PeopleSoft®

EnterpriseOne 8.10 Maintenance Requests PeopleBook

May 2004

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Maintenance Requests PeopleBook
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About These EnterpriseOne PeopleBooks Preface

EnterpriseOne PeopleBooks provide you with the information that you need to implement and use PeopleSoft EnterpriseOne applications.

This preface discusses:

- EnterpriseOne application prerequisites
- Obtaining documentation updates
- Typographical elements and visual cues
- Comments and suggestions

Note

EnterpriseOne PeopleBooks document only fields that require additional explanation. If a field is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use EnterpriseOne applications.

See the *Foundation Guide*.

You might also want to complete at least one EnterpriseOne introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using EnterpriseOne menus and forms. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your EnterpriseOne applications most effectively.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You can find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Note

Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, *http://www.peoplesoft.com/corp/en/login.jsp*

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions
- Visual cues

Typographical Conventions

The following table contains the typographical conventions that are used in EnterpriseOne PeopleBooks:

Typographical Convention or Visual Cue	Description
Italics	Indicates emphasis, topic titles, and titles of PeopleSoft or other book-length publications. Also used in code to indicate variable values.
Key+Key	A plus sign (+) between keys means that you must hold down the first key while you press the second key. For example, Alt+W means hold down the Alt key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicates an adjective that is used in a way that might not be readily understood without the quotation marks, for example "as of" date, “as if” currency, "from" date, and "thru" date.
Cross-references	EnterpriseOne PeopleBooks provide cross-references either below the heading “See Also” or preceded by the word See. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

EnterpriseOne PeopleBooks contain the following visual cues:

- Notes
- Cautions

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note

Example of a note.

Cautions

Text that is preceded by *Caution* is crucial and includes information that concerns what you must do for the system to function properly.

Caution

Example of a caution.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager, PeopleSoft Inc., 4460 Hacienda Drive, Pleasanton CA 94588

Or you can send e-mail comments to *doc@peoplesoft.com*.

While we cannot guarantee an answer to every e-mail message, we will pay careful attention to your comments and suggestions.

Maintenance Request Overview

Maintenance requests allow an organization to create a central point-of-contact for all customer service processes. You can capture and manage maintenance requests, as well as create work orders to fulfill maintenance requests. On the maintenance request entry or work order entry screens, you can use menu exits to quickly retrieve information about the customer, product, or issue. Fast and efficient information retrieval provides business intelligence, reduces information entry errors, and increases customer satisfaction.

You can use the maintenance request programs to:

- Record contact between customers and consultants.
- Track an issue with a single record.
- Assign maintenance requests to queues and to responsible persons.

  For example, you might use queues to ensure that foreign language maintenance requests are directed to the appropriate person, or you might use queues to represent specific products and assign maintenance requests to consultants who are knowledgeable about each product.

- Track tasks that are assigned to another open queue or to a personal queue.
- View issues, based on selection criteria.
- Maintain a database of failure descriptions, analyses, and resolutions that you can search and reuse.
- Track severity and highlight critical issues.
- Store and track customer issues.

Customers are concerned with the amount of time that it takes to call and report an issue. They do not want to be asked to supply information more than once, or to provide information that the supplier or service provider should have available. Customers expect and demand fast and efficient service.

You enter information once, and the system provides that information to all of the parties who need it. If you use Computer Telephony Integration (CTI), all of the information that the system captures appears on the maintenance request entry screen. Once you identify a serial number, equipment number, or item number, the system uses the information from the equipment record and contract to complete the maintenance request entry screen.

For each issue, the system can track the ownership, date, and time that issues are received and completed, the analysis of the root cause, and the client data throughout the life of the issue. The system stores all of the current and historical information about the maintenance request in one database. Each time that you make changes to a maintenance request, the system saves the entire record as well as the new information.

When you select or create a customer record that is associated with a maintenance request, the system automatically generates a maintenance request number that you can use to track the progress on the request. Consultants can view detail information about the customer, including maintenance request history and contracts.

Terms and Concepts

The following terms are used in this guide:

Analysis
The research and tests that you perform to resolve a customer issue.

Maintenance request
The format for receiving customer issues. They include:

- Telephone
- Facsimile (fax)
- E-mail

Maintenance request work center
A central location that allows you to view all of the open and personal queues, and allows you to move maintenance requests between queues.

Issue
A question or problem that is generated by a customer and for which the customer wants a solution. A customer can communicate the issue by telephone, facsimile, or e-mail. Issues are contained within maintenance requests.

Failure analysis
The database that you use to store failure descriptions, analysis, and resolutions that are associated to issues.

Open queue
A folder that contains open, unassigned maintenance requests and tasks. It can also display teams that are associated with the queue.

Personal queue
A folder that contains assigned maintenance requests and tasks that are associated with one responsible consultant.

Resolution	The solution that is attached to an issue. Resolutions are stored separately from failures and can be searched for and reused for other issues.
Failure	The problems that are attached to an issue. Failures are stored separately from resolutions and can be searched for and reused for other issues.
Task	An action that is related to an issue. A consultant can assign a task to another consultant or to an open queue.
Computer Telephony Integration (CTI)	The interface that enables a computer to act as a call center. It accepts incoming maintenance requests and routes them to the appropriate device or person.

Understanding the Interface

The Maintenance Request interface uses the following icons and colors to help you capture information.

Icons

Telephone	This icon represents a maintenance request in the work center.
Ringing telephone	This icon represents a callback in the work center.
Tools	This icon represents product history in the maintenance request.
Person	This icon represents customer history in the maintenance request.
Open folder	This icon represents open tasks in the maintenance request.
Triangle	This icon represents tasks in the work center.
Three dots	This icon represents additional contacts for the maintenance request.

Green check mark	This icon indicates that a customer is entitled.
Circle with a line through the middle	This icon indicates that a customer is not entitled.
Tree structure	This icon indicates that the maintenance request has been assigned to a queue. You can click on the icon to review the routing.
Burning envelope	This icon represents a flash message attachment.

Colors

You can assign colors and attach the color to a priority level. Enter the color of the priority that you want in the special handling code of the UDC (17/PR). Twelve colors are available:

- Blue
- Yellow
- Red
- Fuchsia
- Teal
- Gray
- Lime
- Aqua
- Navy
- Maroon
- Purple
- Olive

System Integration

To allow you to manage and store maintenance request information, the Maintenance Request programs integrate with the PeopleSoft EnterpriseOne Inventory Management and Advanced Pricing systems, and with the following Service Management applications:

- Work Order Management
- Equipment Master Management
- Contract Management
- Failure Analysis

Work Order Management

Use maintenance requests with work orders to perform the following tasks:

- Create a work order to fix the product.
- Enter a work order for the maintenance request.
- Search online for parts and enter a parts recommendation.
- Check parts availability and place reservations on people or required items, such as hardware, software fixes, documentation, or drivers.
- Select a service type for the maintenance request from either a list of entitled services or from per-call services for which the caller is billed.

Equipment Master Management

Use maintenance requests with the Equipment Master to perform the following tasks:

- Review system configurations (such as hardware, software, or communication types) that reflect version, quantities, parts, serial numbers, and status.
- Select or create an equipment record for use when capturing a maintenance request that can be updated.

Contract Management

Use maintenance requests with Contract Management to perform the following tasks:

- Review entitlement information for the customer and for the piece of equipment. Information stored by Contract Management includes the contract type and the services, coverage, and dates covered by the contract.
- Check entitlement of the customer and of the piece of equipment.

Failure Analysis

Use Failure Analysis to review and associate failures, analysis, and resolutions with maintenance requests. Key features of this module include the following:

- A database of problems, research and testing, and solutions
- Reusable units of knowledge
- Failure analysis transactions, where you can associate a failure from a maintenance request with an analysis and resolution

Setting Up Maintenance Requests

Before you can use any of the features of the Maintenance Request programs, you need to define information that the system uses for processing. You also need to specify information that is used when you enter data into the system, such as the issue for the maintenance request.

UDCs for Maintenance Requests

You can access these UDCs from the Maintenance Request User Defined Codes menu (G17431).

17/PR	Maintenance Request Priority
17/CR	Maintenance Request Reason
17/SC	Maintenance Request Source
17/ST	Maintenance Request Status
17/CT	Maintenance Request Type
17/EN	Environment
17/GR	Geographic Region
H91/TZ	Time Zones
17/WT	Work Type
17/CB	Call Back
17/TN	Task Name
17/01 through 17/10	Maintenance Request Category Codes 1 through 10
00/RR	Object In Use Application ID. Use this user defined code table to check when objects are in use in specific applications and to allow only one person at a time to access a record. Set this user defined code to check access in the Maintenance Request Entry program (P17501). To activate record locking, the first character of the special handling code is 1. If you do not want to perform record locking, the first character of the special handling code is 0.
40/RN	Returned Material Status. If you are using the Returned Material Authorization (RMA) module, you must also set up the RMA status user defined codes

Setting Up Maintenance Request Constants

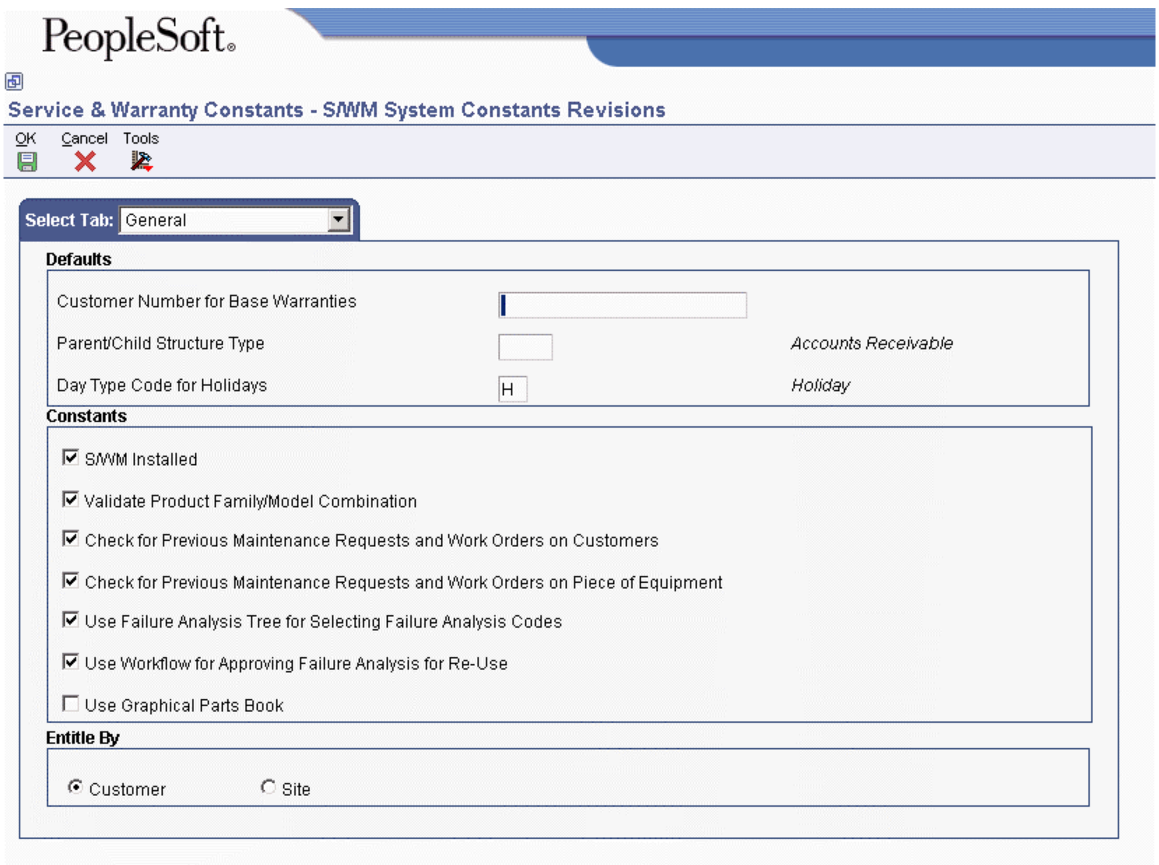
To define default information for the entire system, you set up system constants. Constants control the types of information that you track and the rules that the system uses to perform certain calculations.

► To set up maintenance request constants

Use one of the following navigations:

For Capital Asset Management, choose Service & Warranty Constants from the Plant & Equipment Management Setup menu (G1341).

For Service Management, choose Service & Warranty Constants from the Service & Warranty Setup menu (G1740).

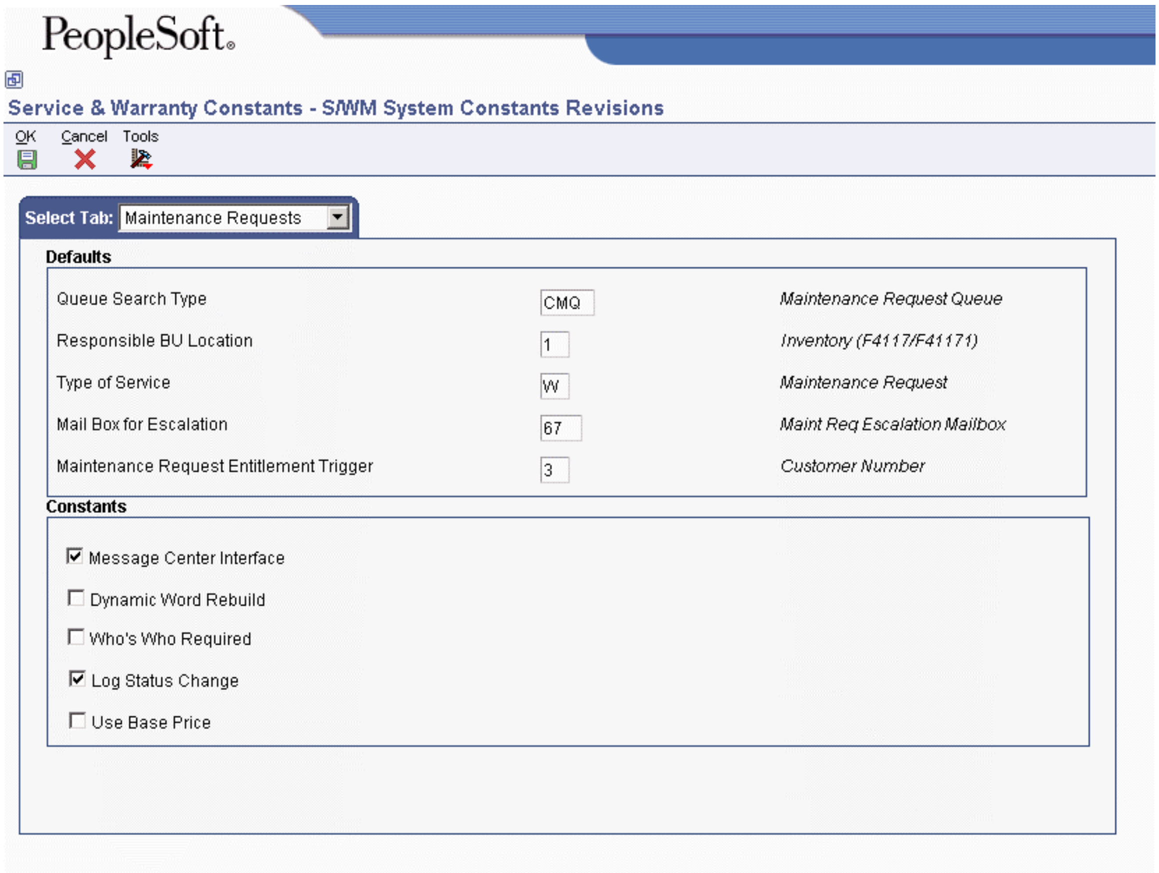


1. On SWM System Constants Revisions, click the General Tab.
2. To set up the system to automatically check for history on a piece of equipment, an item number, or a product model, click the following option:
    - Check for Previous Maintenance Requests and Work Orders on Piece of Equipment

3. To set up the system to automatically check for customer history, click the following option:

   - Check for Previous Maintenance Requests and Work Orders on Customers

4. Click the Maintenance Requests tab.



5. To identify the kind of address book record that you want the system to select when you are searching for a queue or creating a maintenance request queue, complete the following field:

   - Queue Search Type

     Enter a user defined code (01/ST).

6. To identify the classification of a maintenance request that is assigned for entitlement checking, complete the following field:

   - Type of Service

     This type of service is assigned to a maintenance request for entitlement checking. Enter a user defined code (00/TY).

7. To hold messages for escalation, enter the location in the following field:

   - Mail Box for Escalation

8. If the processing options for Maintenance Request MBF (P1700140) are set to automatically check for entitlements, complete the following field to define which data item causes the system to run an entitlement check:
   - Maintenance Request Entitlement Trigger
9. To use the Message Center Interface along with the standard interface, choose the following option:
   - Message Center Interface

     The standard interface is the default.
10. To indicate that the caller must be identified in the Who's Who database for a consultant to accept the maintenance requests, choose the following option:
    - Who's Who Required
11. To create a log each time that you change the status, click the following option:
    - Log Status Change

      When you log status changes, the status codes are added before and after each status change in the text area of the media object that is attached to the maintenance request.
12. Click OK.

Setting Up Maintenance Request Queues

Set up maintenance request queues to direct issues to the specialists who are trained to receive maintenance requests about specific product groups or issues.

You can specify maintenance request types, priorities, and queue status information for each queue that you set up, or you can use generic information for all of your queues.

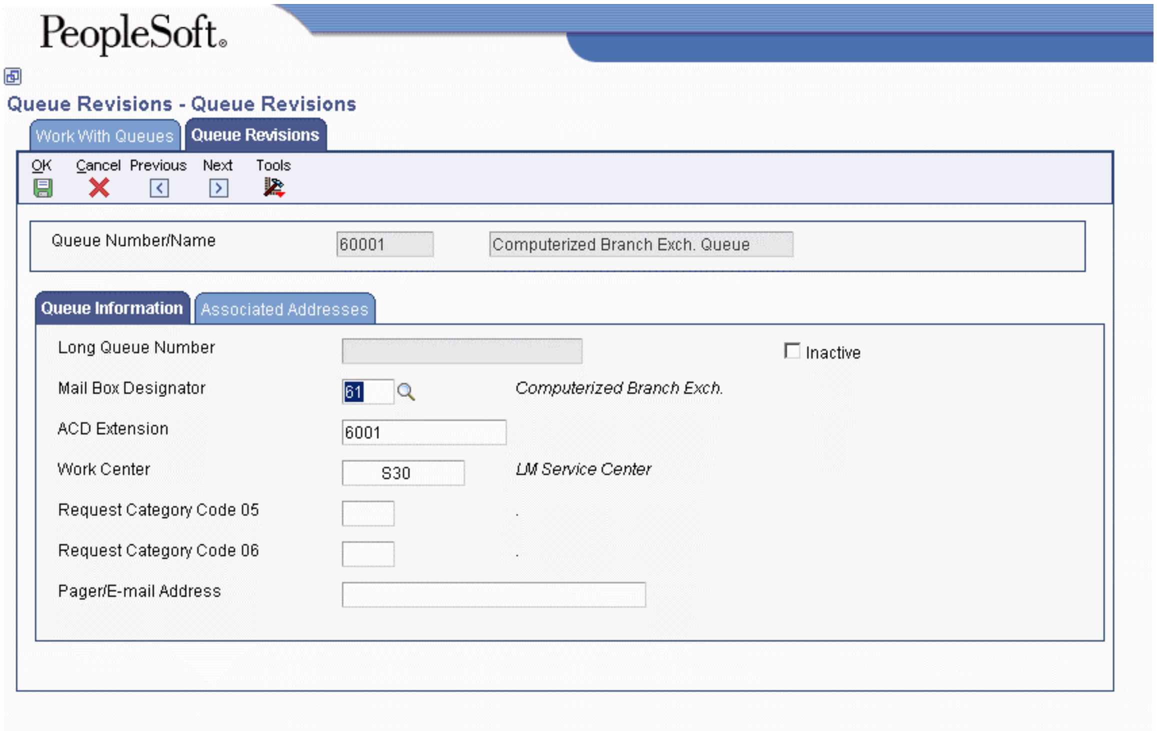
Adding a Maintenance Request Queue

You must set up at least one queue and assign maintenance requests to this queue. You might add queues if your organization expands its product groups or you decide to assign specialists to answer maintenance requests by knowledge of product groups.

► **To add a maintenance request queue**

From the Maintenance Request Setup menu (G1743), choose Queue Revisions.

1. On Work With Queues, click Add.



2. On Queue Revisions, enter an existing address book number in the following field:

   - Queue Number/Name

     If you leave this field blank, the system assigns an address book number to the queue. To create a queue without using an existing address book number, you can either manually enter a queue number, or you can leave the field blank and allow the system to assign a queue number. The system creates an address book record for this new queue with that queue number.

3. To designate the queue name that you want to appear in the maintenance request work center, complete the following fields:

   - Alpha Name
   - Long Queue Number

4. Enter mailbox and telephone number information in the following fields:

   - Mail Box Designator
   - ACD Extension

     Enter the mailbox that is associated with the queue. Maintenance requests are directed to this mail box when they assigned to the open queue.

5. To calculate commitment date and time if you are not using entitlements, complete the following field:

   - Work Center

   The system also uses the work center to calculate the elapsed time and the time remaining on the request.

6. For additional reporting, complete the following fields:
   - Request Category Code 05
   - Request Category Code 06

     Use Request Category Codes to enter information on a request. You can use this information for reporting on queues.

   - Pager/E-mail Address
7. To associate a consultant, such as the queue manager, with a queue, click the Associated Addresses tab and complete any of the following fields:
   - 1st Address Number
   - 2nd Address Number
   - 3rd Address Number
   - 4th Address Number
   - 5th Address Number
   - 6th Address Number

     The system completes the Address Number information for a request assigned to a queue.

   Do not associate the address book number of consultants who receive maintenance requests for this queue in this field. Instead, associate consultants with the queues that are appropriate for reporting purposes or for workflow.
8. Click OK.

Processing Options for Work with Queues (P17506)

Versions

1. Address Book MBF (P0100041) Version

Blank = ZJDE0001

Default

1. Document Type

Display

1. Display Maintenance Request Queues or Work Order Queues.

Blank = Work Order Queues.

1= Maintenance Request Queues.

Setting Up Maintenance Request Types

To organize maintenance requests, you can set up various request types, depending on how your organization chooses to receive requests. The types of requests might include:

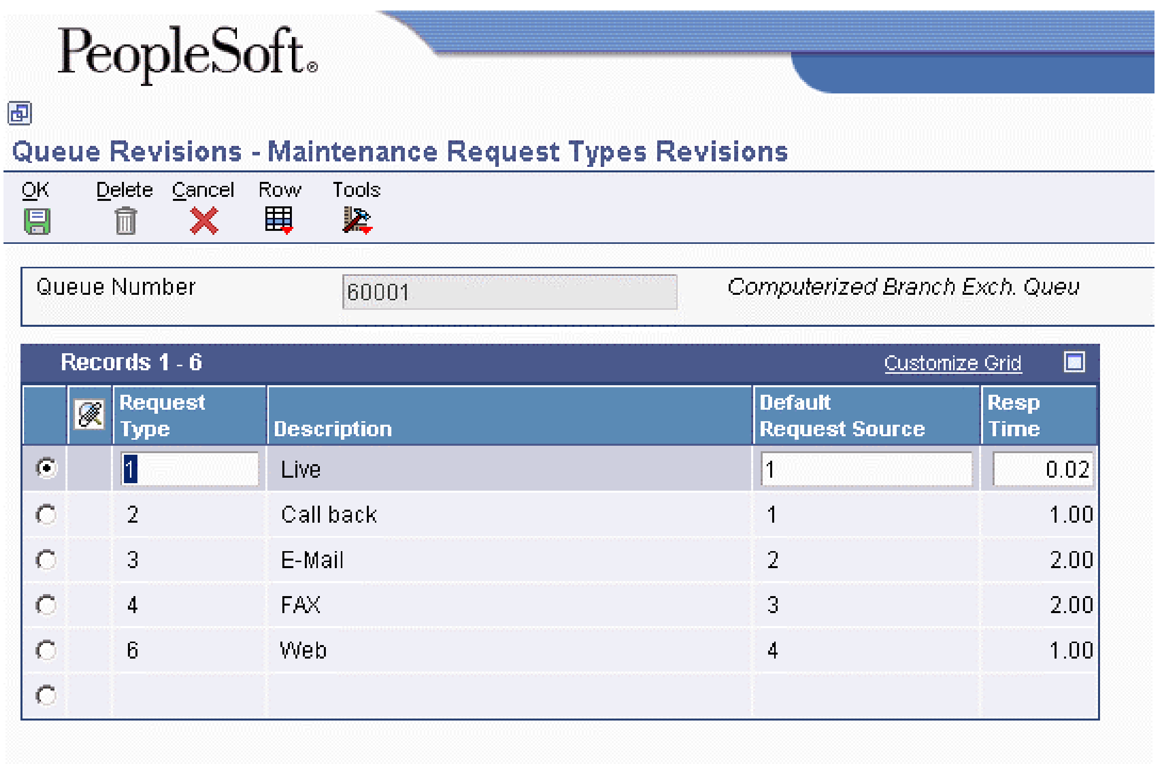
- Facsimile
- Live telephone call
- Returned phone call
- E-mail

► To set up maintenance request types

From the Maintenance Request Setup menu (G1743), choose Queue Revisions.

1. On Work With Queues, determine and locate the queue to which you want to add maintenance request types.
2. From the Row menu, choose Queue Types Setup.

   To set up a request type that encompasses all queues, choose Queue Type Setup from the Form menu instead of the Row menu.



3. On Maintenance Request Types Revisions, complete the following fields:
   - Request Type
   - Default Request Source
   - Resp Time

   Enter Response Time to define a guaranteed length of time when a consultant must respond to an issue. This guaranteed response time is used to calculate commitment date and time, and escalation date and time if the request is not covered under a contract.

   Note

   If a contract covers a request, then the contract response time overrides the response time on the Maintenance Request Types Revisions form.

   ---

4. Click OK.

Setting Up Queue Priorities for Maintenance Requests

You can set the maintenance request priorities that are associated with a queue. When you set priorities, the system updates the Maintenance Request Priority table (F1753).

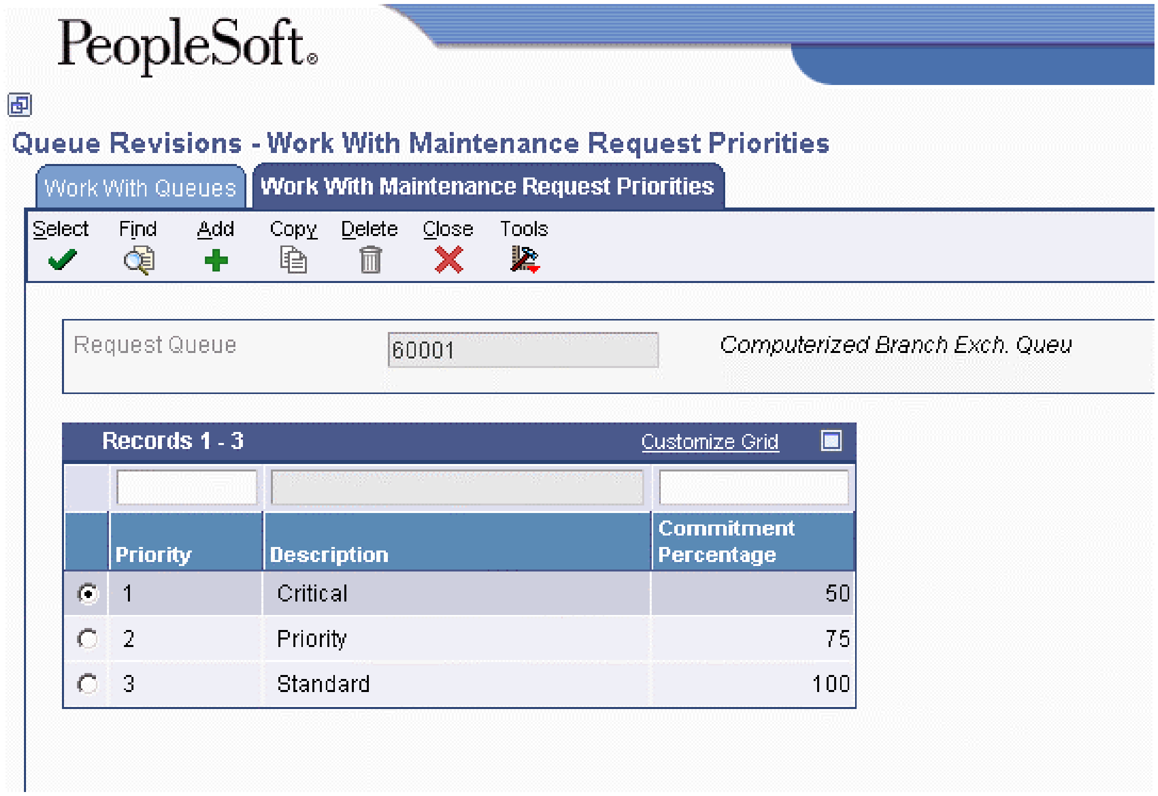
You can set up as many escalation levels as necessary. The system sends escalation messages until the issue is closed or until no more escalation levels exist.

► To set up queue priorities for maintenance requests

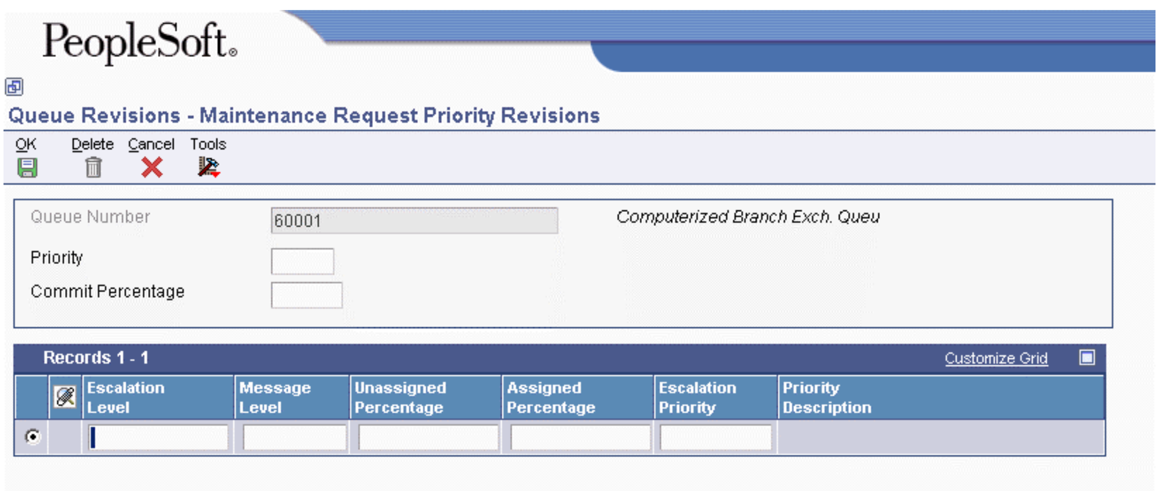
From the Maintenance Request Setup menu (G1743), choose Queue Revisions.

1. On Work With Queues, determine and locate the queue to which you want to add priorities.
2. From the Row menu, choose Queue Priorities.

   To set up priority revisions that encompass all queues, choose Queue Priorities from the Form menu instead of the Row menu.



3. On Work With Maintenance Request Priorities, click Add.



4. On Maintenance Request Priority Revisions, enter the level of severity of the customer issue in the following field:

    - Priority

5. To define the percentage used to calculate escalation date and time, and commitment date and time when the maintenance request is not covered under a contract, complete the following field:

    - Commit Percentage

    When a request is not covered under a contract, the calculation for Commitment Date and Time is Current Date and Time + (Guaranteed Response Time x Commit Percentage).

6. Complete the following fields:

    - Escalation Level

      The escalation level comes from a request and must be greater than or equal to 1.

    - Message Level

      The message level is associated with the group number on the Address Parent/Child Revisions form and helps determine who should receive messages when the request is escalated.

    - Unassigned Percentage

      The system uses the unassigned percentage to calculate escalation date and time for unassigned requests. The calculation is Escalation Date and Time = Commitment Date and Time x Unassigned Percentage.

    - Assigned Percentage

      The system uses the assigned percentage to calculate escalation date and time for assigned requests. The calculation is Escalation Date and Time = Commitment Date and Time x Assigned Percentage.

    The values in the percentage field can be over 100% since you can send escalation messages after the commit time has been reached.

7. Complete the following optional field and click OK:

    - Priority Description

      To escalate a request to a higher priority, enter the priority here. If you do not enter a priority, the system only sends messages as opposed to changing the request priority and sending messages.

Setting Up Queue Status for Maintenance Requests

You can set up queue status for maintenance requests to define the status flow for document types, queues, and maintenance request types; and to define the next step, based on the current status. For the system to continue to the next step, you must enter the next status in the Last Status field. If you do not include the next status, the maintenance request is considered complete. If you enter an open status code in one of the other columns, you can reopen the request.

The following table is an example of how you might set up queue statuses. The Last Status column shows the status of the maintenance request and the Status Description column provides a description of the status. The remaining columns in the table show the next statuses that are allowable for the request at this (Last Status) status. For example, you can change an open request (100) to an active request (150). Then you might leave a message (250), or you might cancel the request (997). This table also shows that a request that is complete (999) can be reopened.

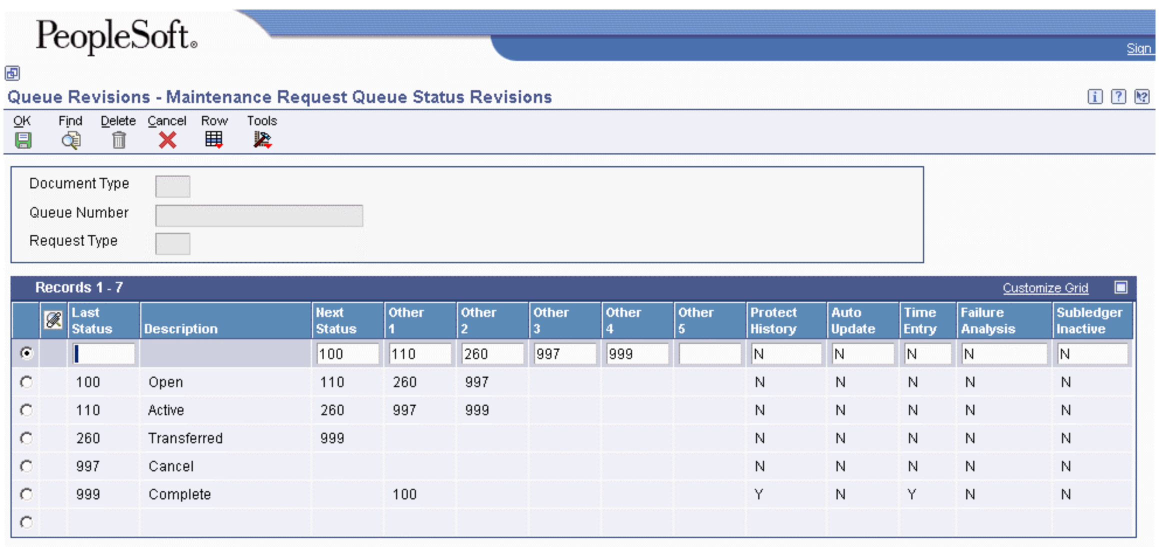
Last Status	Status Description	Next Status	Other	Other
100	Open	150	250	997
150	Active	999		
250	Left Message	999		
997	Cancel			
999	Complete		100	

You can set up statuses that are based on specific or all document types, queues, and maintenance request types.

► To set up queue status for maintenance requests

From the Maintenance Request Setup menu (G1743), choose Queue Revisions.

1. On Work With Queues, choose Queue Status Rev. (Revisions) from the Form menu.



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Queue Revisions - Maintenance Request Queue Status Revisions

OK Find Delete Cancel Row Tools

Document Type

Queue Number

Request Type

Records 1 - 7

Customize Grid

Last Status	Description	Next Status	Other 1	Other 2	Other 3	Other 4	Other 5	Protect History	Auto Update	Time Entry	Failure Analysis	Subledger Inactive
		100	110	260	997	999		N	N	N	N	N
100	Open	110	260	997				N	N	N	N	N
110	Active	260	997	999				N	N	N	N	N
260	Transferred	999						N	N	N	N	N
997	Cancel							N	N	N	N	N
999	Complete		100					Y	N	Y	N	N

2. On Maintenance Request Queue Status Revisions, enter the status code that you are revising in the following field:

   - Last Status

3. In the following field, enter the status to which the maintenance request will advance if auto update is enabled.

   - Next Status

     If you consider the last status you are entering to be a "closed" request, leave this field blank. The only way the system knows the request is closed is if the Next Status field is blank. If you want to be able to be re-open a closed request, enter that status in one of the Other status fields.

4. To designate that maintenance request text can or cannot be changed at a particular status, complete the following field:
   - Protect History
5. Complete the following fields and click OK:
   - Auto Update

     This field directs the system to change the status of a request automatically when you click OK.
   - Time Entry

     This field specifies whether the system displays the Time Entry form.
   - Failure Analysis

The Subledger Inactive field is reserved for future use.

Setting Up Required Fields for Maintenance Requests

You can define the fields in which you are required to enter information before the system advances a maintenance request to the next status in the queue. Required fields can be based on specific request document types, request queues, and request types; or they can be set up to cover all document types, queues, and request types. For example, when you advance a live request (call type 1) in the VIP queue to the complete status (999), you can complete the reason field (CALLRN).

You can also use this procedure to set up required fields for tasks.

Prerequisite

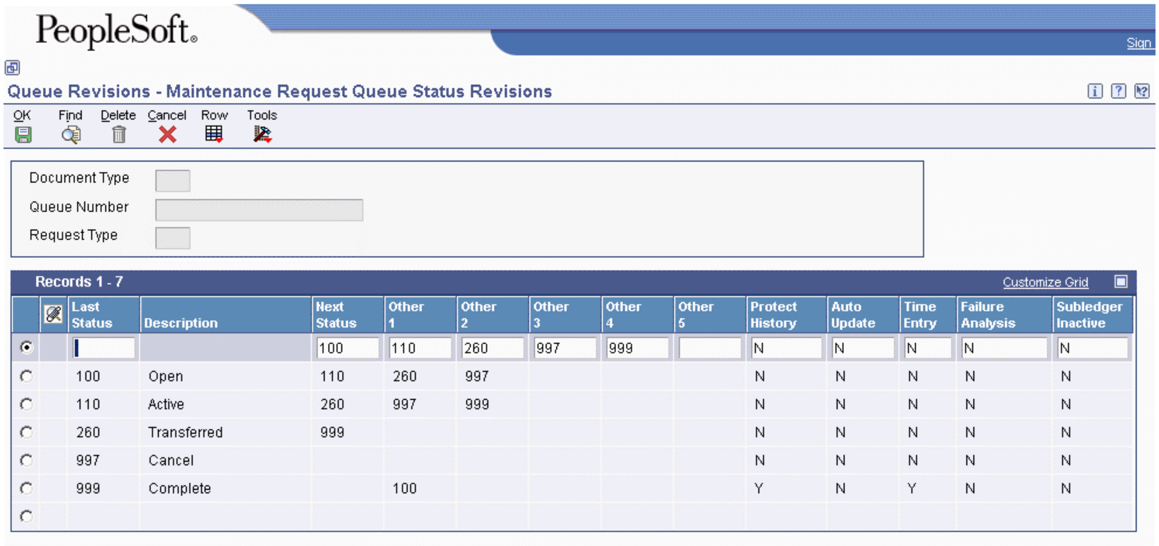
- ❑ Set the Check Required Fields processing option to enable the system to verify that information is in the required fields:
  - If you are setting up required fields for maintenance requests, see the processing options for Maintenance Request MBF (P1700140).
  - If you are setting up required fields for tasks, see the processing options for Tasks (P17504).

► To set up required fields for maintenance requests

From the Maintenance Request Setup menu (G1743), choose Queue Revisions.

1. On Work With Queues, locate the queue for which you want to define required fields.
2. Choose one of the following options:
   - To set up status revisions for a specific queue, select the queue and choose Queue Types Setup from the Row menu. Then go to step 3.
   - To set up status revisions that include all queues, choose Queue Status Rev. (Revisions) from the Form menu. Then go to Step 5.
3. On Maintenance Request Types Revisions, complete the following field:
   - Request Type

4. Choose Queue Status from the Row menu.



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Queue Revisions - Maintenance Request Queue Status Revisions

OK Find Delete Cancel Row Tools

Document Type

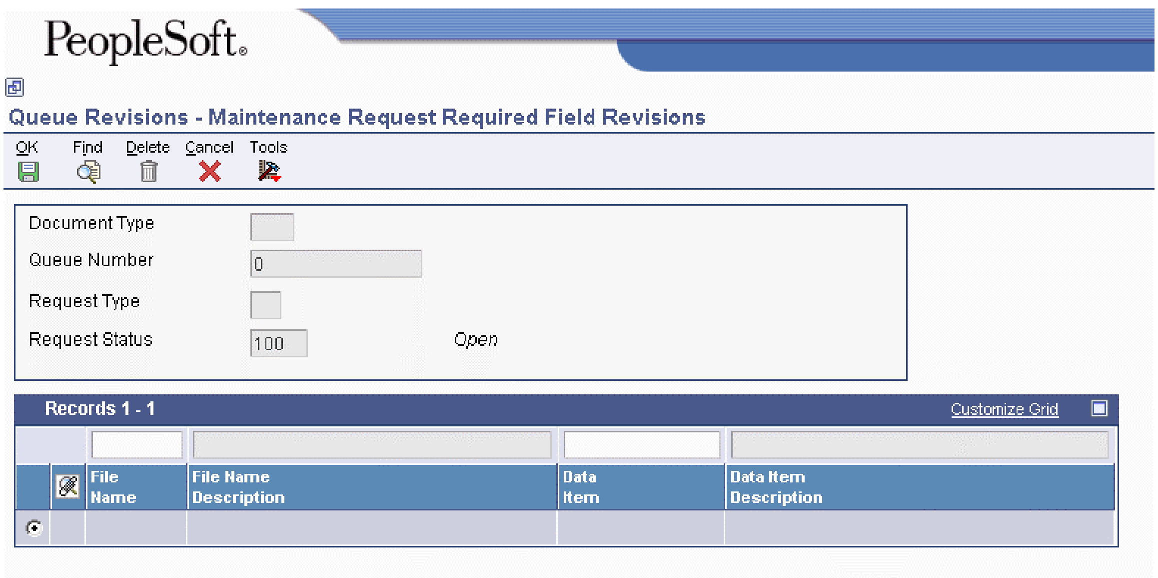
Queue Number

Request Type

Records 1 - 7 Customize Grid

Last Status	Description	Next Status	Other 1	Other 2	Other 3	Other 4	Other 5	Protect History	Auto Update	Time Entry	Failure Analysis	Subledger Inactive
		100	110	260	997	999		N	N	N	N	N
100	Open	110	260	997				N	N	N	N	N
110	Active	260	997	999				N	N	N	N	N
260	Transferred	999						N	N	N	N	N
997	Cancel							N	N	N	N	N
999	Complete		100					Y	N	Y	N	N

5. On Maintenance Request Queue Status Revisions, to define required fields at a particular status, select the status row and choose Required Fields from the Row menu.



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Queue Revisions - Maintenance Request Required Field Revisions

OK Find Delete Cancel Tools

Document Type

Queue Number 0

Request Type

Request Status 100 *Open*

Records 1 - 1 Customize Grid

File Name	File Name Description	Data Item	Data Item Description

6. On Maintenance Request Required Field Revisions, complete the following fields and click OK:

   - File Name
   - Data Item

   If you set up required fields for maintenance requests, you choose data item fields from the Maintenance Request Master table (F1755).

   If you set up required fields for tasks, you choose data item fields from the Task Master table (F1757).

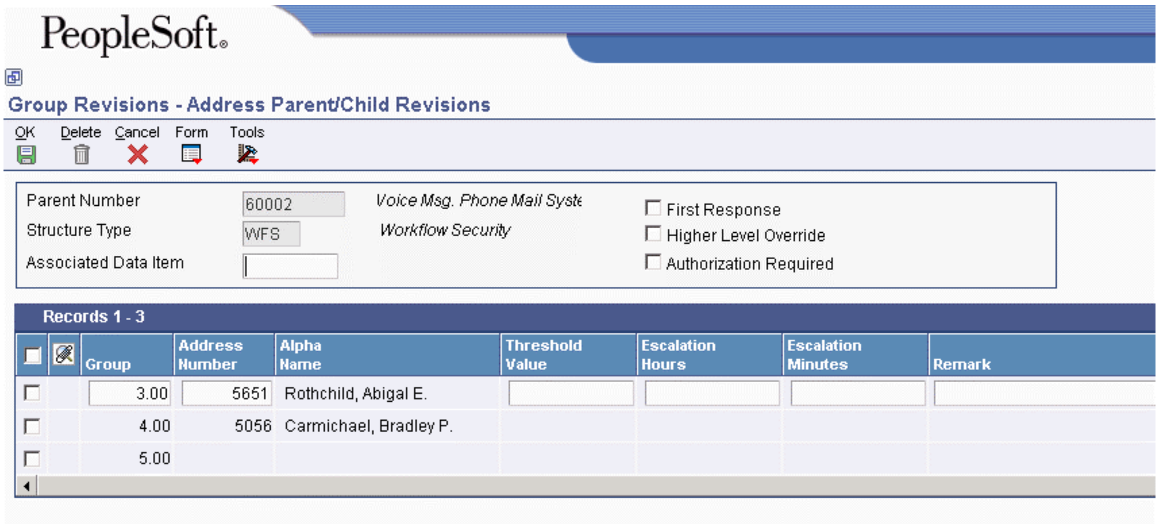
Setting Up Group Distribution Lists

You use distribution lists to attach assignees to queues. When you define organizational structures, you create hierarchies of relationships between parents and children.

▶ To set up group distribution lists

From the Maintenance Request Setup menu (G1743), choose Group Revisions.

1. On Work With Distribution Lists, click Add.



2. On Address Parent/Child Revisions, complete the following fields:
   - Parent Number
3. Enter WFS in the following field:
   - Structure Type
4. For each assignee in this queue, complete the following fields:
   - Group
   - Address Number
5. Complete the following optional fields for each assignee:
   - Remark
   - Begin Eff Date
   - End Eff Date
6. Click OK.

Note

Threshold values, escalation hours, and escalation minutes are not used for maintenance requests.

Setting Up Queue Security

You can set up the security status for a user or group of users within a workflow message queue. You can add security by user, distribution list, or both. For example, you might set up security for managers so that they can monitor all of the messages within certain queues.

► To set up queue security

From the Maintenance Request Setup menu (G1743), choose Queue Security.

1. On Work With Workflow Message Security, click Add.

2. On Workflow Message Security Revisions, complete the following fields:
   - User
   - Group/Role
3. Specify the queues that a user can view by completing the following field and click OK:
   - Authority Y/N

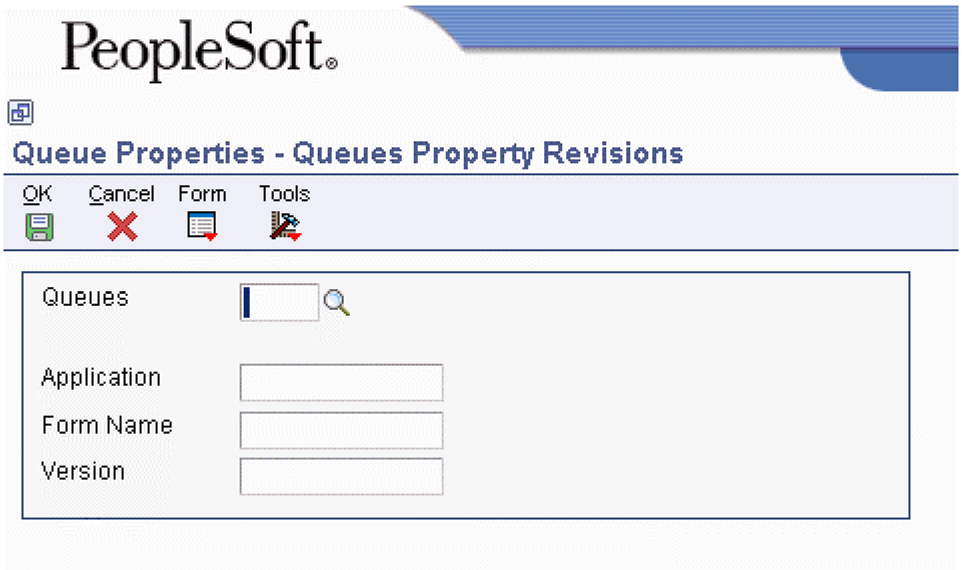
Setting Up Queue Properties

Setting up queue properties provides a link to a system application if, for example, you want recipients to review information within an application whenever they open messages in that particular queue.

► To set up queue properties

From the Maintenance Request Setup menu (G1743), choose Queue Properties.

1. On Work With Queues, click Add.



2. On Queues Property Revisions, complete the following fields and click OK:

   - Queues
   - Application
   - Form Name
   - Version

Setting Up Routing Information

When you set up routing information, you can direct maintenance requests to the queues that you set up and in the order that you determine is the most logical.

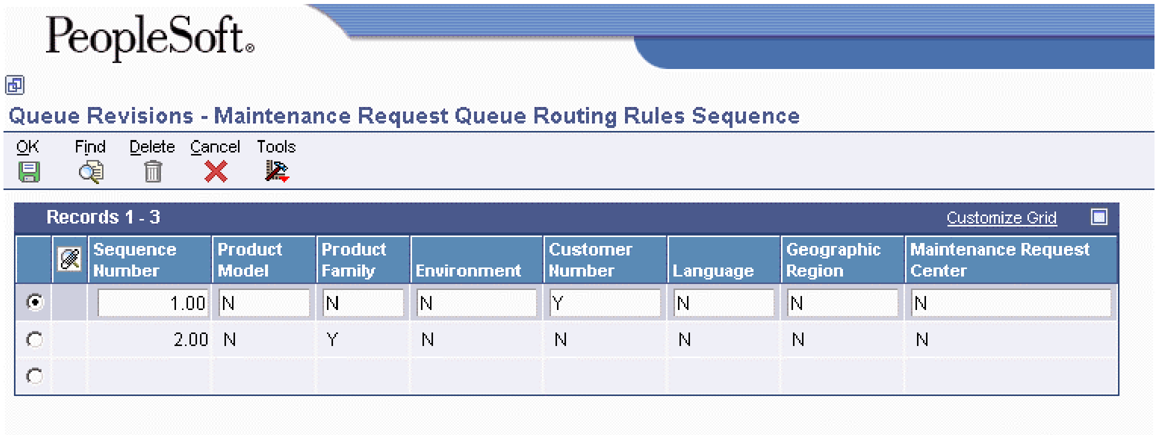
Setting Up a Routing Sequence

You can manage the order in which a maintenance request is routed to queues. Use routing sequence to define how the system searches through the routing rules to determine the queue to which an incoming request is directed.

▶ To set up a routing sequence

From the Maintenance Request Setup menu (G1743), choose Queue Revisions.

1. On Work With Queues, choose Routing Sequence from the Form menu.



2. On Maintenance Request Queue Routing Rules Sequence, complete the following fields and click OK:

   - Sequence Number
   - Product Model
   - Product Family
   - Environment
   - Customer Number
   - Language
   - Geographic Region
   - Maintenance Request Center

   You must define the order that the system will use to search for a match between the maintenance request and routing rules. The system uses a hierarchical search method, from most specific to most general. Complete the fields with a Y to include them in the hierarchical search.

Setting Up Routing Rules

You can add to or revise the prescribed path that allows you to assign maintenance requests to the proper queue. You might assign requests to certain queues or individuals based on their knowledge of a product family or a language.

You can assign maintenance requests to a queue based on any of the following or any combination of the following information:

- Customer address book number
- Maintenance request center location
- Product model
- Product family

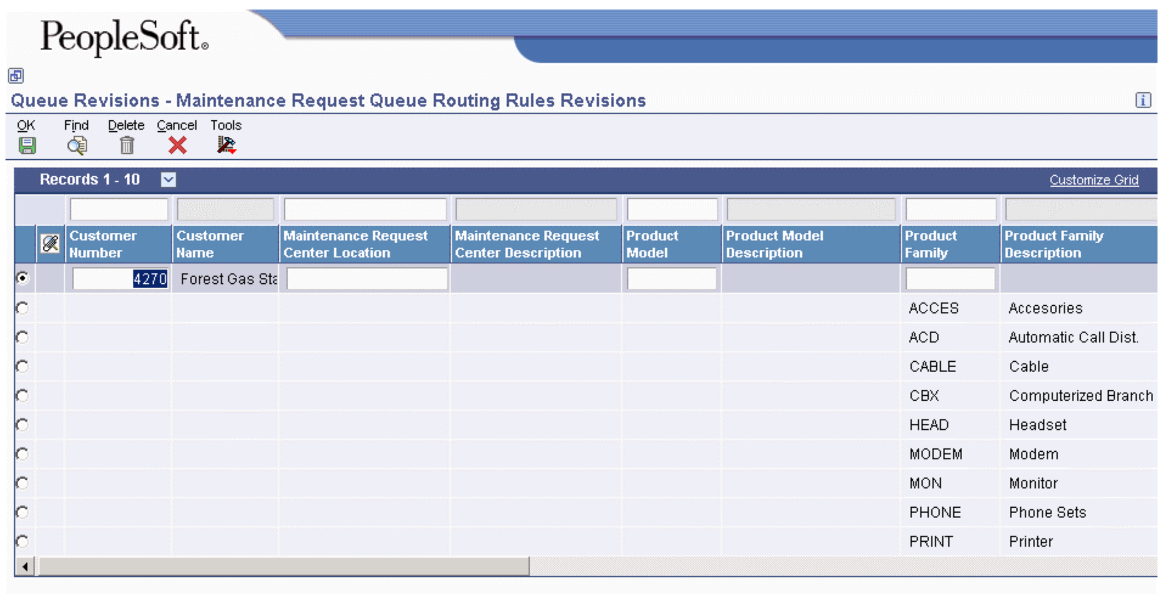
- Environment
- Address book language code
- Address book geographic region code

You can define the maintenance request center location in the address book for the service provider, who is the person entering the request. In Address Book Revisions, access the address book record for the service provider and enter the maintenance request center location in the business unit field.

▶ To set up routing rules

From the Maintenance Request Setup menu (G1743), choose Queue Revisions.

1. On Work With Queues, choose Routing Rules from the Form menu.



2. On Maintenance Request Queue Routing Rules Revisions, to narrow your search, complete any of the following fields and click Find:
   - Customer Number
   - Maintenance Request Center Location
   - Product Model
   - Product Family
   - Environment
   - Language
   - Geographic Region
3. To assign a person and a queue to a maintenance request, complete the following fields and click OK:
   - Request Queue
   - Assignee Number

Entering Maintenance Requests

When you enter a maintenance request, you include specific information about the issue or failure. You must provide the following minimum information:

- One of the following items:
  - Address book number of the customer
  - Equipment number or Serial Number (depending on Installed Base Constants)
  - Item number
  - Product model
- The name of the person initiating the maintenance request.
- A brief description of the issue or failure.
- A queue number, if routing has not been set up. The system can also provide a default queue number that is based on the processing options.

You can enter additional information when you add the issue, including:

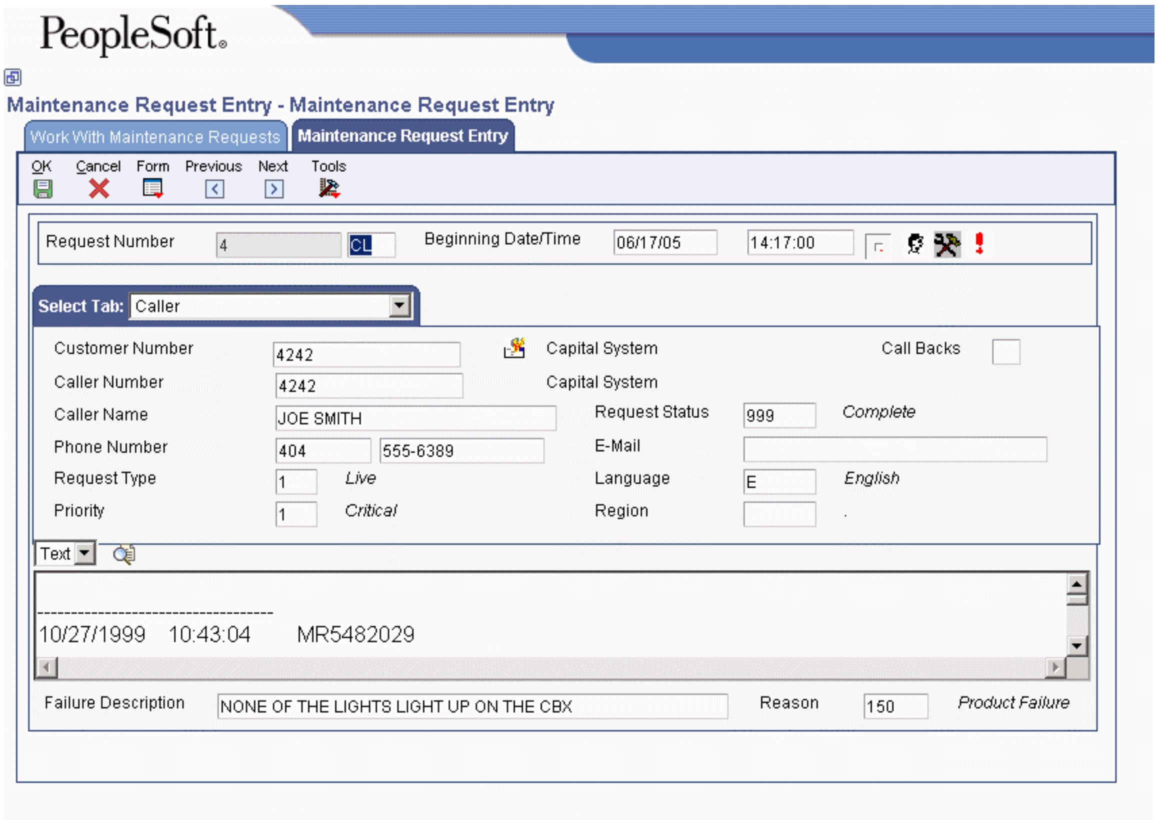
- Free-form text that allows you to provide more detail than the Failure Description field allows.
- A task or action that is related to an issue which you can assign to another open or personal queue. In certain circumstances, you might assign yourself a task and reassign the issue to another open or personal queue.
- A resolution or the solution that you attach to the issue through Failure Analysis. Resolutions are stored separately from issues (failures) and can be searched for and reused for other similar issues. You can search for a resolution to your issue and attach it, or you can create a new one.

When you enter a maintenance request, you review a series of forms to ensure that the information for the customer is accurate.

► To enter maintenance requests

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work With Maintenance Requests, click Add.



2. On the Caller tab of Maintenance Request Entry, complete the following field and press the tab key to move to the next field:

   - Customer Number

     If the customer is not in the system, go to step 3.

     If the customer is in the system, the system retrieves information about that customer, such as telephone number. This information appears as default values that you can override, if necessary. Go to step 8.

Note

As an option, to enter a maintenance request, you can complete the Serial Number, Inventory Item Number, or Product Model/Family field on the Product tab.

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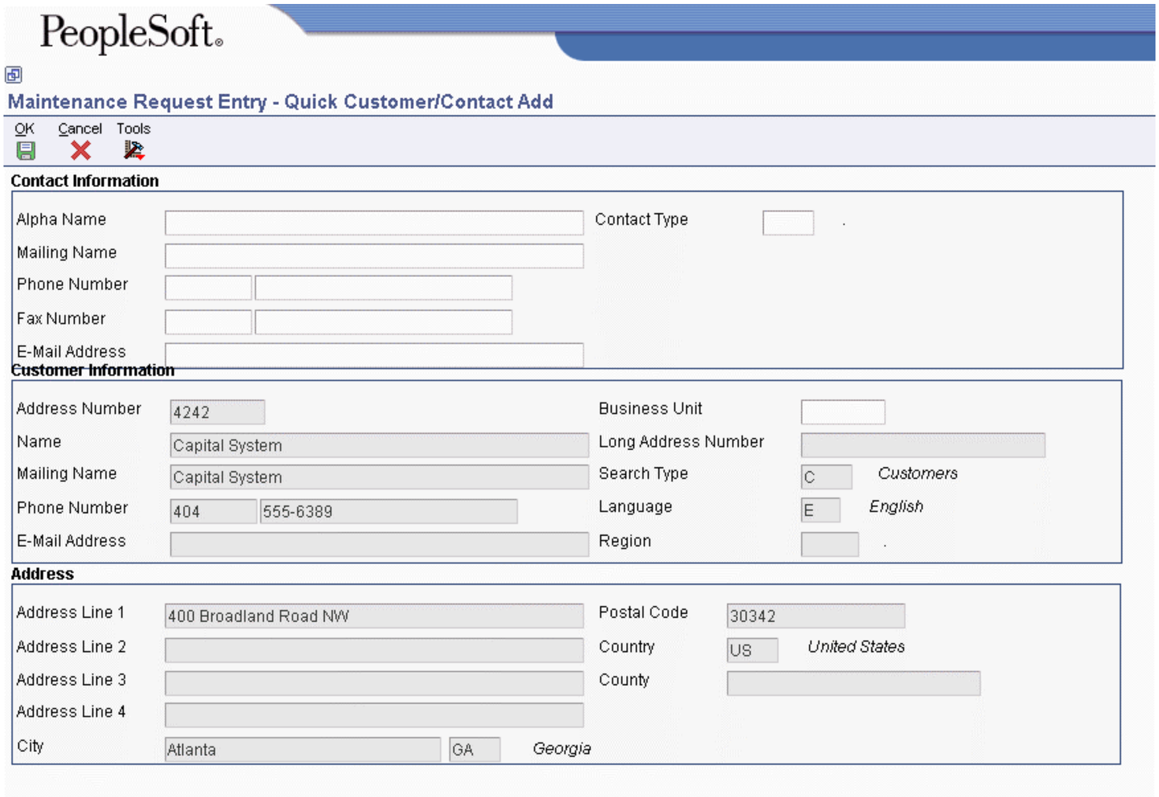
3. If the customer is not in the system, choose Customer from the Form menu, choose Address Book, and then choose Quick Add.



4. On Quick Customer/Contact Add, enter customer information by completing the following fields:

   - Address Number
   - Name
   - Phone Number
   - E-Mail Address

5. To enter customer address information, complete the following fields and click OK:

   - Address Line 1
   - Address Line 2
   - Address Line 3
   - Address Line 4
   - City
   - Postal Code
   - Country
   - County

6. Click OK to return to Maintenance Request Entry.
7. On Maintenance Request Entry, complete the following field:

   - Customer Number

Note

As an option, to enter a maintenance request, you can complete the Serial Number, Inventory Item Number, or Product Model/Family field on the Product tab.

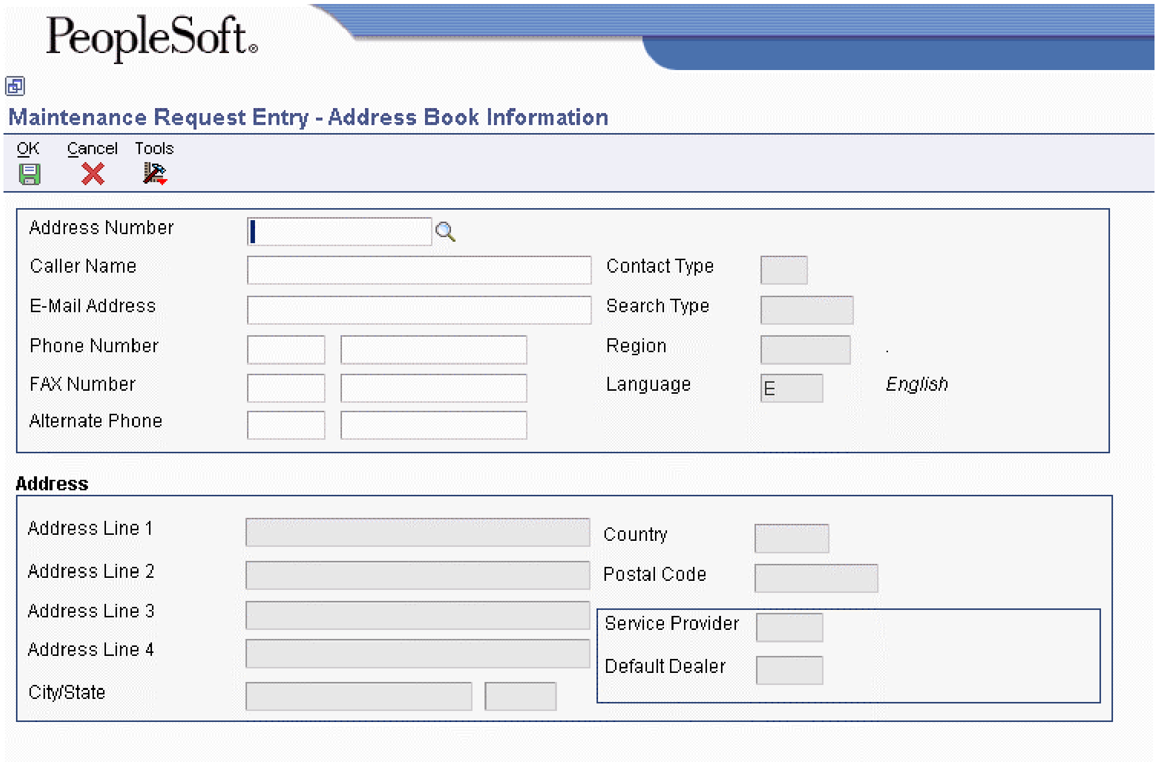
8. To associate a third party with the maintenance request, such as a technician or customer service representative, complete the following field on the Caller tab:
    - Caller Number
9. To indicate the customer contact name for this Maintenance Request, complete the following field:
    - Caller Name
10. Complete the following fields, if necessary. You can override any of the defaults that are provided by the system:
    - Phone Number
    - Request Type
    - Priority
    - Request Status
    - E-Mail
    - Language
    - Region
11. Enter a short description for the maintenance request in the following field:
    - Failure Description

      Depending on how you have set your processing options, you can use the first 80 characters from the media object as the default value for the Failure Description field.

      Also, you can use the search button to select a failure description.
12. To indicate the reason for the issue, complete the following field:
    - Reason
13. To attach additional text to a maintenance request, choose Attachments from the Form menu and enter additional text in the text box.

    When you define your status rules, you can define when you want to protect the text that is attached to a maintenance request. When you protect text, you are preventing changes to the text that is attached to a request. You can add text to existing text that is protected, but you cannot make changes to existing text.

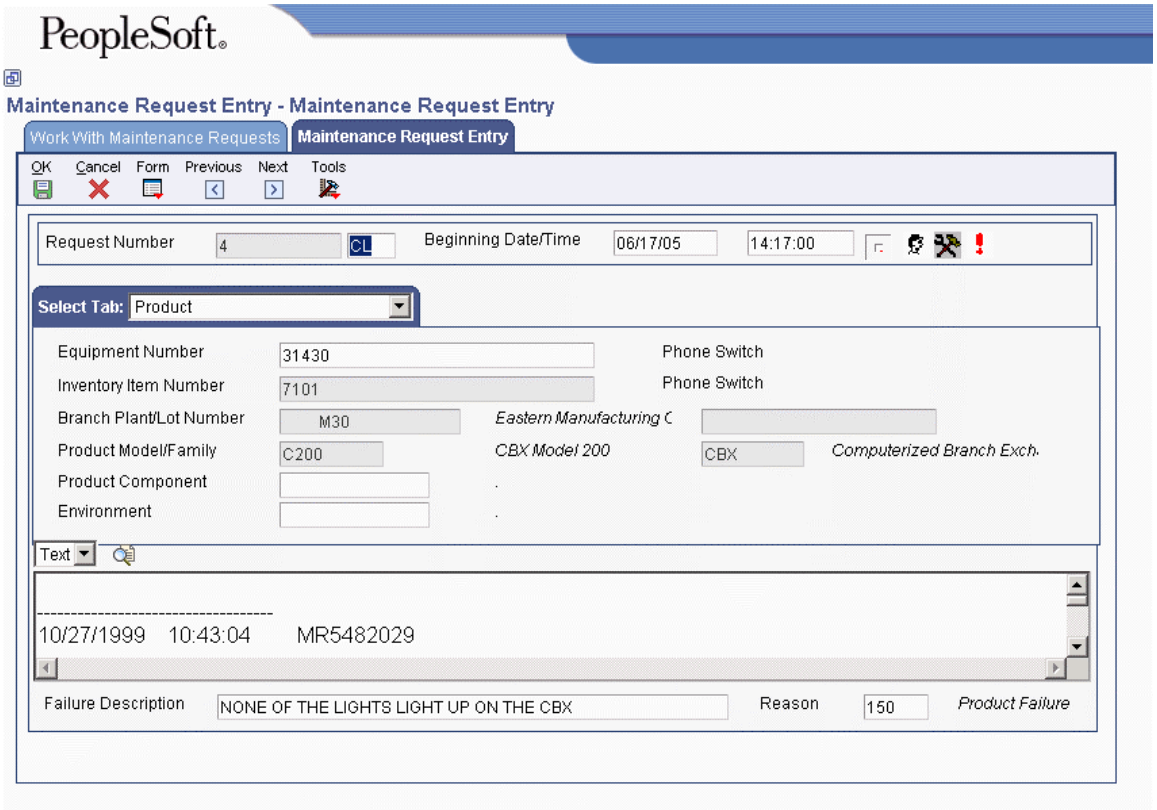
    The system appends a time stamp to the text area when the information changes.
14. To associate an additional person with a maintenance request without affecting the address book record, from the Form menu of Maintenance Request Entry, choose Customer, Address Book, and then Contact One.



15. On Address Book Information, complete any of the following fields and click OK:

- Caller Name
- E-Mail Address
- Phone Number
- FAX Number
- Alternate Phone

16. On Maintenance Request Entry, click the Product tab.



17. Complete any of the following fields:

    - Equipment Number

      You might enter the Serial Number or Item Number in the Equipment Number field, based on the Equipment Constants.

    - Inventory Item Number
    - Product Model/Family

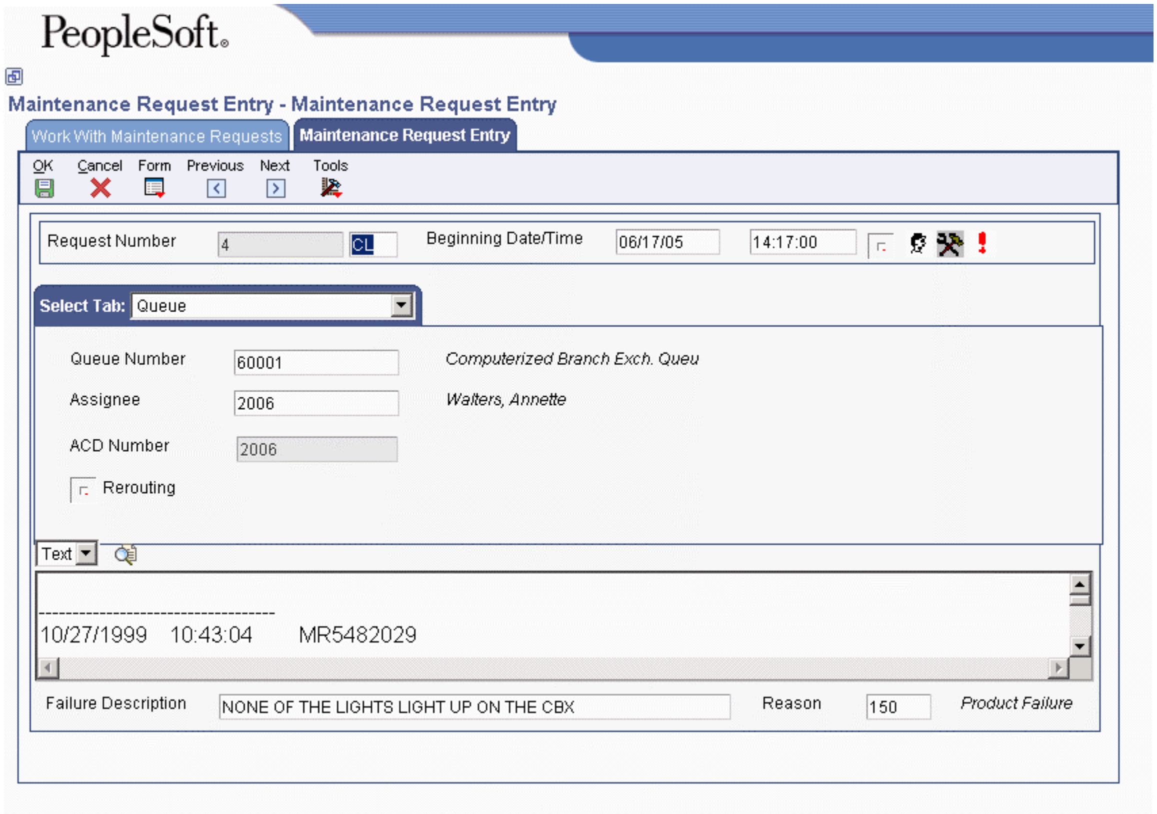
    Based on the equipment number that you set up in the equipment record, the system retrieves the inventory item number, branch/plant lot, and product model/family.

    If you do not enter the equipment number, the system retrieves the branch/plant lot and the product model/family, based on the inventory item number.

18. Complete the following optional fields:

    - Product Component
    - Environment

19. Click the Queue tab.



20. To enter the queue assignment for the maintenance request, complete the following field:

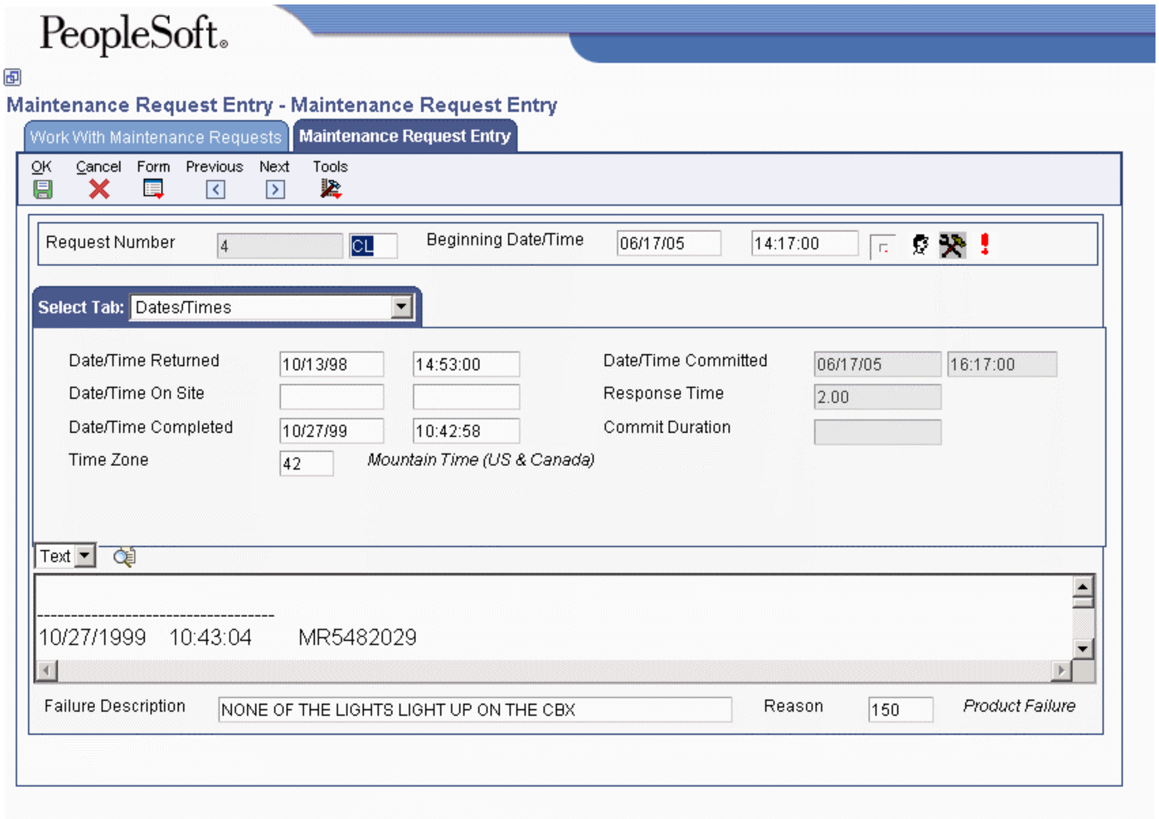
    - Queue Number

      If your company has set up routing rules, the system automatically assigns issues to a specific queue and person, based on the type of maintenance request that is received.

21. To enter the person assigned to the maintenance request, enter the employee number in the following field:

    - Assignee

22. Click the Dates/Times tab.



23. To enter date and time information for the maintenance request, review or complete the following fields:

- Date/Time Returned

  When a maintenance request is first assigned to a consultant, the system supplies the current date and time.

- Date/Time On Site

  This field is the date and time that the service provider arrived at the customer site.

- Date/Time Completed

  The default is the date and time that you close the maintenance request.

- Time Zone

  The system retrieves the time zone of the service provider as the default value. This time zone is for all of the the date/time fields.

- Date/Time Committed

  If the maintenance request is covered under a contract, this field contains the Current Date and Time + the Guaranteed Response Time on the contract.

If the maintenance request is not covered under a contract, this field contains the Current Date and Time + Guaranteed Response Time, which is based on the queue and maintenance request type. This value is multiplied by the commitment percentage, which is based on the queue and priority.

- Response Time

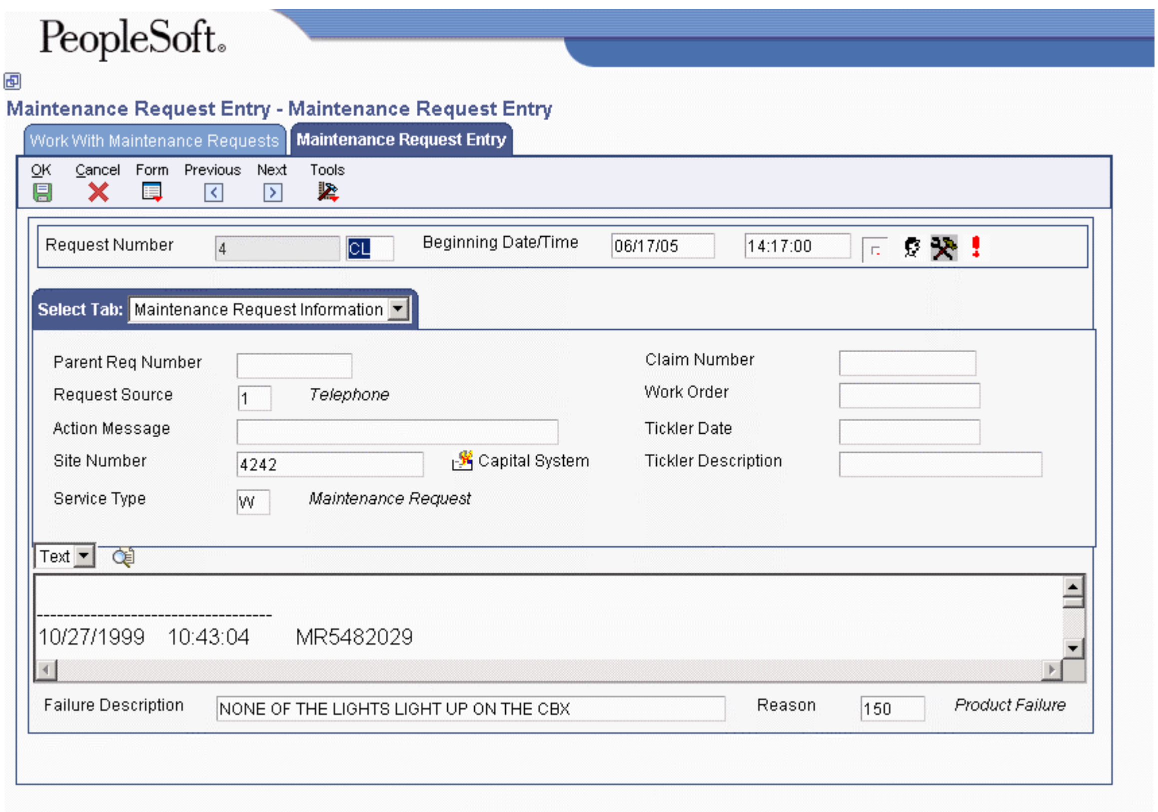
  If the maintenance request is covered under a contract, this field contains the guaranteed response time from the contract.

  If the maintenance request is not covered under a contract, this field contains the guaranteed response time based on the queue and maintenance request type.

- Commit Duration

  This value is the amount of time between the date and time that you enter the maintenance request and the date and time that you assign the maintenance request.

24. Click the Maintenance Request Information tab.



25. To enter additional information that appears in the workbench, use a short description to complete the following field:

- Action Message

26. Complete the following fields, if applicable:

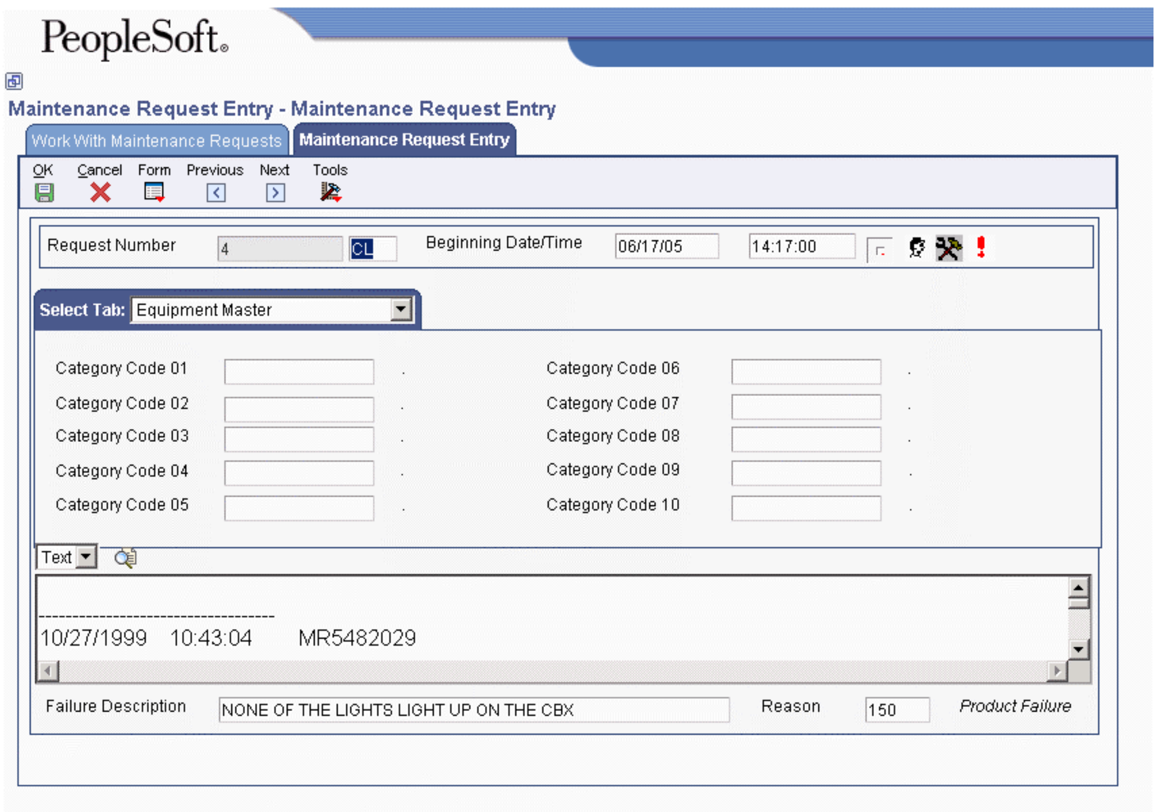
    - Parent Req Number
    - Request Source
    - Claim Number
    - Work Order

27. To set a reminder that appears in the maintenance request work center, complete the following fields:

    - Tickler Date
    - Tickler Description

    When you enter tickler dates, the system creates a message in the mailbox of the queue or assignee with the tickler date. For example, you can use the tickler fields if you want to call a customer after closing the maintenance request to ensure that the issue does not require further attention.

28. Click the Equipment Master tab.

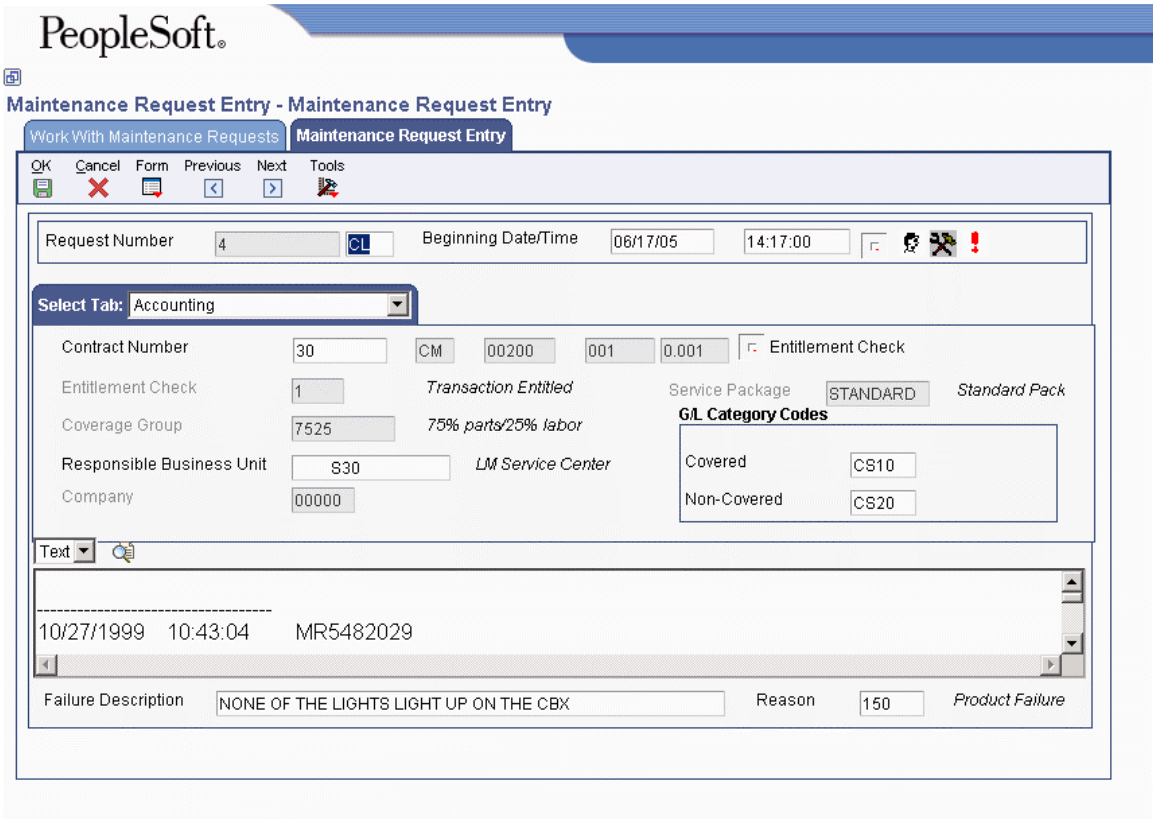


29. To enter or review equipment reporting codes, complete the category code fields as necessary.

30. Click the Category Codes tab.

31. To enter or review category codes for maintenance requests, complete the category code fields as necessary.

32. Click the Accounting tab.



33. To enter accounting information for the maintenance request, review or complete the following fields:
    - Contract Number
    - Responsible Business Unit
    - Covered
    - Non-Covered
34. The system retrieves default information for the following fields from the service contract that is covering the maintenance request:
    - Coverage Group
    - Service Package
35. When you have finished entering the issue for the maintenance request, click OK.

Entering Billing Information for a Maintenance Request

To enter billing information for a maintenance request, you can choose one of the following pricing methods:

- Flat rate
- Time and materials

For the flat rate method, define billing through the processing options for the Maintenance Request MBF program (P1700140). You can specify the cost type, pricing unit, and pricing unit of measure.

For the time and materials method, define billing through the processing options for Time Entry (P17505). You can define whether the system generates time entry records in the Time Entry table (F1760) and one of the following tables:

- Employee Transactions - Batch File (F06116Z1)
- Journal Entry Transactions - Batch File (F0911Z1)

You can also specify the cost type, labor unit of measure (such as hours), and minimum hours.

Prerequisites

- ❑ Set up distribution AAIs for maintenance request billing.
- ❑ Activate maintenance request billing in the processing options for the Maintenance Request MBF program (P1700140). Access Interactive Versions (IV) in System Administration Tools of Foundation Systems.
- ❑ If you are billing for maintenance requests that are based on time and materials, set up the parameters for maintenance request billing in the processing options for Time Entry (P17505).
- ❑ If you are working with Vertex, set up Vertex transaction types in the following processing options:
  - Maintenance Request MBF (P1700140)
  - Time Entry (P17505)
  - Maintenance Request Workfile Generation (R17675)

Understanding Multicurrency in Maintenance Request Billing

If you work in a multicurrency environment, you can review and edit currency information as necessary. When you review currency information, the following guidelines apply:

- If you do not activate multicurrency, the system does not display currency information fields on the billing information screens.
- If the currency code for the customer is the same as the base currency code (the currency code for the company), the Foreign option is disabled.

- The system retrieves the customer currency code from the customer number in the Customer Master by Line of Business table (F03012). If a currency code does not exist for this customer, the system retrieves the currency code from the company.
- The system retrieves the company number from the Business Unit Master table (F0006). If the value in the Company field is blank, the system uses company 0000. Then the system retrieves the base currency code from the Company Constants table (F0010).
- The system uses the exchange rate, which you can override, to calculate the domestic amount.
- The currency fields are disabled if the maintenance request or time entry records have been billed.
- If you click the Foreign option, the system displays billable amounts in the customer's currency. Otherwise, billable amounts appear in the company's currency.

► To enter billing information for a maintenance request

Note

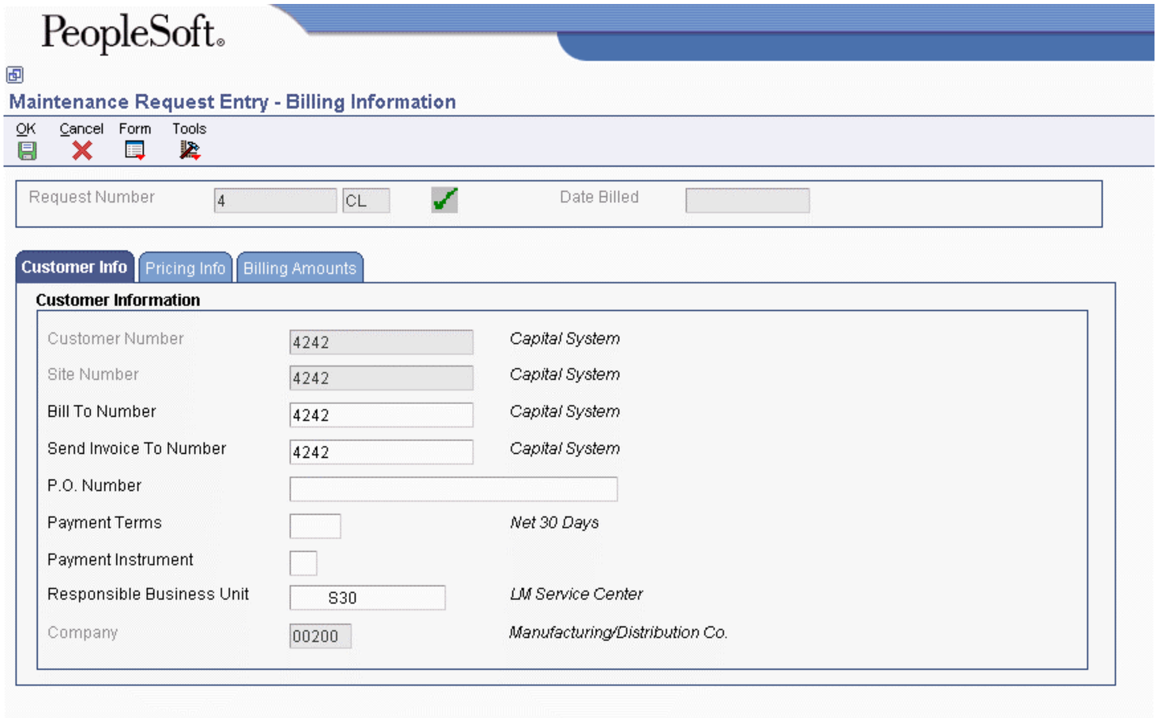
If you are inquiring on a maintenance request that you have already billed, some of the fields in this task might be disabled.

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work With Maintenance Requests, choose the customer for whom you want to enter billing information and click Select.
2. On Maintenance Request Entry, choose Billing and then Billing Information from the Form menu.

   Note

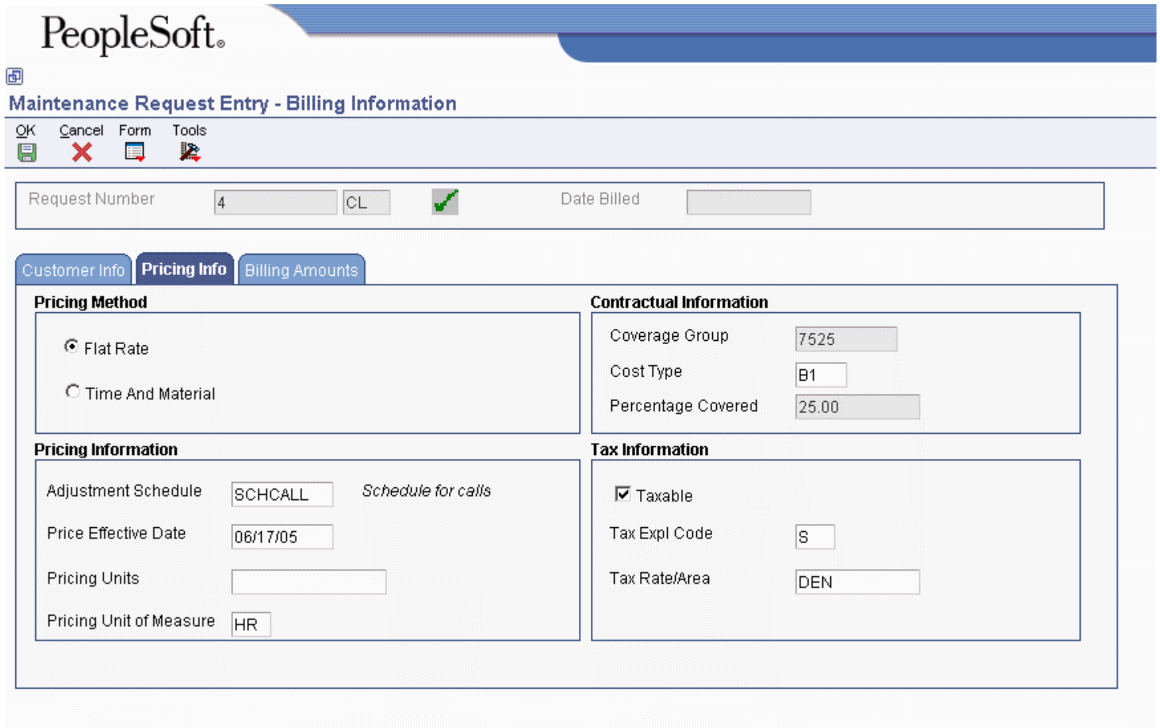
   The system displays the Billing Information form only if you activated the Bill for Maintenance Requests processing option of Maintenance Request MBF (P1700140) in Interactive Versions (IV) of System Administration Tools.



3. On the Customer Info tab of Billing Information, review or complete the following fields:

- Bill To Number
- Send Invoice To Number
- P.O. Number
- Payment Terms
- Payment Instrument
- Responsible Business Unit

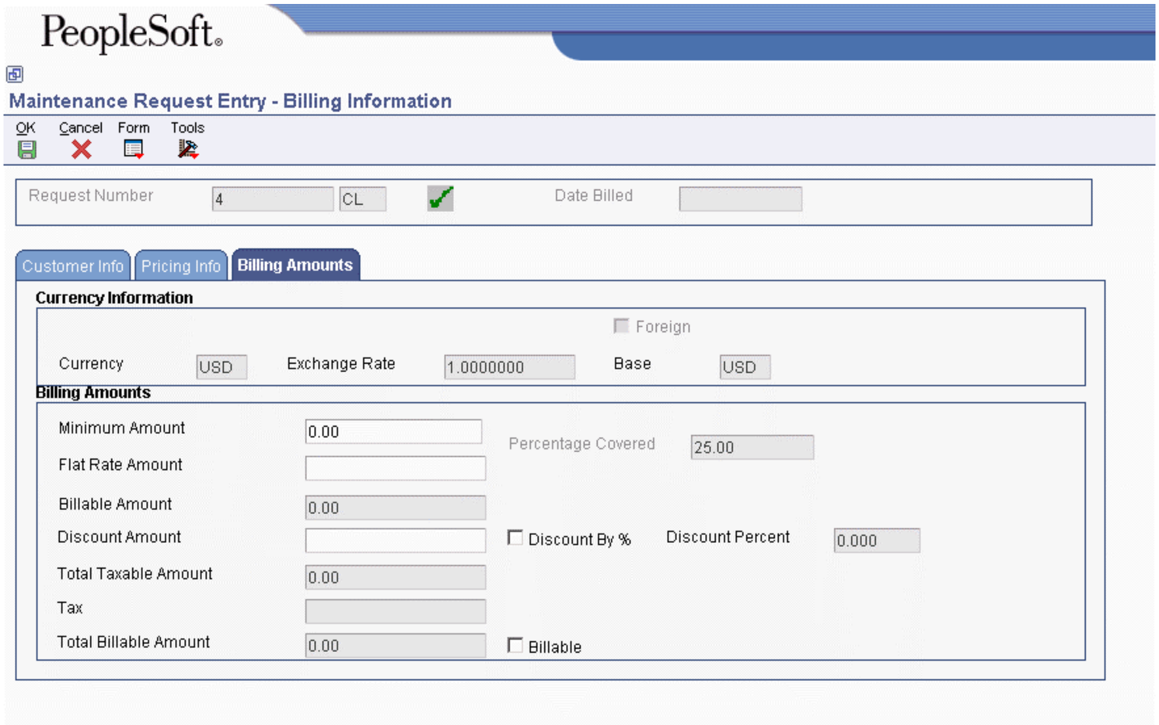
4. Click the Pricing Info tab.



5. Review or select the following pricing methods:
   - Flat Rate
   - Time And Material
6. If you use the flat rate pricing method, complete the following field:
   - Cost Type
7. If you choose the time and materials pricing method, review or complete the following fields:
   - Adjustment Schedule
   - Price Effective Date
   - Pricing Units
   - Pricing Unit of Measure

     If you use the flat rate pricing method, the system disables the Pricing Units and Pricing Unit of Measure fields.
8. If this maintenance request is taxable, click the Taxable option.

   The system enters default values in the Tax Explanation Code and the Tax Rate/Area fields.
9. Click the Billing Amounts tab.



10. If you activated multicurrency, complete the following fields:

    - Currency
    - Exchange Rate
    - Foreign

11. If you use the flat rate pricing method, complete the following fields:

    - Minimum Amount
    - Flat Rate Amount

    The system retrieves the flat rate amount from the Advanced Pricing system. You can override this amount. If you override the amount and later need to retrieve the original default price from the Advanced Pricing system, choose Reprice Flat Rate from the Form menu.

12. Review the billable amount. If you entered a minimum amount and a flat rate amount, the system uses the greater of the two values as the billable amount.

13. To indicate if this maintenance request is subject to a discount, click the Discount by % option and complete the following field:

    - Discount Percent

    If you use the discount percent, the system calculates the discount based on a percentage of the billable amount.

14. To enter the discount amount directly, complete the following field:
    - Discount Amount
15. Review the amounts in the Total Taxable Amount, Tax, and Total Billable Amount fields.

    The system calculates the tax amount by using the tax rate area and the tax explanation code from the Pricing Info tab.

    The Total Billable Amount is the sum of the Total Taxable Amount and the Tax fields.
16. Verify that the Billable option is turned on.

Note

The Billable option must be on to successfully generate an entry when you run the Maintenance Request Workfile Generation program (R17675).

Reviewing Maintenance Request Information

When you are reviewing maintenance requests, you can use the visual prompts, or icons, that appear on the maintenance request entry forms. With these icons, you can review the information so that you do not have to take Form or Row exits to inquire on pertinent information, such as customer and product history, entitlement checking, additional contacts, and callbacks. You can click on the icon to access and review the additional information.

Understanding Icons

The following table lists the icons that might appear when you are working on a maintenance request, along with their meanings:

Phone	This icon represents a maintenance request in the work center.
Ringing phone	This icon represents a callback in the work center.
Tools	This icon represents product history in the maintenance request.
Person	This icon represents customer history in the maintenance request.
Open folder	This icon represents open tasks in the maintenance request.
Triangle	This icon represents tasks in the work center.
Three dots	This icon represents additional contacts for the maintenance request.
Green check mark	This icon indicates that a customer is entitled.
Circle with a line through the middle	This icon indicates that a customer is not entitled.
Tree structure	This icon indicates that the maintenance request has been assigned to a queue based on the routing rules. It appears on every maintenance request and is also known as the rerouting icon.
Burning envelope	This icon represents a flash message attachment.

▶ To review history information

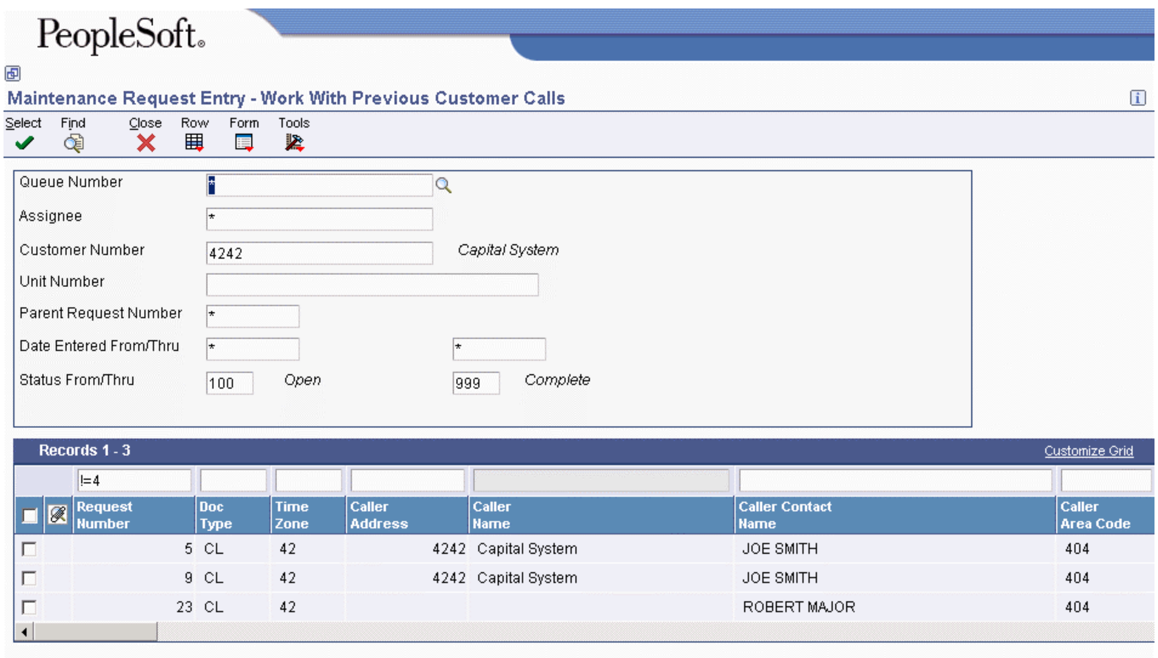
Note

After you complete the steps to enter an issue, you can review history information-- such as information on past repairs or past maintenance-- to help resolve the current issue.

Default dates and status codes are defined by processing options. You can override default information by entering new data in the date or status fields. When you set your processing options, you can enter different statuses and dates to limit the type of history information that you want to review.

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work With Maintenance requests, find the customer for which you want to review history information and click Select.
2. On Maintenance Request Entry, click the Customer icon.



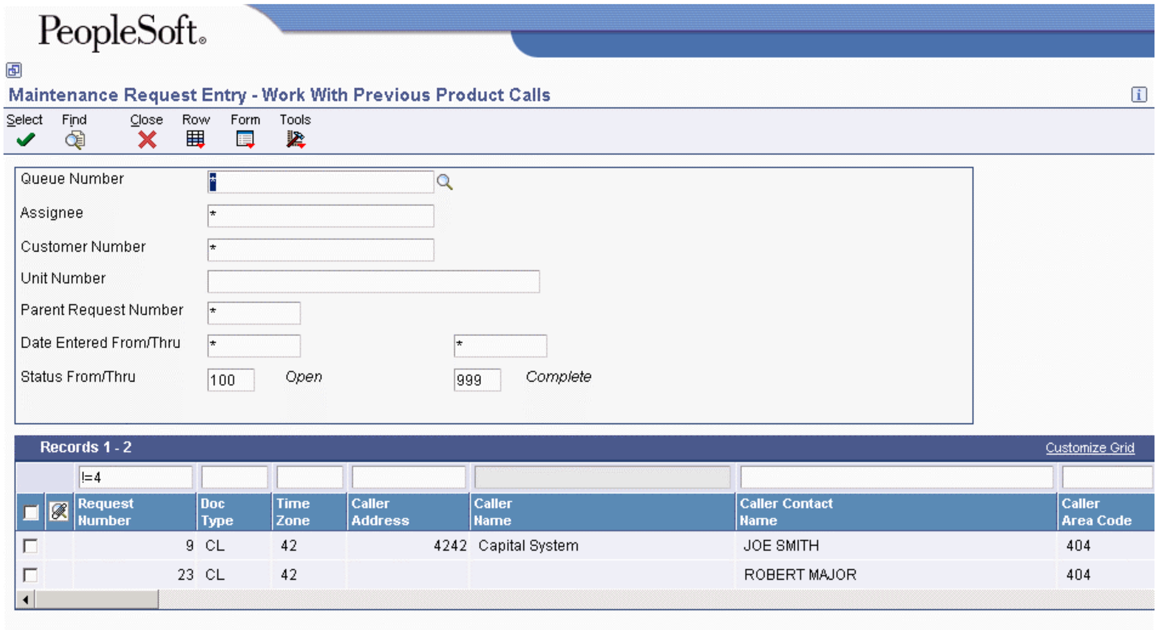
3. On Work With Previous Customer Calls, review the information.
4. Click Close.
5. On the Product tab of Maintenance Request Entry, to review history for a specific product, enter the serial, inventory, or product number in the applicable field:

   - Equipment Number

     You might enter the Serial Number or Item Number in the Equipment Number field, based on the Equipment Master Constants.

   - Inventory Item Number
   - Product Model/Family

6. Click the Product icon.



7. On Work With Previous Product Calls, review the information.

8. Click Close to return to Maintenance Request Entry.

► To review product model and family information

Note

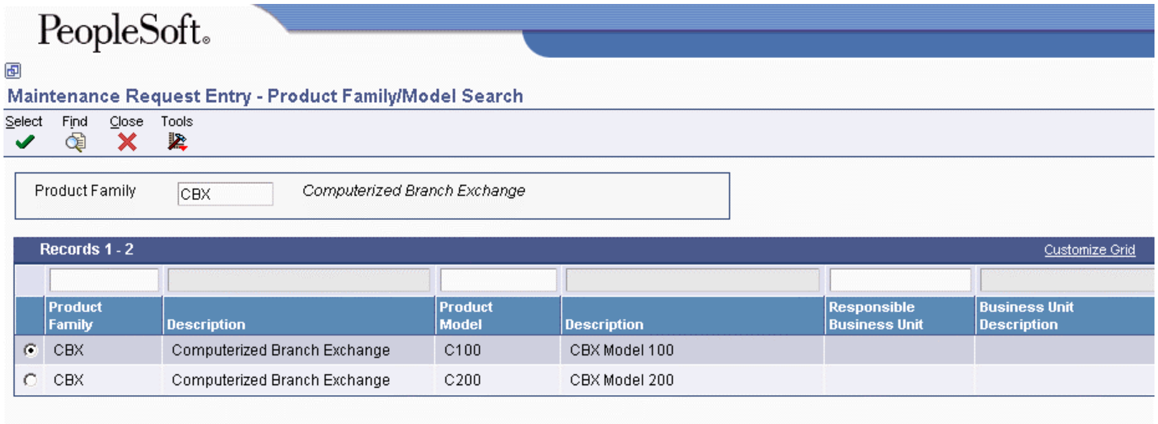
After you review history information, you can also review product and model information.

You can review all of the models that are associated with a family. You might need to review product model information if your customer is unable to provide detailed information for product identification.

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work with Maintenance Requests, choose the desired maintenance request and click Select.

2. On Maintenance Request Entry, choose Model/Family Search from the Form menu.



3. On Product Family/Model Search, complete the following field and click Select:

   - Product Family

► To review customer entitlements

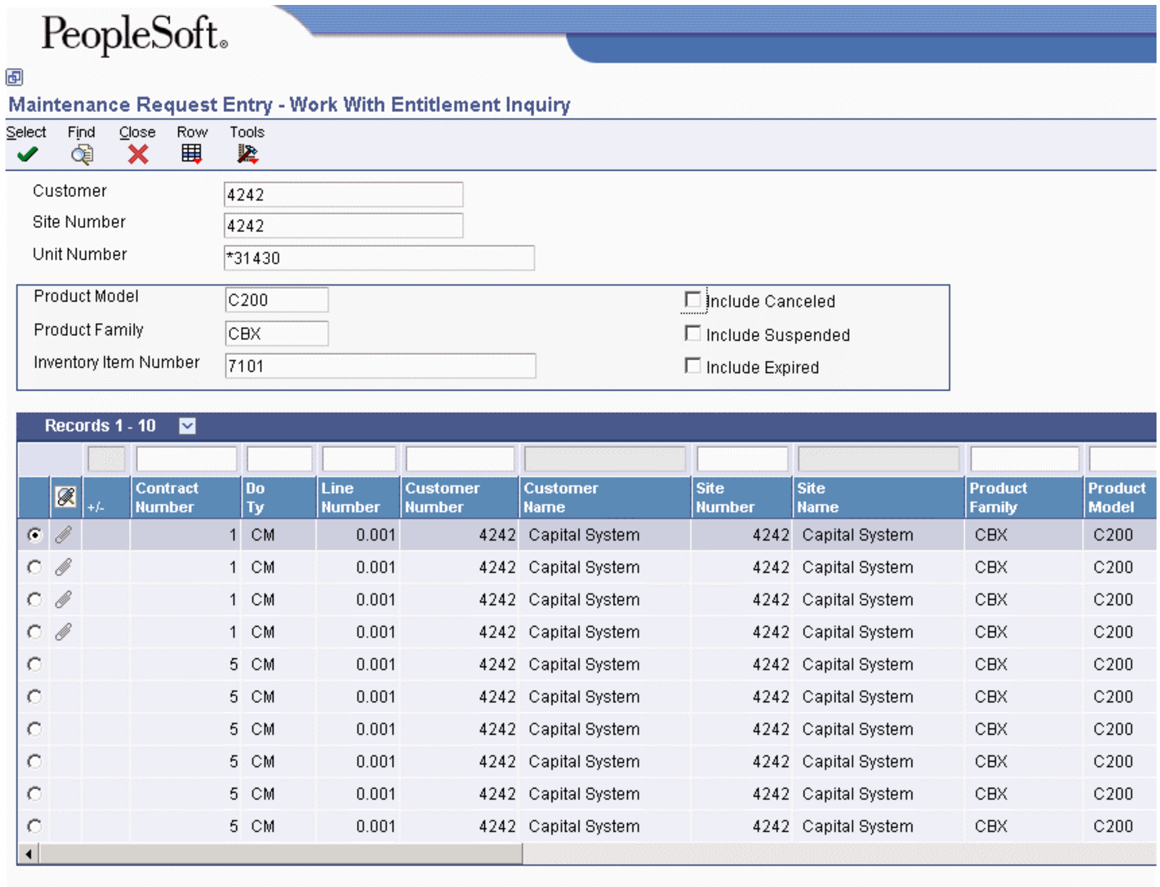
Note

After you review product and model information, you can also review customer entitlements.

You can review the details of a customer contract or warranty agreement to determine whether a customer is entitled to receive customer support services and the services to which the customer is entitled. For example, a customer contract might specify that the customer receives support from 7:00 AM until 6:00 PM Eastern Standard Time.

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work with Maintenance Requests, choose the desired maintenance request and click Select.
2. On Maintenance Request Entry, click the Entitlement icon.


PeopleSoft.

Maintenance Request Entry - Work With Entitlement Inquiry

Select Find Close Row Tools

Customer 4242

Site Number 4242

Unit Number *31430

Product Model C200

Product Family CBX

Inventory Item Number 7101

Include Canceled

Include Suspended

Include Expired

Records 1 - 10

		+/-	Contract Number	Do Ty	Line Number	Customer Number	Customer Name	Site Number	Site Name	Product Family	Product Model
			1	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			1	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			1	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			1	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			5	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			5	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			5	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			5	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			5	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200
			5	CM	0.001	4242	Capital System	4242	Capital System	CBX	C200

3. On Work With Entitlement Inquiry, review the information.
4. If you need to override entitlement information on the maintenance request:
    1. Click Close to return to Maintenance Request Entry.
    2. From the Form menu, choose Entitlements and then choose Inquiry.
    3. On Work With Entitlement Inquiry, make the changes and click Select.
5. If you need to review contract information, click the Accounting tab on Maintenance Request Entry.

Working with Maintenance Request Tasks

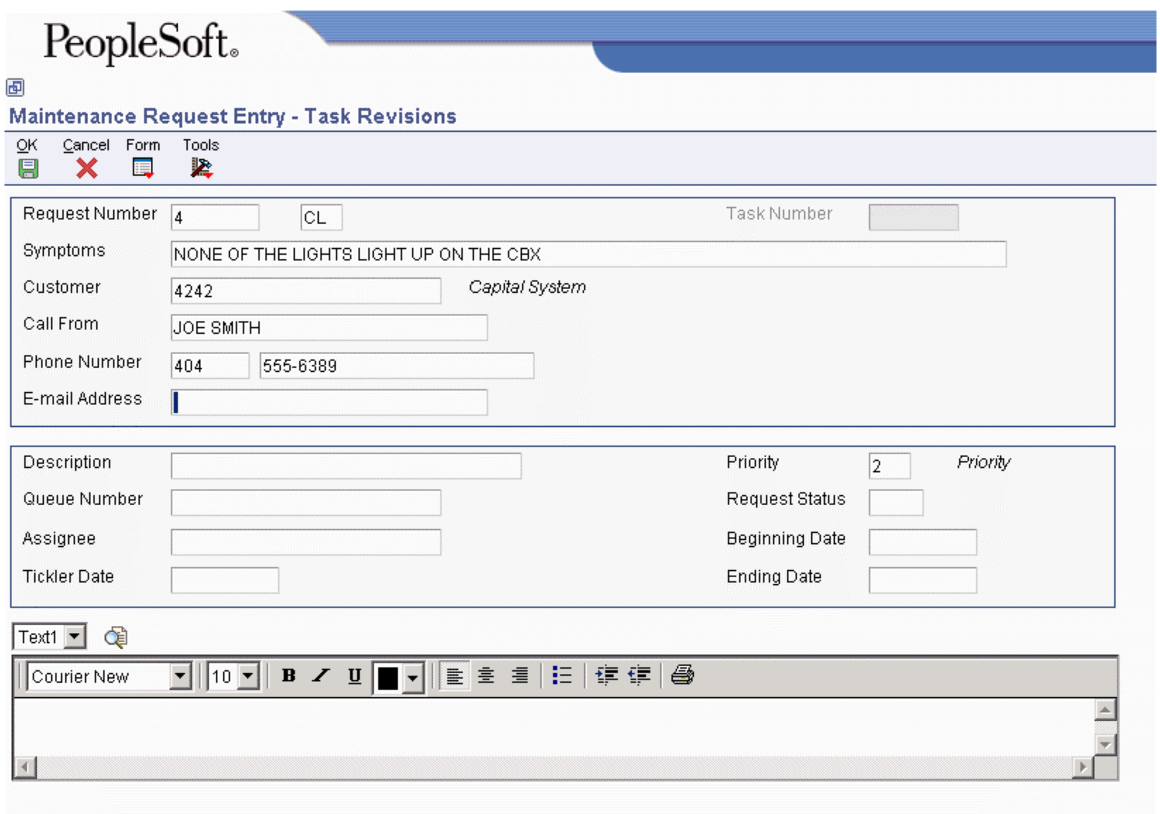
You cannot assign the same maintenance request issue to multiple users. However, you can assign tasks for the issue, referred to as maintenance request tasks, or tasks, to multiple people and assign issue ownership to one person. You can assign tasks as needed to other users who assist in resolving the issue.

A task is an action that is related to an issue. You can add multiple tasks to the same issue. You can also add an attachment to a task to enter detailed information. When you complete a task, you need to close it. The task and the issue are separate, and you are allowed to close one without closing the other. For example, you can complete a task but keep the issue open.

► To work with maintenance request tasks

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work With Maintenance Requests, locate the maintenance request issue and click Select.
2. On Maintenance Request Entry, choose Tasks from the Form menu, and then choose Add Task.



3. On Task Revisions, complete the following fields and click OK:
   - Description
   - Queue Number
   - Assignee

4. If necessary, add an attachment to enter more detailed information.
5. Click OK.
6. Repeat steps 3 through 5 for each task that you need to add.
7. To close a task, change the code in the following field to indicate that the task is complete and click OK:
   - Request Status

Processing Options for Maintenance Request Entry (P17501)

Display Tab

These processing options specify what information the system displays when you enter maintenance requests in this version of Maintenance Request Entry. For example, after you enter a maintenance request, the system can display equipment information that is based on the Customer Number that you enter. Based on the Customer Number, you can indicate whether you want the system to display a search and select window for you to select a caller. After you enter a maintenance request and click OK, you can choose to display routing information for your review.

---

1. Routing Information

Blank = Do not display
1 = Display

Use this processing option to determine whether the system displays the routing information after pressing the OK button.

Valid values are:

Blank Hide routing information.

1 Display routing information.
2. Equipment Information

Blank = Do not display
1 = Display

Use this processing option to determine whether the system displays the equipment information when the Customer Number is entered.
Valid values are:
Blank Do not display equipment information.
1 Display equipment information.

---

3. Who's Who Search/Select

Blank = Do not display

1 = Display

Use this processing option to determine whether the Who's Who Search and Select appears when you move past the Customer Number field and the Caller Name field is blank.

Valid values are:

Blank   Do not display the Who's Who Search and Select form,

1   Display the Who's Who Search and Select form.

4. Billing Information

Blank = Do not display

1 = Display

Use this processing option to specify whether the system displays the Billing Information form when you add a new maintenance request. Valid values are:

Blank

Do not display the Billing Information form.

1

Display the Billing Information form.

Versions Tab

These processing options specify the versions that the system uses when you are inquiring on additional information about the maintenance requests using the Form exits from Maintenance Request Entry.

1. Work With Previous Customer Maintenance Requests (P17500) Version

Blank = ZJDE0002

Use this processing option to specify the version of the Work With Maintenance Requests program (P17500) that the system uses for customer maintenance requests. If you leave this processing option blank, the system uses the ZJDE0002 version.

2. Work With Previous Product Maintenance Requests (P17500) Version

Blank = ZJDE0003

Use this processing option to specify the version for the Work With Maintenance Requests program (P17500) that the system uses for product maintenance requests. If you leave this processing option blank, the system uses the ZJDE0003 version.

3. Maintenance Request History (P17500) Version

Blank = ZJDE0004

Use this processing option to specify the version of the Work With Maintenance Requests program (P17500) that the system uses for the maintenance request history. If you leave this processing option blank, the system uses the ZJDE0004 version.

4. Work With Tasks (P17504) Version

Blank = ZJDE0001

Use this processing option to define the version that the system uses when you choose Work with Tasks from the Row menu. If you leave this option blank, the system uses ZJDE0001.

5. Time Entry (P17505) Version

Blank = ZJDE0001

Use the processing option to define the version of Time Entry (P17505) that the system uses when you choose the form exit for Time Entry. If you leave this option blank, ZJDE0001 is used.

6. Maintenance Request Master Business Function (P1700140) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Maintenance Request MBF (P1700140) that the system uses to process the data. If you leave this processing option blank, the system uses the ZJDE0001 version.

7. Return Material Authorizations Revisions (P400511) Version

Blank = ZJDE0001

Use this processing option to define the version of Return Material Authorizations Revisions (P400511) that the system uses when you choose the Customer form exit for Return Material Authorizations (RMA) transactions. If you leave this option blank, ZJDE0001 is used.

8. Quick Customer/Contact Add (P01015) Version

Blank = ZJDE0001

Use this processing option to define the version of Quick Customer/Contact Add (P01015) that the system uses to add a contact. When you choose the Customer form exit to access address book information, you can add a contact by way of Quick Add or Contact One and Contact Two. If you leave this option blank, ZJDE0001 is used.

9. Address Book Revisions (P01012) Version

Blank = ZJDE0001

Use this processing option to specify the version that the system uses for Address Book Revisions (P01012) when you choose Customer from the Form menu. If you leave this field blank, the system uses ZJDE0001.

10. Customer Master (P03013) Version

Blank = ZJDE0001

Use this processing option to specify the version that the system uses for Customer Master Information (P03013) when you chooses Receivables from the Form menu. If you leave this option blank, the system uses ZJDE0001.

11. Customer Ledger Inquiry (P03B2022) Version

Blank = ZJDE0001

Use this processing option to define the version of Customer Ledger Inquiry (P03B2022) that the system uses when you choose the Receivables form exit for customer ledger inquiry. If you leave this option blank, ZJDE0001 is used.

12. Vendor Master (P04012) Version

Blank = ZJDE0001

Use this processing option to define the version of Vendor Master (P04012) that the system uses when you choose the Payables form exit for vendor inquiry information. If you leave this option blank, ZJDE0001 is used.

13. A/P Standard Voucher Entry (P0411) Version

Blank = ZJDE0001

Use this processing option to define the version of the A/P Standard Voucher (P0411) program that the system uses when you choose the Payables form exit to inquire on accounts payable information. If you leave this option blank, ZJDE0001 is used.

14. Payment Inquiry (P0413M) Version

Blank = ZJDE0001

Use this processing option to define the version of Payment Inquiry (P0413M) that the system uses when you choose the Payables form exit for payment information. If you leave this option blank, ZJDE0001 is used.

15. Eligibility (P08334) Version

Blank = ZJDE0001

Use this processing option to define the version of Eligibility (P08334) that the system uses when you choose the form exit for eligibility. If you leave this option blank, ZJDE0001 is used.

16. Employee DBA Instructions (P050181) Version

Blank = ZJDE0001

Use this processing option to define the version of Employee DBA Instructions (P050181) that the system uses when you choose the Customer form exit for human resources information. If you leave this option blank, ZJDE0001 is used.

17. Employee Profile (P060116) Version

Blank = ZJDE0001

Use this processing option to define the version of Employee Profile (P060116) that the system uses when you choose the Customer form exit for human resources to access employee profile information. If you leave this option blank, ZJDE0001 is used.

18. Work With Employee (P0801) Version

Blank = ZJDE0001

Use this processing option to define the version of Work with Employee (P0801) that the system uses when you choose the Customer form exit for Human Resources to access Work With Employee. If you leave this option blank, ZJDE0001 is used.

19. Sales Order Entry (P4210) Version

Blank = ZJDE0006

Use this processing option to define the version of Sales Order Entry (P4210) that the system uses when you choose the Customer form exit for sales orders in inquire on customer service. If you leave this option blank, ZJDE0006 is used.

20. Supply and Demand Inquiry (P4021) Version

Blank = ZJDE0001

Use this processing option to define the version of Supply and Demand Inquiry (P4021) that the system uses when you choose the Customer form exit for Sales Orders to access supply and demand information. If you leave this option blank, ZJDE0001 is used.

21. Inquiry by Equipment (P48201) Version

Blank = ZJDE0002

Use this processing option to define the version of Inquiry by Equipment (P48201) when you choose the Customer form exit for Service Orders to inquire by equipment information. If you leave this option blank, ZJDE0002 is used.

22. Work Order Revisions (P17714) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Work Order Revisions program (P17714). If you leave this processing option blank, the system uses the ZJDE0001 version.

23. Work With RMA (P40051) Version

Blank = ZJDE0001

Use this processing option to define the version of Work with RMA (P40051) that the system uses when you choose the Customer form exit for Return Material Authorization (RMA) transactions. If you leave this option blank, ZJDE0001 is used.

24. Supplemental Data - Customer (P00092) Version

Blank = ZJDE0003

Use this processing option to define the version of Supplemental Data - Customer (P00092) that the system uses when you choose the Supplemental Data form exit for customers. If you leave this option blank, ZJDE0003 is used.

25. Supplemental Data - Item (P00092) Version

Blank = ZJDE0001

Use this processing option to define the version of Supplemental Data - Item (P00092) that the system uses when you choose the Supplemental Data form exit for items. If you leave this option blank, ZJDE0001 is used.

26. Supplemental Data - Work Order (P00092) Version

Blank = ZJDE0007

Use this processing option to specify the version for the Supplemental Data - Work Order program (P00092). If you leave this processing option blank, the system uses the ZJDE0007 version.

27. Supplemental Data - Sales Order (P00092) Version

Blank = ZJDE0018

Use this processing option to define the version of Supplemental Data - Sales Orders (P00092) that the system uses when you choose the Supplemental Data form exit for orders. If you leave this option blank, ZJDE0018 is used.

28. Equipment Master Inquiry (P1701) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Work With Equipment Master program (P1701) that the system uses when you inquire by customer. If you leave this processing option blank, the system uses the ZJDE0001 version.

29. Equipment Master Revisions (P1702) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Equipment Master Revisions program (P1702). If you leave this processing option blank, the system uses the ZJDE0001 version.

30. Contracts (P1720) Version

Blank = ZJDE0001

Use this processing option to define the version of Contracts (P1720) that the system uses when you choose the Entitlements form exit for contracts. If you leave this option blank, ZJDE0001 is used.

31. Print Maintenance Request (R17674) Version

Blank = XJDE0003

Use this processing option to specify the version of the Print Maintenance Request program (R17674). If you leave this processing option blank, the system uses the XJDE0003 version.

32. Maintenance Request Workfile Generation (R17675) Version

Blank = XJDE0001

Use this processing option to specify the version of the Maintenance Request Workfile

Generation program (R17675). If you leave this processing option blank, the system uses the XJDE0001 version.

33. Service Billing Inquiry (P4812) Version

Blank = ZJDE0001

Use this processing option to specify the version of Service Billing Inquiry (P4812) that the system uses when you choose Billing from the form menu. If you leave this option blank, ZJDE0001 is used.

34. Failure Analysis Tree Search and Select (P17763S) Version

Blank = ZJDE0001

Use this processing option to specify which version of the Failure Analysis Tree Search & Select program (P17763S) the system uses when searching for failure analysis trees. If you leave this processing option blank, the system uses the default version ZJDE0001.

35. Work with Failure Analysis (P17766) Version

Blank = ZJDE0001

Use this processing option to specify which version of the Work with Failure Analysis program (P17766) the system uses. If you leave this processing option blank, the system uses the default version ZJDE0001.

36. Failure Analysis (P17767) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Failure Analysis program (P17767) the system uses. If you leave this processing option blank, the system uses the default version ZJDE0001.

37. Failure Analysis Search and Select (P17768) Version

Blank = ZJDE0001

Use this processing option to specify which version of the Failure Analysis Search & Select program (P17768) the system uses. If you leave this processing option blank, the system uses the default version ZJDE0001.

Process Tab

These processing options specify the processing that the system performs for this version of Maintenance Request Entry. For example, you can specify whether maintenance requests are entered in a self-service environment and where the system places the date/time stamp on the maintenance request.

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1. Copy the text

Blank = No text is copied when copying the existing maintenance request

1 = The text is copied when copying the existing maintenance request

Use this processing option to specify whether the system copies media object text when you copy a maintenance request. Valid values are:

Blank

Do not copy media object text.

1

Copy media object text.

2. Date/Time stamp

Blank = Date/Time stamp is on the top of the comments

1 = Date/Time stamp is at the bottom of the comments

Use this processing option to determine where the Date/Time Stamp is printed in the comments area. You can choose to have the date/time stamp precede your comments (at the top) or after your comments (at the bottom).

Valid values are:

Blank Print the date/time stamp on top of comments.

1 Print the date/time stamp at the bottom of comments.

3. Customer Self-Service

Blank = Bypass Customer Self-Service

1 = Activate Customer Self-Service for use in Java/HTML

2 = Activate Customer Self-Service for use in Windows

Use this processing option to specify how the system uses this version of the Work With Maintenance Requests program (P17500) with Customer Self-Service features. Valid values are:

Blank

Do not activate Customer Self-Service features.

1
Activate Customer Self-Service features for use in Java/HTML.

2
Activate Customer Self-Service features for use in Windows.

Self Service Tab

1. Enable Customer Number

Blank = Not enable customer number field
1 = Enable customer number field

Use this processing option to specify whether to enable the customer number field on the Customer Self Service (CSS) form. Valid values are:

Blank
Do not enable the customer number field.

1
Enable the customer number field.

2. Default Customer Number

Blank = Not default the customer number
1 = Default the customer number

Use this processing option to specify whether, when you create a customer self-service maintenance request, the system enters the user address book number as the default for the customer number field on the Customer Self Service form. Valid values are:

Blank
Do not enter a default customer number.

1
Enter the user address book number as the customer number.

What You Should Know About Processing Options for Maintenance Request Entry (P17501)

Accessing processing options for P17501

To access these processing options, type IV (Interactive Versions) in the Fast Path. On Work With Interactive Versions, enter the program number and click Find. Locate the version and choose Processing Options from the Row menu.

Processing Options for Maintenance Request MBF (P1700140)

Defaults Tab

These processing options specify the defaults that the system uses when you enter a maintenance request using this version of Maintenance Request MBF (Master Business Function) Processing Options (P1700140). You can set the defaults in the processing options for information that remains the same for most maintenance requests, such as document type, caller and customer name, and assignee. In this way, you can enter maintenance requests more efficiently. If you set defaults in the processing options, you can override the default information on the Maintenance Request Entry form.

1. Document Type

Blank = CL

Use this processing option to specify the document type for the maintenance request. Enter a valid value from UDC 00/DT (Document Type).

2. Failure Description

Blank = Failure Description is not defaulted from the first line of the media object text.
1 = Failure Description is defaulted from the first line of the media object text.

Use this processing option to specify whether the symptoms information is automatically filled in using the first line of the media object text.

Valid values are:

Blank Do not use the first line of the media object text.

1 Use the first line of the media object text as the symptom.

3. Caller Name

Blank = Do not default Caller Name from Customer Name

1 = Default Caller Name from Customer Name

Use this processing option to indicate whether the system uses the Customer Name as the Caller Name.

Valid values are:

Blank Do not use the customer's name as the caller name.

1 Use the customer name as the caller name.

4. Assignee

Blank = Do not default Assigee from the User

1 = Default Assignee from the User

Use this processing option to determine whether the system uses the user ID as the default assignee.

Valid values are:

Blank Do not use the user ID as the default for the assignee.

1 Use the user ID as the default for the assignee.

5. Reporting Codes

Blank = Do not default the reporting codes of the Assignee from the S/WM Service Provider information

1 = Default the reporting codes of the Assignee from the S/WM Service Provider information

Use this processing option to specify whether the system uses the reporting codes of the assignee from the S/WM Address Book Information table (F1797). Valid values are:

Blank

Do not use reporting codes from the S/WM Address Book Information table.

1

Use reporting codes from the S/WM Address Book Information table.

6. Phone Number Type for the fax number

Use this processing option to define the phone number type for fax number. This is user

defined code (01/PH) that indicates the use of the phone number.
7. Status for a maintenance request is assigned

Use this processing option to specify the default status when the system assigns the maintenance request. Enter a value from UDC 17/ST.

8. Queue

Note: This queue will override the queue from the routing rules.

Use this processing option to indicate the default queue number. The queue number that you enter in this processing option overrides the queue from routing rules.
9. Request Type

Blank = Default from Data Dictionary

Use this processing option to specify the maintenance request type that the system uses as a default for the Work With Maintenance Requests program (P17500).

Enter a value from UDC 17/CT. If you leave this processing option blank, the system uses the default value from the data dictionary.

10. Cost Type

Blank = B1 (Direct Labor)

If you are billing for calls and the pricing method is flat rate, use this processing option to specify the default cost type. Typically, enter B1 (Direct Labor) as the default, or you can enter another valid value from UDC 30/CA (Cost Component Add-Ons).
11. Pricing Units

Blank = 0

If you are billing for calls and the pricing method is flat rate, use this processing option to specify the default pricing units on calls. Pricing units are quantities that the system uses to retrieve advanced pricing information, such as for price break levels based on quantities. Enter a number or use the default, which is 0 (zero).
12. Pricing Unit of Measure

Blank = EA

Use this processing option to specify the default unit of measure that the system uses to retrieve advanced pricing information. This option is used for billing for maintenance requests in which the pricing method is flat rate.

Enter a valid value from UDC 00/UM (unit of measure). If you leave this processing option blank, the system uses EA (each).

Edits Tab

These processing options specify what information the system verifies when you enter a maintenance request. When you enter a maintenance request, you can automatically perform entitlement checking; or verify dates that a maintenance request can be closed, reopened, or returned, based on these processing options.

1. Entitlement Check

Blank = No entitlement checking performed
1 = Check entitlement with the date table (F1791)
2 = Check entitlement without the date table (F1791)

Use this processing option to specify how the system performs the entitlement check.

Valid values are:

Blank Do not perform entitlement checking.

1 Check the entitlement with the date table (F1791).

2 Check the entitlement without the date table (F1791).
2. Maximum days for reopening a maintenance request

Blank = Cannot reopen maintenance request

Use this processing option to specify the maximum number of days that you can reopen a closed maintenance request. If you leave this processing option blank, you cannot reopen a closed maintenance request.

3. Date/Time Opened

Blank = Original Date/Time Opened is left in the maintenance request
1 = Default Date/Time Opened to current date/time

Use this processing option to specify whether the systen uses the current date and time as the beginning date and time when you reopen a maintenance request. Valid values are:

Blank

The original date and time that the request was opened remain on the maintenance request.

1

The system uses the current date and time as the beginning date and time for the maintenance request.

4. Date/Time Returned

Blank = Original Date/Time Returned is left in the maintenance request

1 = Clear Date/Time Returned when the maintenance request is reopened

Use this processing option to specify whether to clear the date and time when a maintenance request is reopened. Valid values are:

Blank

Leave the original date and time in the maintenance request.

1

Clear the date and time in the maintenance request.

5. Area Code and Phone Number

Blank = Not required

1 = Required

Use this processing option to specify whether the system requires you to enter the area code and phone number when you enter a maintenance request. Valid values are:

Blank

Require the area code and phone number.

1

Do not require the area code and phone number.

6. Reason Code

Blank = Reason Code is not required when closing the maintenance request.

1 = Reason Code is required when closing the maintenance request.

Use this processing option to specify whether to require a reason code when you close a maintenance request. Valid values are:

Blank

Do not require a reason code.

1
Require a reason code.

Process Tab

These processing options specify the processes that the system performs when you use this version of Maintenance Request MBF (P1700140).

1. Protect the Queue Number

Blank = Do not protect
1 = Protect

Use this processing option to indicate whether the queue number can be changed.

Valid values are:

Blank Allow changes to the queue number.

2 Do not allow changes to the queue number.
2. Protect Pricing Method

Blank = Do not protect
1 = Protect

Use this processing option to specify whether the system prevents changes to the pricing method when you create a maintenance request. Valid values are:

Blank
Allow changes to the pricing method.

1
Prevent changes to the pricing method.

Note: If you allow changes to the pricing method, you can choose the flat rate pricing method or the time and materials pricing method.

3. Customer inconsistent with Equipment Master

Blank = No editing

1 = Change the customer number

2 = Automatically update Equipment Master

Use this processing option to specify whether the system verifies that the customer number on the maintenance request matches the customer number on the equipment master. If the customer numbers are different, you can specify whether the system updates the equipment master. Valid values are:

Blank

Do not compare the customer numbers.

1

Display a prompt to update the customer number on the equipment master to match the customer number on the maintenance request.

2

Automatically update the customer number on the equipment master to match the maintenance request customer number.

4. Site inconsistent with Equipment Master

Blank = No editing

1 = Change the site number

2 = Automatically update Equipment Master

Use this processing option to specify whether the system verifies that the site number for the maintenance request matches the equipment master site number. If the site numbers are different, you can specify whether the system updates the equipment master. Valid values are:

Blank

Do not compare the site numbers.

1

Display a prompt to update the site number to the equipment master to match the maintenance request site number.

2

Automatically update the site number to the equipment master to match the maintenance request site number.

5. Validate assignee in queue

Blank = No checking

1 = Set error

2 = Set warning

Use this processing option to determine when the assignee that is entered is set up in the queue.

Valid values are:

Blank Do not check whether assignee is in queue.

1 Display error when assignee is on queue.

2 Display warning when assignee is on queue.

6. Check required fields

Blank = Do not check

1 = Check

Use this processing option to specify whether the system verifies that there is information in the required fields. You define which fields are required in the Required Fields Setup (P1759) program or Status Rules Setup.

Valid values are:

Blank Do not check the required fields.

1 Check the required fields.

7. Bill For Maintenance Requests

Blank = Do not bill for maintenance requests

1 = Bill for maintenance requests

Use this processing option to specify whether to bill for maintenance requests. You must activate this processing option if you need to enter billing information for maintenance requests. Valid values are:

Blank

Do not bill for maintenance requests.

1

Bill for maintenance requests.

Vertex Tab

This processing option specifies the Vertex transaction type for flat rate billing.

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1. Transaction Type for Flat Rate Billings

Blank = SERVIC

Use this processing option to specify the Vertex transaction type that the system uses when calculating taxes for flat rate billing. Use this transaction type only if you are billing for maintenance requests and the pricing method is flat rate.

Enter a valid value from UDC 73/TY (Vertex Transaction Type). If you leave this processing option blank, the system uses transaction type SERVIC.

What You Should Know About Processing Options for Maintenance Request MBF (P1700140)

Accessing processing options for P1700140

To access these processing options, type IV (Interactive Versions) in the Fast Path. On Work With Interactive Versions, enter the program number and click Find. Locate the version and choose Processing Options from the Row menu.

Working with Maintenance Requests

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

You can customize the work space by setting processing options to include only the information with which you are directly working. Some of the available options include maintenance request sequencing, sorting requests by priority or status, and pre-loading information to the work space to limit the information that appears. You can also lock requests so that only one consultant at a time can review and change information in a request.

Understanding Locked Maintenance Requests

Through record locking, you can lock maintenance requests to ensure that changed information in a request is not inadvertently overridden by another consultant. Use the UDC 00/RR (Object In Use Application ID) to activate record locking for the Maintenance Request Entry program (P17501). This UDC activates record locking in specific applications and allows only one person at a time to access a record.

If you set up record locking, the system displays the maintenance requests that are currently in use. The user ID of the person who is accessing the file appears in the Reserved By column.

Note

To set this user defined code to activate record locking, the first character of the special handling code must be 1. If you do not want to perform record locking, the first character of the special handling code must be 0.

Field Information

By Time Zone

By choosing this option, the system uses the service provider's time to calculate the current customer time. If the current customer time is outside of the standard business hours of the service provider, the system does not display the maintenance request.

Total Elapsed Hours

Elapsed time is the difference between the current date and time (or completed date and time) and the date and time when the maintenance request was entered. The elapsed time is rounded to the nearest quarter hour. The workday calendar defined for the queue calculates the number of workdays. The time is then converted to hours.

Time Remaining

This field is the difference between the current date and time and the commitment date and time. The time remaining is rounded to the nearest quarter hour. The workday calendar that is defined for the queue calculates the number of workdays. The time is then converted to hours. Any time remaining appears in red. Time is only calculated if the returned date and time field is blank. If no commitment date and time exist, the time remaining is zero.

Reserved By

If you set up record locking, you can review the maintenance requests that are currently in use and the user ID of the person who is accessing the file.

If you try to access a maintenance request that is in use, the system notifies you that the maintenance request is locked and displays the user ID of the person working in the file.

If you do not have record locking activated, the column is blank.

Processing Options for Work With Maintenance Requests (P17500)

Display Tab

The processing options on this tab indicate the information that the system displays when you inquire on maintenance requests using this version of Work With Maintenance Requests. For example, you can set up these processing options so that the system only displays those maintenance requests within a status range based on a time zone, call back time, country code, and language .

1. Time Zone Filter

Blank = Do not verify

1 = Verify

Use this processing option to specify whether the system verifies the time zone of the customer. The system displays maintenance requests based on time zones. Valid values are:

Blank

Bypass the time zone filter.

1

Check the time zone filter.

If you choose to check the time zone and then set the processing option to verify a call back time, the system verifies whether the customer time is outside of your business hours. If the customer time is outside of your business hours, the system does not display the maintenance requests.

2. Starting Call Back Time

Use this processing option to specify the call-back time by which to filter maintenance requests. Enter the call-back time in military time, using hours, minutes, and seconds, such as 090000 for 9:00 A.M. or 150000 for 3:00 P.M.

If the customer time is earlier than the time that you indicate here, and if the By Time Zone option on the Work With Maintenance Requests form is turned on, then the system does not display the maintenance requests.

If you choose to check the time zone and also set the processing option to verify a call-back time, the system verifies whether the customer time is earlier than the current time. If the customer time is earlier than the current time, the system does not display the maintenance requests.

3. Country Code

Blank = Do not display as Selection Criteria

1 = Display as Selection Criteria

Use this processing option to specify whether the system displays the country code field for selection criteria. Valid values are:

Blank

Hide the country code field.

1

Display the country code field.

If you choose to display country codes, you can specify selection criteria that the system uses to display maintenance requests. To specify which country code the system uses as a default, set the Default Country Code processing option.

4. Language

Blank = Do not display as Selection Criteria
1 = Display as Selection Criteria

Use this processing option to specify whether to display the language field. Valid values are:

Blank
Hide the language field.

1
Display the language field.

If you choose to display languages, you can specify selection criteria that the system uses to display maintenance requests. To specify which language the system uses as a default, set the Default Language processing option.

5. From status

Use this processing option to specify the From Status. The system displays only those maintenance requests that match the status specified in the processing options for From Status and Thru Status.

Enter a value from UDC 17/ST.

6. To status

Use this processing option to specify the Thru Status. The system displays only those maintenance requests that match the status specified in the processing options for From Status and Thru Status.

Enter a value from UDC 17/ST.

7. Number of days to use for date filter

Blank = Date From/Thru are not pre-loaded

Use this processing option to specify the number of days that the system uses to calculate the From date and Thru date. The system displays maintenance requests only within this date range. If you leave this processing option blank, the system does not calculate filter dates.

8. Priority column

Blank = Display without color coding

1 = Display with color coding

Use the processing option to specify whether the system displays priority with color. The color setup is defined in the user defined code (17/PR) in the Special Handling column.

Valid values are:

Blank Display priority without color.

1 Display priority with color.

9. CTI Interface

Blank = Do not display CTI Interface

1 = Display CTI Interface

Use this processing option to specify whether the system displays the CTI Interface.

Valid values are:

Blank Hide the CTI Interface.

1 Display the CTI Interface.

10. In Use maintenance requests

Blank = Display maintenance requests

1 = Do not display maintenance requests

Use this processing option to specify whether the system displays the locked maintenance requests. The system locks maintenance requests that are in use so that only one person at a time can access the information. Valid values are:

Blank

Display the locked maintenance requests.

1

Do not display the locked maintenance requests.

Defaults Tab

The processing options on this tab define the defaults that the system uses when you inquire on maintenance requests. While you can override these values to search for maintenance requests, you can specify defaults that are standard to most requests that you inquire on in this version of Work with Maintenance Requests, such as country code, language code, assignee, and maintenance request queue.

1. Country Code

Use this processing option to specify the country code for maintenance requests. Enter a value from UDC 00/CN.

Note: To display country codes, you must also set the Display Country Code processing option on the Display tab.

2. Language

Use this processing option to specify the language for maintenance requests. The system displays only maintenance requests that specify this language preference. Enter a value from UDC 01/LP.

Note: To display languages, you must also set the Display Language processing option on the Display tab.

3. Assignee

Blank = Do not default user as assignee
1 = Default user as assignee

Use this processing option to specify the user as the default assignee. The system displays maintenance requests that are assigned to the user. Valid values are:

Blank
Do not use the user as the default assignee.

1
Use the user as the default assignee.

4. Queue

0 = Do not default a queue
Specific queue = Default queue

Use this processing option to specify the default maintenance request queue on the selection criteria. The system displays only requests that are assigned to this queue.

Versions Tab

The processing options on this tab define the versions that the system accesses when you take Row and Form exits from the Work With Maintenance Requests form, using this version of Work With Maintenance Requests.

---

1. Maintenance Request Entry (P17501) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Maintenance Request Entry program (P17501) that the system uses when you add a new maintenance request or select a specific request to review. If you leave this processing option blank, the system uses the ZJDE0001 version.

2. Supplemental Data (P00092) Version

Blank = ZJDE0003

Use the processing option to define the version of Supplemental Data (P00092) that the system uses when you choose the form exit, Supplemental Data. If you leave this option blank, ZJDE0003 will be used.

3. Work With Tasks (P17504) Version

Blank = ZJDE0001

Use this processing option to define the version of Work with Tasks (P17504) that the system uses when you choose the row exit, Work with Tasks. If you leave this option blank, ZJDE0001 will be used.

4. Work Center (P012501) Version

Blank = ZJDE0005

Use this processing option to define the version of Work Center (P012501) that the system uses when you choose the form exit, Work Center. If you leave this option blank, ZJDE0005 will be used.

5. Print Maintenance Request (R17674) Version

Blank = XJDE0003

Use this processing option to specify the version of the Print Maintenance Request program (R17674) that the system uses to generate maintenance requests. If you leave this processing option blank, the system uses the XJDE0003 version.

6. Work with Failure Analysis (P17766) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Work with Failure Analysis program (P17766). If you leave this processing option blank, the system uses the ZJDE0001 version.

---

7. Failure Analysis (P17767) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Failure Analysis program (P17767). If you leave this processing option blank, the system uses the ZJDE0001 version.

Process Tab

The processing options on this tab define the processing that the system performs for this version of Work with Maintenance Requests. If you activate this processing option, you can use this version for Customer Self-Service for your Web-based solution.

1. Customer Self-Service

Blank = Bypass Customer Self-Service

1= Activate Customer Self-Service for use in Java/HTML

2 = Activate Customer Self-Service for use in Windows

Use this processing option to specify how the system uses this version of the Work With Maintenance Requests program (P17500) with Customer Self-Service functionality. Valid values are:

Blank

Do not activate Customer Self-Service functionality.

1

Activate Customer Self-Service functionality for use in Java/HTML.

2

Activate Customer Self-Service functionality for use in Windows.

What You Should Know About Processing Options for Work With Maintenance Requests (P17500)

Accessing processing options for P17500 To access these processing options, type IV (Interactive Versions) in the Fast Path. On Work With Interactive Versions, enter the program number and click Find. Locate the version and choose Processing Options from the Row menu.

Working with Computer Telephony Integration

Computer Telephony Integration (CTI) is an interface between a telephone system and the Maintenance Request programs. Using CTI, a computer can accept incoming maintenance requests and route them to the appropriate device or person.

Setting Up Computer Telephony Integration Properties

Set up Computer Telephony Integration (CTI) properties to connect your system applications to the telephony driver. The properties allow you to recreate a keypad for telephone functions.

► To set up CTI properties

From the Maintenance Request Setup menu (G1743), choose CTI Properties.

1. On Work With CTI Properties, click Add.

2. On CTI Properties Revisions, complete the following fields and click OK:

   - Address Number
   - Agent ID
   - ACD Number

Using Computer Telephony Integration

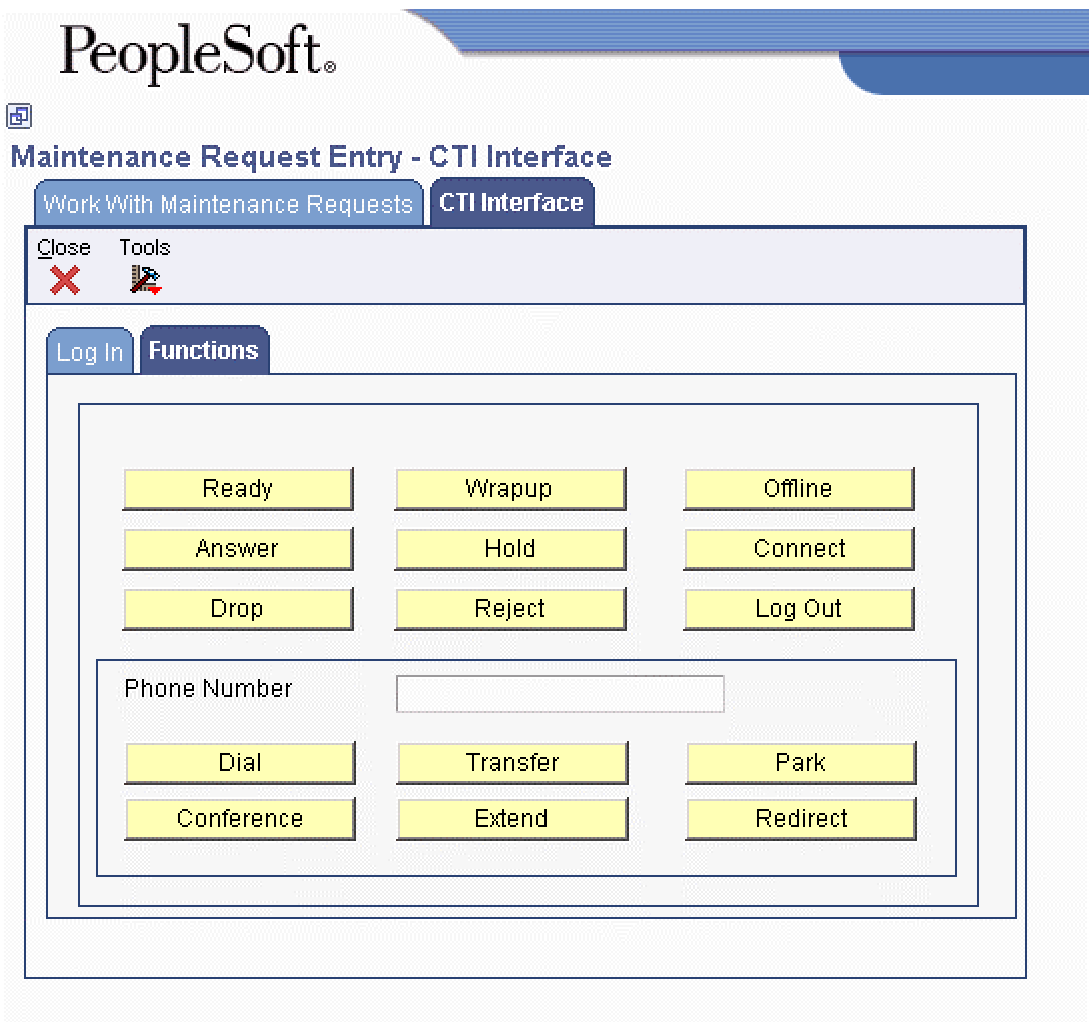
When you use Computer Telephony Integration (CTI), you sign on to the telephone system and access your maintenance requests through the Maintenance Request Entry program. You are able to access the CTI interface as well as the maintenance request interface to perform your duties.

Depending on how you have set your processing options in Work With Maintenance Requests (P17500), the system automatically displays the CTI interface as you access the Maintenance Request Entry program.

► To use computer telephony integration

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

On the Work With Maintenance Requests form, choose CTI from the Form menu.



Resolving Maintenance Requests

Resolving maintenance requests includes everything from finding an answer to the customer's inquiry or problem to entering a work order because the issue requires further support. An issue remains in open status until the issue has been resolved. When you resolve the issue, and to allow for accurate reporting, you need to change the status to closed. To report your time, you can access time entry as you are closing an issue if processing is set up to do so in the queue statuses.

Searching for Customer Issues and Solutions

The Failure Analysis programs provide a database of issues and resolutions. You can search this database to find an issue that is similar to yours and view the attached resolution.

The system searches for failures and reporting codes. You can add new failures and resolutions, or attach information to existing failures and resolutions.

See Also

- If you do not find a failure record that you need, see *Working With Failure Analysis Transactions* in the *Capital Asset Management Guide* or the *Service Management Guide* for information about adding failure records.

► **To search for customer issues and solutions**

Note

The steps for this process are shown as you enter the Failure Analysis program from a maintenance request, but the same steps apply if you enter from a work order.

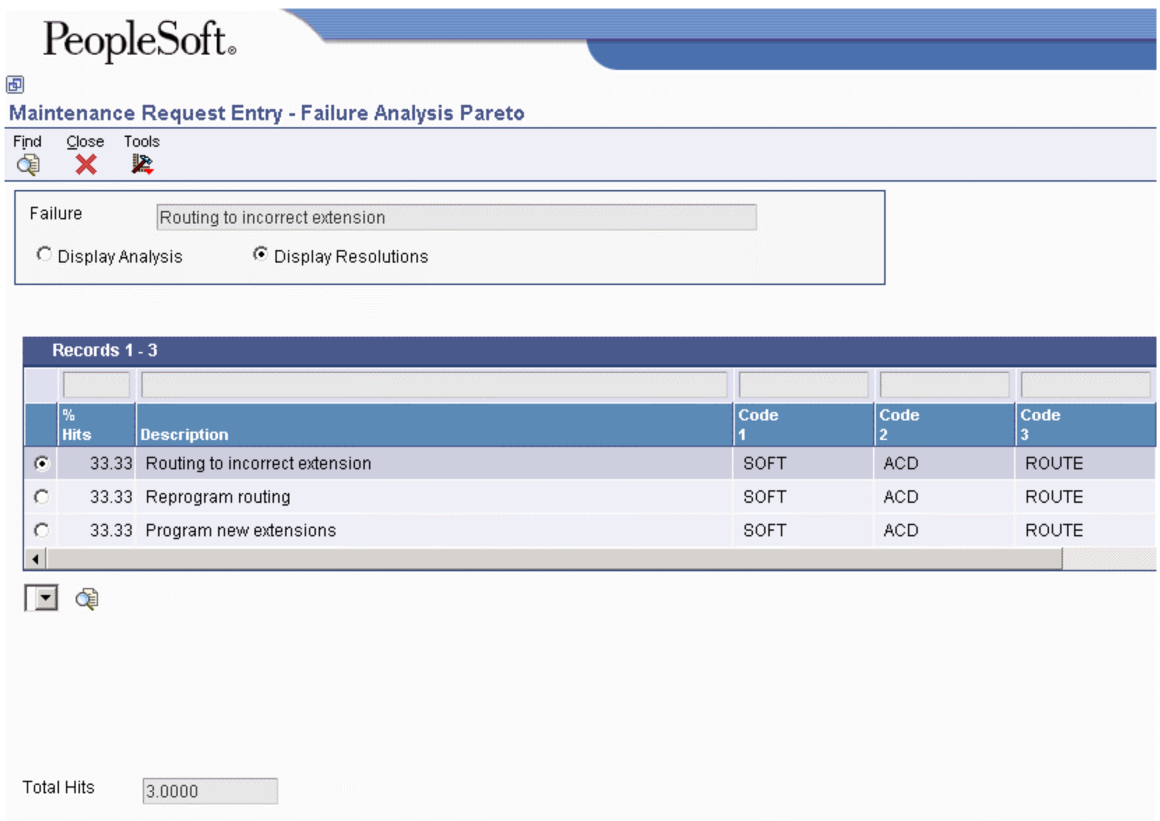
From the Maintenance Request menu (G1713), choose Maintenance Request Entry..

1. On Work With Maintenance Requests, choose Failure Analysis from the Form menu.
2. On Work with Failure Analysis, complete any of the optional fields in the header area to narrow your search and click Find.
3. Choose one of the following actions:
    - To review detail for a single failure, analysis, or resolution, go to step 4.
    - To review a failure, analysis, and resolution for a work order or maintenance request, go to step 6.
    - To review attached pareto information for a record, go to step 8.
4. To review detail for a single failure, analysis, or resolution, locate and choose a record; then choose Single Revisions from the Row menu.
5. On Failure Analysis Revisions, review the information about the issue, click OK, and go to step 11.
6. To review detail for a work order or maintenance request, locate and choose a record, and then choose F/A/R Revisions from the Row menu.

7. On Failure Analysis Revisions, review the information for the work order or maintenance request, click OK, and go to step 11.
8. To review pareto analysis information, locate and choose a record, and then choose Pareto Analysis from the Row menu.

Notes

- The Pareto Analysis row exit is only available when pareto analysis information exists for the particular failure or analysis record that is selected.
- A failure record can have both analysis and resolution pareto information. An analysis record can have resolution pareto information. A resolution record does not have any pareto information.



9. On Failure Analysis Pareto, choose one of the following options and click Find:
   - Display Analysis
   - Display Resolutions

   These options determine whether the system displays an analysis that is attached to a failure or a resolution that is attached to a failure or analysis.
10. Review the information, and then click Close.
11. On Work with Failure Analysis, click Close.

Entering Work Orders Using Maintenance Requests

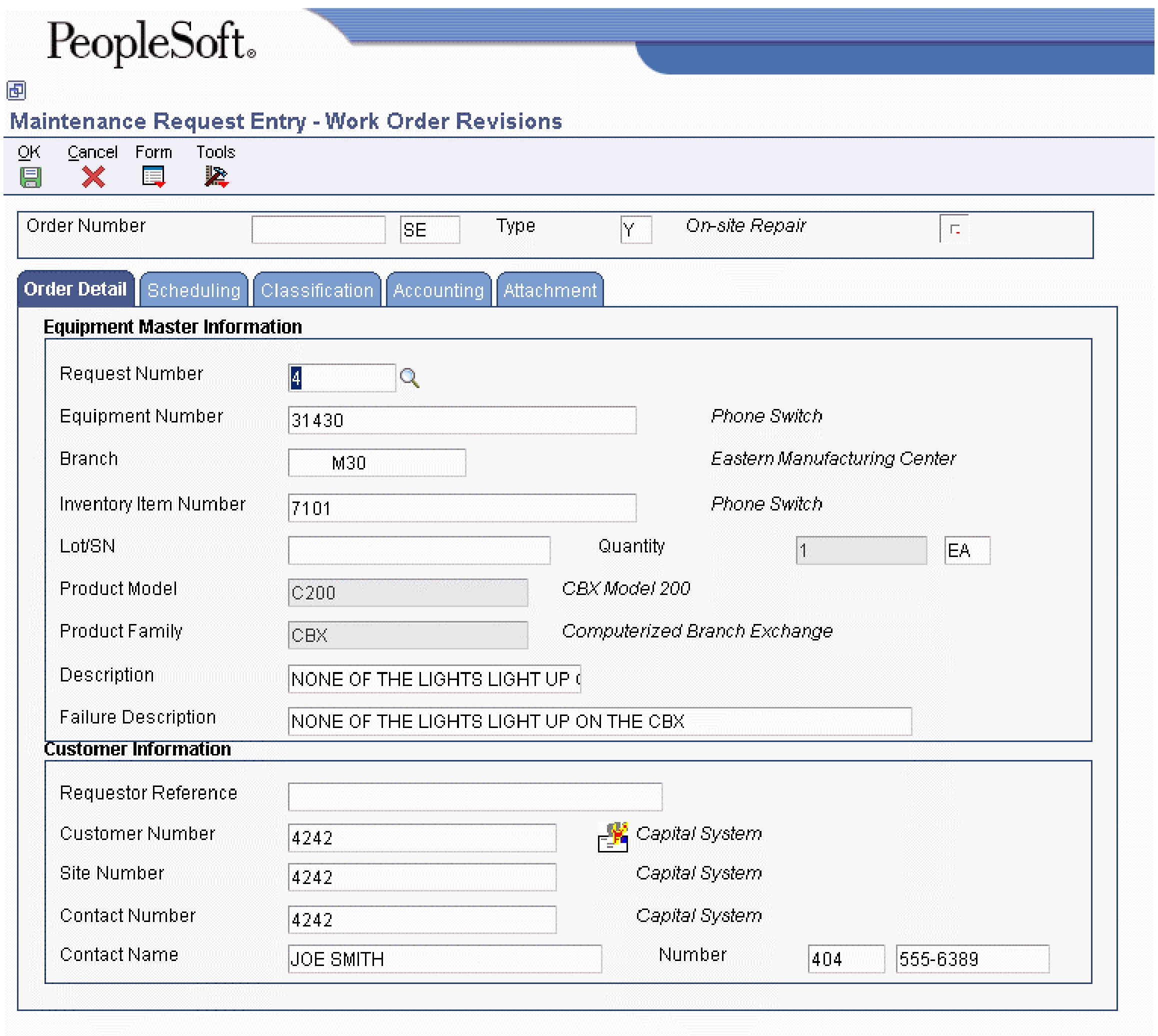
Enter work orders to track requests for on-site or in-house repair, and to track shipments of replacement parts.

Depending on the nature of the customer request, you must first open a maintenance request and then create the work order, or you can create a work order that is not attached to an open maintenance request. If a request cannot be resolved by a consultant or if a replacement part is required, you can create a work order.

► To enter work orders using maintenance requests

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work With Maintenance Requests, locate and choose the maintenance request and click Select.
2. On Maintenance Request Entry, choose Work Orders, and then choose Revise from the Form menu.



3. On Work Order Revisions, review the information and make any changes as necessary.

   The system enters information from the equipment record as default information. The system also checks entitlement for the customer.

4. Click OK.

   The system uses Next Numbers to assign a work order number unless you override the information.

Closing Issues

When you resolve a issue, you need to change the status of the issue to close it.

After you close the issue, you might need to enter your time entry information to bill the customer accurately.

Note

Depending on how your system is set up, the status of the issue might not require you to manually change the code to closed. Instead, the system might close the issue.

► **To close issues**

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work With Maintenance Requests, locate and choose the maintenance request and click Select.
2. On the Caller tab of Maintenance Request Entry, enter the code that indicates that the issue is resolved in the following field and click OK:

   - Request Status

   The system updates the time and date when the issue is completed. If you set your status rules to display time entry or failure analysis, the system automatically displays these forms.

Charging Time to Issues

When you resolve an issue, you need to enter your time to accurately capture the amount of time spent on the issue for billing purposes. If you have contract and warranty agreements with customers who do not require billing by the hour, you still might need to report the time for accounting purposes. You can set your processing options to create either payroll batch transactions or G/L transactions.

Setup options determine which stages of an issue require time entry. You can set up your system to display the time entry form at any status change or only when the maintenance request is closed.

When you enter an issue, the system calculates time entry information based on the time when you access the Maintenance Request Entry form and the time when you exit the form. You can override the information, if necessary.

The three methods for using the Maintenance Request Time Entry program are:

- With maintenance request billing turned off (enter time for reporting purposes only)
- With maintenance request billing turned on, flat rate pricing method
- With maintenance request billing turned on, time and materials pricing method

The fields vary on the Maintenance Request Time Entry form, depending on which method you use. When maintenance request billing is turned off, the fields are identical to flat rate billing except that the Uploaded to Table and Date Uploaded fields do not appear.

Note

If the maintenance request has already been billed, you cannot change the billing information.

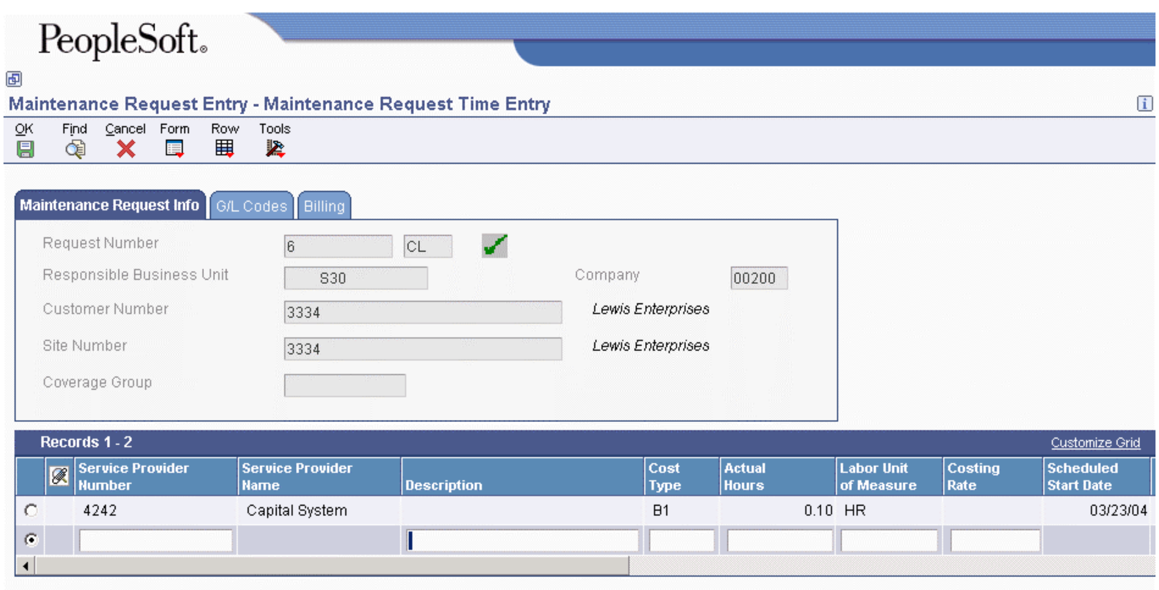
Prerequisite

- ❑ To access billing information and enter billable time, you must activate the Bill for Maintenance Requests processing option for Maintenance Requests MBF (P1700140).

▶ To charge time to issues

From the Maintenance Request menu (G1713), choose Maintenance Request Entry.

1. On Work With Maintenance Requests, locate the maintenance request and click Select.
2. On Maintenance Request Entry, choose Time Entry from the Form menu.



3. On Maintenance Request Time Entry, complete or review the following fields (you can override system defaults):
   - Service Provider Number
   - Cost Type
   - Actual Hours
   - Labor Unit of Measure
   - Costing Rate
   - Scheduled Start Date
   - Start Time
   - End Date
   - End Time
   - Account Number

     The system retrieves the account number based on the account number set up for a service provider or consultant in the SWM service provider address book information.

   - PDBA Code
   - Percentage Covered
4. If you are using the time and materials pricing method, complete or verify the following additional fields:
   - Billable

     To bill for the maintenance request, this field must be set to 1 or Y.

   - P.O. Number
   - Adjustment Schedule
   - Price Effective Date
   - Billable Hours
   - Minimum Billable Hours
   - Billing Rate
   - Minimum Billable Amount
   - Discount Method
   - Discount Percent
   - Discount Amount
   - Taxable
   - Tax Explanation Code
   - Tax Rate/Area
   - Bill To Number
   - Send Invoice To Number
5. Click OK.

   The system uploads the costs of the maintenance request to the tables you set up in the processing options.

Processing Options for Time Entry (P17505)

Process Tab

The processing options on this tab define the processes that the system performs during time entry.

1. Write time entry records

Blank = Only S/WM Time Entry Table (F1760)

1 = General Ledger Batch Table (F0911Z1) and S/WM Time Entry Table (F1760)

2 = Payroll Batch Table (F06116Z1) and S/WM Time Entry Table (F1760)

Use this processing option to specify to which tables the system writes the time entry records. Valid values are:

Blank

Write records to the Time Entry table (F1760) in S/WM.

1

Write records to the Journal Entry Transactions-Batch File table (F0911Z1) and to the F1760 table.

2

Write records to the Employee Transactions-Batch File table (F06116Z1) and to the F1760 table.

2. Protect time entry line

Blank = Do not protect

1 = Protect

Use this processing option to determine whether you can change the time entry line when you inquire on time entry information.

Valid values are:

Blank Allow changes to time entry.

1 Do not allow changes to time entry.

3. Round Actual Hours

Blank = Do not round

1 = Quarter Hour

2 = 10th Hour

3 = Half Hour

Use this processing option to specify how to display the actual hours worked. You can display either the actual or the rounded hours worked. Valid values are:

Blank

Display the actual hours.

1

Round the actual hours to the quarter hour.

2

Round the actual hours to the 1/10 hour.

3

Round the actual hours to the half hour.

4. Round Billable Hours

Blank = Do not round

1 = Quarter Hour

2 = 10th Hour

3 = Half Hour

Use this processing option to specify whether to round the billable hours.

Valid values are:

Blank Do not round the billable hours.

1 Round the billable hours to the quarter hour.

2 Round the billable hours to the 1/10 hour.

3 Round the billable hours to the half hour.

5. Protect Minimum Hours and Amount

Blank = Do not protect

1 = Protect

Use this processing option to protect the information in the Minimum Hours field and the Minimum Amount field. If you leave this option blank, you can make changes to the information in these fields.

Valid values are:

Blank Do not protect the minimum hours and amount.

1 Protect the minimum hours and amount.

Defaults Tab

The processing options on this tab define the defaults that the system uses during time entry.

1. Hour Type

Blank = Description is not loaded

Use this processing option to define the default hour type description. If you leave this option blank, the system does not retrieve the description.

2. Cost Type

Blank = B1

If you are billing for calls and the pricing method is time and materials, use this processing option to specify the default cost type. Typically, enter B1 (Direct Labor) as the default, or you can enter another valid value from UDC 30/CA (Cost Component Add-Ons).

3. Labor Unit of Measure

Blank = HR (Hours)

Use this processing option to specify the labor unit of measure for the Time Entry program (P17505). Enter a valid value from UDC 00/UM (Unit of Measure). If you leave this processing option blank, the system uses HR (hours).

4. Mimimum Hours

Blank = 0

Use this processing option to specify the minimum hours on each time entry record. If you leave this option blank, the default for the Minimum Hours field is 0.

5. Subledger

Blank = Subledger will be left blank
1 = Call Number
2 = Customer Number
3 = Site Number
4 = Short Item Number
5 = Contract Number
6 = Equipment Number

Use this processing option to specify the type of information that the system records in the Subledger field, when you create time entry records for the Employee Transactions - Batch File (F06116Z1) or the Journal Entry Transactions - Batch File (F0911Z1). Valid values are:

Blank

The system leaves the Subledger field blank

1

Maintenance request number

2

Customer number

3

Site number

4

Short item number

5

Contract number

6

Equipment number

6. Labor Unit of Measure for Hour

Use this processing option to specify the unit of time the system uses for Hour, such as HR. The system uses this option for Labor Unit of Measure conversion. You must specify a value for this processing option if you want the system to upload the time entry record to the Employee Transaction Batch File (F06116Z1). Enter a valid value from UDC 00/UM (Unit of Measure).

7. PDBA Code

Use this processing option to specify the default value for the PDBA code. The PDBA code defines the type of pay, deduction, benefit, or accrual. If you leave this option blank, the system leaves the PDBA code blank. Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

Versions Tab

The processing options on this tab define the versions that the system uses for inquiry and upload programs.

---

1. Service Billing Inquiry (P4812)

Blank = ZJDE0001

Use this processing option to specify the version to use for the Service Billing Inquiry program (P4812). If you leave this option blank, the system uses the ZJDE0001 version.

2. Customer Ledger Inquiry (P03B2002)

Blank = ZJDE0001

Use this processing option to specify the version to use for the Customer Ledger Inquiry program (P03B2002). If you leave this option blank, the system uses the ZJDE0001 version.

3. Time Entry MBF (P050002A)

Blank = ZJDE0001

Use this processing option to specify the version of the Time Entry program (P050002A) that the system uses to process and upload the data to the Payroll Batch table for processing. If you leave this option blank, the system uses the ZJDE0001 version.

Vertex Tab

The processing option on this tab defines the Vertex transaction type for labor billing.

---

1. Transaction Type for Labor Billings

Blank = SERVIC

Use this processing option to specify the Vertex transaction type that the system uses when calculating taxes for time entry billing. Only use this transaction type if you are billing for calls and the pricing method is Time and Materials. Enter a valid value from UDC 73/TY (Vertex Transaction Type). If you leave this processing option blank, the system uses transaction type SERVIC.

What You Should Know About Processing Options for Time Entry (P17505)

Accessing processing options for P17505 To access these processing options, type IV (Interactive Versions) in the Fast Path. On Work With Interactive Versions, enter the program number and click Find. Locate the version and choose Processing Options from the Row menu.

Billing for Maintenance Requests

The typical billing process includes accumulating maintenance requests to bill, creating and printing invoices, and recording journal entries for income and receivables.

Service Management is integrated with the Accounts Receivable and General Accounting systems. The billing process in Service Management is the same whether you are billing for contracts, work orders, or maintenance requests. After you set up the billing details in Service Management, the system runs the billing process, updates Accounts Receivable tables with invoice information, and updates General Accounting tables with revenue information.

Invoices are based on billable maintenance requests. The first step in the billing process is to accumulate billable requests. When you run Maintenance Request Workfile Generation (R17675), the system finds the requests that are eligible for billing from the Maintenance Request Master table (F1755) and the Time Entry table (F1760), and creates Billing Detail Workfile records (F4812).

See Also

- *Billing for Service Management* in the *Service Management Guide* for related billing information
- *Vertex Sales Tax Q Series* in the *Service Management Guide* if you are using Vertex

Prerequisite

- Set up the distribution AAIs.

Setting Up AAIs for Maintenance Requests

To bill maintenance requests and process business transactions properly, you must identify information about your account structure and specific account values. You define your account structure and specific account values by using automatic accounting instructions (AAIs). The system stores the AAI values in the Distribution/Manufacturing – AAI Values table (F4095). Whenever a program performs an accounting function, it accesses table F4095.

Distribution AAIs define the rules by which Service Management interacts with the general ledger. Accounting AAIs define the rules by which Service Management and the Accounts Receivable systems interact. When you define AAIs, you establish how the system processes transactions for various programs.

Maintenance request-related distribution AAIs consist of the following:

- 1747, Maintenance Request Revenue

  Determines the credit account for billable maintenance requests. Accounting AAIs determine the debit side of revenue, also known as the trade accounts receivable account.

- 1792, Maintenance Request Center Expense

  Determines the debit account for maintenance request time entry records that the system uploads to the Journal Entry Transactions - Batch File table (F0911Z1) or the Employee Transactions - Batch File table (F06116Z1).

- 1793, Accrued Maintenance Request Center Cost

  Determines the credit account of costs for maintenance request time entry records that the system uploads to able F0911Z1.

Based on key fields, the system retrieves the G/L account to use when creating an entry in the Billing Detail Workfile table (F4812). The key fields are:

- Company
- Doc Type
- G/L Category Code
- Cost Type

Based on these key fields, the system creates journal entries by using:

- Branch/Plant
- Object Account
- Subsidiary

Hierarchy for G/L Class Codes for Maintenance Requests

Based on the service type of the maintenance request, the system finds the Covered G/L Code or the Non-Covered G/L Code in the Service Contract Services table (F1725). The system uses these G/L codes to locate the appropriate distribution AAIs for amounts that are either covered or not covered by service contracts.

Based on the G/L class code, company, and document type, the system creates an entry using the distribution AAIs. The entry consists of a business unit; an object; and optionally, a subsidiary. You can override the G/L class codes.

Hierarchy for Responsible Business Unit for Maintenance Requests

If the business unit of an AAI is blank, the system locates the responsible business unit, based on the value specified in the Responsible Business Unit field, which is located on the Maintenance Requests tab of the SWM Constants form.

On SWM Constants, you can choose one of the following tables for the system to use to locate the responsible business unit:

Item Branch Master – Service/Warranty Extension (F41171) or Item Master – Service/Warranty Extension (F4117) tables

The system uses the branch/plant and item number on the maintenance request to find the responsible business unit in table F41171.

If the branch/plant is blank, the system uses the item number on the maintenance request to find the responsible business unit in table F4117.

If the business unit exists in table F41171 or F4117, the system uses the same business unit in the resulting accounting journal entry.

Product Family/Model Master table (F1790)

The system uses the product model on the maintenance request detail line to find the responsible business unit in table F1790.

If the business unit exists in table F1790, the system uses the same business unit in the resulting accounting journal entry.

Asset Master File table (F1201)

The system uses the equipment number on the maintenance request detail line to find the responsible business unit in table F1201.

If the business unit exists in table F1201, the system uses the same business unit in the resulting accounting journal entry.

Address Book Master table (F0101)

The system uses the customer number on the maintenance request detail line to find the responsible business unit in table F0101.

If the business unit for the customer exists in table F0101, the system uses the same business unit in the resulting accounting journal entry.

SWM Address Book Information table (F1797)

The system uses the customer number on the maintenance request detail line to find the responsible business unit in table F1797.

If the business unit for the customer exists in table F1797, the system uses the same business unit in the resulting accounting journal entry.

Note

If you assign a project business unit to the responsible business unit in the Business Unit Master table (F0006), the system uses the project business unit as the business unit for the account.

Generating the Maintenance Request Workfile

From the Maintenance Request menu (G1723), choose Maintenance Request Workfile Generation.

When you run the Maintenance Request Workfile Generation program (R17675), the system processes records in the Maintenance Request Master table (F1755) and the Time Entry table (F1760).

When you run the generation program in final mode, the system creates billing records in the Billing Detail Workfile (F4812) and updates the maintenance request record with the date billed. The Service Billing system then creates workfile transactions that are used by the Accounts Receivable and General Accounting systems.

Caution

When you have billed a maintenance request in final mode, you cannot change it.

Processing Options for Maintenance Request Workfile Generation (R17675)

Process Tab

These processing options specify whether to run the report in proof or final mode, and whether the system writes errors to the report or to the Work Center.

1. Proof or Final Mode

Blank = Proof Mode
1 = Final Mode

Use this processing option to specify whether to run the report in proof or final mode. Final mode updates all records. If you leave this processing option blank, the system generates the report in proof mode and does not update records.

Valid values are:

Blank Run the report in proof mode

1 Run the report in final mode

2. Work Center Or Report

Blank = Write errors to work center
1 = Write errors to report

Use this processing option to specify whether the system writes errors to the Work Center or to the report.

Valid values are:

Blank Write errors to the Work Center

1 Write errors to the report

Display Tab

This processing option specifies whether to print domestic or foreign currency amounts on the report.

1. Print Domestic or Foreign

D = Domestic
F = Foreign (Default)

Use this processing option to specify whether to print domestic or foreign currency amounts on the report. If you leave this processing option blank, the system prints foreign currency amounts. If foreign currency amounts do not exist, the system prints domestic currency amounts.

Valid values are:

D Print domestic currency amounts

F Print foreign currency amounts

Defaults Tab

These processing options specify the value to use in the Subledger field when you create billing transactions, and the billing date to use.

1. Subledger

Blank = Subledger will be left blank
1 = Maintenance Request Number
2 = Customer Number
3 = Site Number
4 = Short Item Number
5 = Contract Number
6 = Equipment Number

Use this processing option to specify the subledger value that the system uses when you create billing transactions. Valid values are:

Blank
No subledger value

1
Maintenance request number

2
Customer number

3
Site number

4
Item number

5
Contract number

6
Equipment number

2. Date Billed

Blank = Use System Date
1 = Use Maintenance Request Beginning Date

Use this processing option to specify the date, in the Date Billed field, that the system uses when you create billing transactions. The system updates this field only when you run the report in final mode. Valid values are:

Blank
System date

1
Maintenance request beginning date

Vertex Tab

These processing options specify the Vertex transaction type to use when calculating taxes for billings.

---

1. Vertex Transaction Type for Labor Billings

   Blank = SERVIC

Use this processing option to specify the Vertex transaction type that the system uses when calculating taxes for time entry billing. Only use this transaction type if you are billing for calls and the pricing method is Time and Materials. Enter a valid value from UDC 73/TY (Vertex Transaction Type). If you leave this processing option blank, the system uses transaction type SERVIC.

2. Vertex Transaction Type for Flat Rate Billings

   Blank = SERVIC

Use this processing option to specify the Vertex transaction type that the system uses when calculating taxes for flat rate billing. Use this transaction type only if you are billing for maintenance requests and the pricing method is flat rate.

Enter a valid value from UDC 73/TY (Vertex Transaction Type). If you leave this processing option blank, the system uses transaction type SERVIC.

Reviewing Maintenance Request Reports

When you want to review maintenance request statistics for your company, you can print reports to verify the duration of requests, review the product models that are causing the most requests, and so on.

Note

All reports are based on closed maintenance requests. When you verify the duration of requests, the beginning and ending date of the request must be within the date range set in the processing options.

Reviewing the Maintenance Request Detail/Summary Report

From the Maintenance Request menu (G1723), choose Maintenance Request Detail/Summary Report.

The Maintenance Request Detail/Summary report provides the ability to create reports that display detail or summary information for the following types of closed maintenance requests:

- Maintenance requests by queue
- Maintenance requests by product model
- Maintenance requests by environment
- Maintenance requests by equipment number
- Maintenance requests by item number

This report is based on closed maintenance requests. You can review detail or summary information for these requests, based on processing options for the version. When you run the detail report, the system lists all requests, as well as the total number of closed requests. When you run the summary report, the system only list the total number of closed requests.

When you set the processing options for this report, you specify a date range. For example, if you set up the date range to retrieve maintenance requests from 6/1/05 through 6/30/05, the system selects only those requests that have a beginning date on or after 6/01/05, but that are closed on or before 6/30/05.

When you generate the report, you can select one of the following versions, according to your organization requirements:

Closed Maintenance Requests by Request Queue
When you run version XJDE0001, the system lists the total number of closed maintenance requests by the queue number. You can define the queues in the data selection.

Closed Maintenance Requests by Product Model
When you run version XJDE0002, the system lists the total number of closed maintenance requests by the product model.

Closed Maintenance Requests by Environment
When you run version XJDE0003, the system lists the total number of closed maintenance requests by the environment.

Closed Maintenance Requests by Equipment Number
When you run version XJDE0004, the system lists the total number of closed maintenance requests by the equipment number.

Processing Options for Maintenance Request Detail/Summary Report (R17670)

Defaults Tab

1. Print Product Model or Item Number

Blank = Product Model
1 = Item Number

Use this processing option to specify whether the system includes the product model or the item number on the Maintenance Request Detail report or the Maintenance Request Summary report. Valid values are:

Blank
Product model

1
Item number

2. From Date

Use this processing option to define the From Date for the data selection.
3. Thru Date

Blank = Today's date

Use the processing option to define the Thru Date for the data selection. If you leave this option blank, the system uses today's date as the default.

Print Tab

1. Print Report

Blank = Print Maintenance Request Summary Report
1 = Print Maintenance Request Detail Report

Use this processing option to specify whether the system generates the Maintenance Request Summary report or the Maintenance Request Detail report. Valid values are:

Blank
Maintenance Request Summary report

1
Maintenance Request Detail report

Reviewing the Maintenance Request Statistics by Assignee Report

From the Maintenance Request menu (G1723), choose Maintenance Request Statistics by Assignee.

The Maintenance Request Statistics by Assignee report (R17671) provides you with the ability to create reports that display information for the following types of closed maintenance requests:

- Maintenance requests by assignee
- Maintenance requests by queue

This report is based on closed maintenance requests. When you set the processing options for the report, you can specify the closed request status in the processing options as well as the Handled Live request type, which identifies the requests that an assignee answered without having to call the customer back.

When you set the processing options for the report, you specify a date range. For example, if you set up the date range to retrieve maintenance requests from 6/1/05 through 6/30/05, the system selects only those requests that have a beginning date on or after 6/01/05, but that are closed on or before 6/30/05.

When you generate the report, you can select one of the following versions, according to your organization requirements:

Closed Maintenance Requests by Assignee
Use version XJDE0001 to list statistics for each request type by Assignee.

Closed Maintenance Requests by Queue
Use version XJDE0002 to list statistics for each request type for a queue number.

When you review the report, the total is based on the assignee. The Grand Total is based on the queue number.

Rows in Maintenance Request Statistics by Assignee Report

In the Maintenance Request Statistics by Assignee report, the system displays the following calculations in each row:

Days on Line
Ending Date - Beginning Date

This calculation is based on the workday calendar and is listed by total maintenance requests for each request type.

Total Time
Ending Date/Time - Beginning Date/Time

This calculation is based on the workday calendar and is listed by total maintenance requests for each request type.

Average Maintenance Requests per Day
Total Number / Days on Line

Average Time per Day
Total Time / Days on Line

Average Time per Maintenance Request
Total Time / Total Number of Maintenance Requests

This calculation includes all of the request types for each assignee.

Handled Live Number
Total number of closed maintenance requests that were handled live.

Live is a request type defined by a processing option.

Handled Live Percentage of Total
Total number of closed maintenance requests that were handled live / Total number of closed maintenance requests

Handled Normal Number
The total number of closed maintenance requests that do not have the request type of live.

Handled Normal Percentage of Total
The total number of normal maintenance requests / Total Number of closed maintenance requests

Totals in the Maintenance Request Statistics by Assignee Report

In the Maintenance Request Statistics by Assignee report, the system displays the total results based on the following calculations:

Days on Line	The sum of days on line.
Total Time	The sum of total time from each row.
Average Maintenance Requests per Day	Sum of Total Numbers (including handled live and normal) / Sum Days on Line
Average Time per Day	Sum of Total Time / Sum Days on Line
Average Time per Maintenance Request	Sum of Total Time / Sum of Total Numbers (including handled live and normal)
Handled Live Number	Sum of the row amounts
Handled Live Percentage of Total	Handled Live Number / Total Number (including handled live and normal) *100
Handled Normal Number	Sum of the row amounts
Handled Normal Number Percentage of Total	The sum of the handled normal number / Total Numbers (including handled live and normal) *100

The grand total row is the same as the total row.

Processing Options for Maintenance Request Statistics by Assignee (R17671)

Defaults Tab

1. From Date

Use this processing option to define the From Date for the data selection.

2. Thru Date

Blank = Today's date

Use the processing option to define the Thru Date for the data selection. If you leave this option blank, the system uses today's date as the default.

3. Call Type for Handled Live

Use this processing option to specify the maintenance request type for live requests. Live requests are from customers who speak to a representative on the first call. The request types appear in the request statistics on the report. Enter a value from UDC 17/CT.

4. Closed Call Status

Use this processing option to specify the status for closed maintenance requests. Maintenance requests with this status appear in the statistics on the report. Enter a value from UDC 17/ST.

Reviewing the Maintenance Request Statistics by Product Report

From the Maintenance Request menu (G1723), choose Maintenance Request Statistics by Product.

The Maintenance Request Statistics by Product report provides you with the ability to create reports that display information for the following types of closed maintenance requests:

- Maintenance requests by product model
- Maintenance requests by environment
- Maintenance requests by equipment number
- Maintenance requests by item number
- Maintenance requests by queue

This report is based on closed maintenance requests. When you set the processing options for the report, you can specify the closed request status in the processing options, as well as the Handled Live request type, which identifies the requests that an assignee answered without having to call the customer back.

In the processing options, you must specify a date range that the system uses to retrieve closed maintenance requests. In the report, the system selects closed requests if the beginning and ending dates of the requests fall within the date range that you specify in the processing options From Date and Thru Date.

When you generate the report, you can select one of the following versions, according to your organization requirements:

Closed Maintenance Requests by Product Model

Use version XJDE0001 to list maintenance request statistics that are based on each request type for the product model. The total is based on the product model.

Closed Maintenance Requests by Environment

Use version XJDE0002 to list maintenance request statistics that are based on each request type for the product model, based on the environment.

The total is based on the product model. The grand total is based on the environment.

Closed Maintenance Requests by Equipment Number

Use version XJDE0003 to list maintenance request statistics that are based on each request type for the equipment number.

The total is based on the item number.

Closed Maintenance Requests by Item Number

Use version XJDE0004 to list maintenance request statistics that are based on each request type for item number.

The total is based on item number.

Closed Maintenance Requests by Queue

Use version XJDE0005 to list maintenance requests statistics that are based on each request type for product model for the queue number.

The total is based on the product model. The grand total is based on the queue number.

Rows in Maintenance Request Statistics by Product Report

In the Maintenance Request Statistics by Product report, the system displays the following calculations in each row:

Handled Live Number

Total number of handled live maintenance requests.

This sum is based on the processing option that indicates the request type for requests that are handled live.

Number of Handled Live Maintenance Requests within the Commitment

Total number of handled live maintenance requests when the execution date is before the commitment date.

Percentage of Maintenance Requests within the Commitment

Number within commitment / Total number of maintenance requests (including handled live and normal for each level break) *100.

Handled Normal Number

Total number of handled normal maintenance requests.

The sum is based on the request type for requests that are handled normally.

Number of Handled Normal Maintenance Requests within Commitment

Total number of handled normal maintenance requests when the execution date is before the commitment date.

Percentage within Commitment

Number within commitment / Total number of maintenance requests (including handled live and normal for each level break) *100.

Totals in Maintenance Request Statistics by Product Report

In the Maintenance Request Statistics by Product report, the system displays the total results, based on the following calculations:

Handled Live Number	The sum of the total number of handled live maintenance requests from each row.
Number within the Commitment	The sum of the total number within the commitment.
Percentage of Maintenance Requests within the Commitment	The sum of the number within commitment / Total number of maintenance requests (including handled live and normal for each level break) *100.
Percentage within Commitment	The sum of the number within commitment / Total number of maintenance requests (including handled live and normal for each level break) *100.
Handled Normal Number	Total number of handled normal maintenance requests. The sum is based on the request type for requests that are handled normally.
Total Percentage within Commitment	(Number within commitment for handled live + Total number with commitment for handled normal) / Total number of maintenance requests (including handled live and normal for each level break) *100.

The grand total row is the same as the total row.

Processing Options for Maintenance Request Statistics by Product (R17672)

Defaults Tab

1. From Date

Use this processing option to define the From Date for the data selection.
2. Thru Date
Blank = Today's date

Use the processing option to define the Thru Date for the data selection. If you leave this option blank, the system uses today's date as the default.
3. Call Type for Handled Live

Use this processing option to specify the maintenance request type for live requests. Live requests are from customers who speak to a representative on the first call. The request types appear in the request statistics on the report. Enter a value from UDC 17/CT.

4. Closed Call Status

Use this processing option to specify the status for closed maintenance requests. Maintenance requests with this status appear in the statistics on the report. Enter a value from UDC 17/ST.

Reviewing the Maintenance Request Duration Statistics by Products Report

From the Maintenance Request menu (G1723), choose Maintenance Request Duration Statistics by Product.

The Maintenance Request Duration Statistics by Product report provides you with the ability to create reports that display information for the following types of closed maintenance requests:

- Maintenance requests by product model
- Maintenance requests by environment
- Maintenance requests by equipment number
- Maintenance requests by item number
- Maintenance requests by queue

This report is based on closed maintenance requests. When you set the processing options for the report, you can specify the closed request status in the processing options, as well as the Handled Live request type, which identifies the requests that an assignee answered without having to call the customer back.

In the processing options, you must specify a date range that the system uses to retrieve closed maintenance requests. In the report, the system selects closed requests if the beginning and ending dates of the requests fall within the date range that you specify in the processing options From Date and Thru Date.

When you generate the report, you can select one of the following versions, according to your organization requirements:

Closed Maintenance Requests by Product Model

Use version XJDE0001 to list maintenance request statistics that are based on each request type for the product model. The total is based on the product model.

Closed Maintenance Requests by Environment

Use version XJDE0002 to list maintenance request statistics that are based on each request type for the product model, based on the environment.

The total is based on the product model. The grand total is based on the environment.

Closed Maintenance Requests by Equipment Number

Use version XJDE0003 to list maintenance request statistics that are based on each request type for the equipment number.

The total is based on the item number.

Closed Maintenance Requests by Item Number

Use version XJDE0004 to list maintenance request statistics that are based on each request type for the item number.

The total is based on item number.

Closed Maintenance Requests by Queue

Use version XJDE0005 to list maintenance requests statistics that are based on each request type for the product model for the queue number.

The total is based on the product model. The grand total is based on the queue number.

Rows in the Maintenance Request Duration Statistics by Product Report

In the Maintenance Request Duration Statistics by Product report, you can review the results of the following calculations in each row, based on the level break:

Average Maintenance Request Duration	Total elapsed hours / Total number of maintenance requests for each row
Percentage of Maintenance Requests under 3 Hours	Total number of maintenance requests (total elapsed hours < 3) / Total number of maintenance requests for each row
Percentage of Maintenance Requests over 1 Day	Total number of maintenance requests (total elapsed hours > 24) / Total number of maintenance requests for each row
Percentage of Maintenance Requests within Commitment	Number within commitment (execution date < commitment date) / Total number of maintenance requests for each row
Percentage of Maintenance Requests under 3 Minutes	Total number of maintenance requests (total elapsed hours < 0.05) / Total number of maintenance requests for each row
Percentage of Maintenance Requests over 10 Minutes	Total number of maintenance requests (total elapsed hours > .17) / Total number of maintenance requests for each row

Totals in the Maintenance Request Duration Statistics by Product Report

In the Maintenance Request Duration Statistics by Product report, the system displays the totals, based on the following calculations. Each total includes all maintenance request types for each level break.

Average Maintenance Request Duration	Total elapsed hours / Total number of maintenance requests
Percentage of Maintenance Requests under 3 Hours	Total number of maintenance requests (total elapsed hours < 3) / Total number of maintenance requests
Percentage of Maintenance Requests over 1 Day	Total number of maintenance requests (total elapsed hours > 24) / Total number of maintenance requests This calculation includes all request types for the level break.
Percentage of Maintenance Requests within Commitment	Number within commitment (execution date < commitment date) / Total number of maintenance requests
Percentage of Maintenance Requests under 3 Minutes	Total number of maintenance requests (total elapsed hours < 0.05) / Total number of maintenance requests
Percentage of Maintenance Requests over 10 Minutes	Total number of maintenance requests (total elapsed hours > .17) / Total number of maintenance requests

The grand total row is the same as the total row.

Processing Options for Maintenance Request Duration Statistics by Products (R17673)

Defaults Tab

1. From Date

Use this processing option to define the From Date for the data selection.

2. Thru Date

Blank = Today's date

Use the processing option to define the Thru Date for the data selection. If you leave this option blank, the system uses today's date as the default.

3. Call Type for Handled Live

Use this processing option to specify the maintenance request type for live requests. Live requests are from customers who speak to a representative on the first call. The request types appear in the request statistics on the report. Enter a value from UDC 17/CT.

4. Closed Maintenance Request Status

Use this processing option to specify the status for closed maintenance requests. Maintenance requests with this status appear in the statistics on the report. Enter a value from UDC 17/ST.

Reviewing the Maintenance Request Print Report

From the Maintenance Request menu (G1723), choose Maintenance Request Print.

You can review specific information by printing maintenance requests. Based on your processing options, you can choose to print any associated media objects with the maintenance request. You can indicate specific maintenance requests in your data selection.

Processing Options for Print Maintenance Request (R17674)

Print Tab

1. Print Media Object

Blank = Do not Print Media Object on Report
1 = Print Media Object on Report

Use this processing option to specify whether to print media objects on the report. Valid values are:

Blank
Do not print media objects on the report.

1
Print media objects on the report.

Working with Maintenance Requests on the Web

As part of your company's maintenance service solution, you can enter maintenance requests on the Web for technical assistance or product information, or to report a problem. You can enter a maintenance request or review the status of a request at any time that is convenient.

Note

The following tasks are based on forms and data that are provided for self-service in a Web environment. The navigations, forms, steps, and data that are shown in these tasks might not correspond to your customized self-service Internet site.

Prerequisites

- ❑ Verify that you have set up address book records, complete with SWM extension records, as well as A/R information.
- ❑ For requesters (callers), verify that you have set up their user profiles to limit access in PeopleSoft software to only the Customer Self-Service menu (G42314), if necessary.
- ❑ Verify that you have set up maintenance request features for processing maintenance requests. For standard entry and Web-based entry of maintenance requests, you must set up SWM constants, queues, distribution lists, and routings before you can enter the request information.
- ❑ You must set the processing options for the following programs for self-service for your requesters to enter or review maintenance requests:
  - Maintenance Request Entry (P17501)
  - Work with Maintenance Requests (P17500)

Entering Maintenance Requests on the Web

During standard entry of maintenance requests, you can enter issues, edit the information, and access master tables by way of Form exits such as Address Book, Customer Master, and Equipment Master.

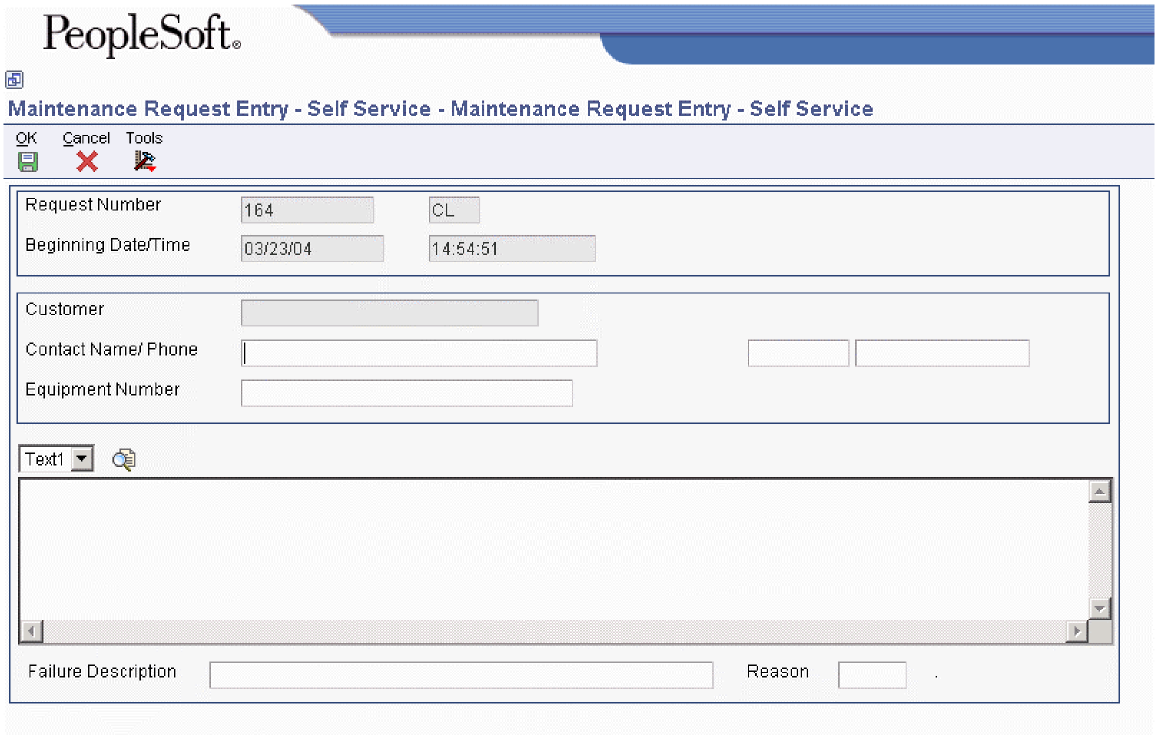
In Web-based entry of maintenance requests, you can add issues by entering minimum information about the request, such as the caller name, the item's serial number, and a brief description of the issue.

► To enter maintenance requests on the Web

From the Maintenance Request menu (G1713), choose Maintenance Request Entry – Self Service.

Note

Based on the sign-on, the system retrieves default information about the requester (caller), such as the telephone number.



1. On Maintenance Request Entry – Self Service, enter the following information:
   - Contact Name/ Phone
   - Equipment Number
   - Failure Description

     Depending on how you have set your processing options, the first 80 characters from the media object can be used as the default value for the Failure Description field.

   - Reason

     The caller can choose a request reason from the visual assist.

2. Click OK.

The system assigns a maintenance request number, based on Next Numbers. The item and caller information is based on the user signon and the SWM information that exists in the master tables.

Reviewing Maintenance Requests on the Web

In the Work with Maintenance Requests program (P17500), requesters can search for all of the maintenance requests that are associated with their address book numbers. When you activate self-service for Maintenance Request Entry (P17501), the system hides all of the Form exits and Row exits that exist in the maintenance requests forms.

► To review maintenance requests on the Web

From the Maintenance Request menu (G1713), choose View Maintenance Request – Self Service.

Note

Based on the signon, the system retrieves all of the maintenance requests that are associated with that address book number.

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1. On Work With Maintenance Requests, enter query information in the QBE fields, such as Request Number and Priority, and click Find.
2. Review the information.

Managing the Work Center for Maintenance Requests

The Work Center displays maintenance requests in a tree structure. You can view the queues and all of the maintenance requests within a queue. You can move a request from one queue or assignee to another queue or assignee, and you can review messages and data that are related to any request.

As an option, the Work Center displays maintenance requests in different colors to indicate priority. You define the colors when you set up user defined codes.

Reviewing Maintenance Requests

To review maintenance requests using the Work Center, you set the Service & Warranty Constants to write message records. Use the Work Center for maintenance requests to begin most of your daily procedures, and to access issues and tasks in open or personal queues. Each queue has an address book number assigned to it. Issues and tasks are represented by icons.

The Work Center form contains three panels:

- The left panel is called the tree panel because it contains the tree structure.
- The middle panel is called the icon panel.
- The right panel is called the viewer panel.

When you open a queue, important information about the first issue or task in the queue appears in a template in the viewer panel on the right. This information includes the name of the customer, and the severity and status of the issue. You can view information about any other issues or tasks in the queue by clicking them.

Queues are organized in a hierarchical format. The queue at the top of the tree panel is the highest in the hierarchy for the address number that you entered in the Address Number field. Queues of lower hierarchy appear indented beneath the queues of higher hierarchy.

► To review maintenance requests by consultant

From the Maintenance Request menu (G1713), choose Work Center.

1. On Work Center, enter the address book number of the consultant in the following field and click Find:
   - Address Number / User / Role
2. To narrow your search, complete the following field:
   - Tickler Date

   The system displays a tree structure that is arranged by queue and then by consultant. Expand each level of the tree until you can see the information that you need. You can view all maintenance requests that are assigned to a specific consultant.

3. To review all of the queues that are associated with a specific address book number, click the following option:
   - All Queues
4. To display all messages in a specific mailbox, click the following option:
   - Message Mode
5. Select a maintenance request from the tree to view specific information about that request in the right column.
6. To move a maintenance request between personal queues, select the request and drag it to the appropriate queue.

► To review maintenance requests by queue

From the Maintenance Request menu (G1713), choose Work Center.

1. On Work Center, enter the address book number of the queue in the following field and click Find:
   - Address Number / User / Role
2. To narrow your search, complete the following field:
   - Tickler Date
3. Select a maintenance request from the tree to view specific information about that request in the right column.
4. To move a maintenance request between group queues, select the request and drag it to the appropriate queue.

Working with Escalation Workflow for Maintenance Requests

You can use the PeopleSoft Workflow Tools to streamline the process of escalating a maintenance request and notify the necessary individuals that the request has been escalated. The system allows you to send email notifications to one or more individuals if a maintenance request is not closed within a specified amount of time, thereby automating paper-based tasks into an email-based process across a network.

You can define workflow structures for each queue, priority, and level of escalation. Workflow structure setup only allows a single address number at any escalation level. If you want to send the escalation message to multiple people, you must create another workflow structure that includes the list of people and specifies this workflow structure at the appropriate escalation level.

When you add a maintenance request to the database, the system creates a message within the Work Center (P012501). This message is placed in a mailbox at the queue level or at the assignee level. Based on the queue setup, the request type, and the priority information within queue revisions, the system updates the request record with the escalation date and time, and an escalation level 1. All escalation date and time calculations are based on the commitment date and time that the system calculates, based on queue or contract information.

The system updates the request record with the escalation date and time, and escalation level 1 based on the setup of the queue, request type, and priority information within queue revisions.

When the escalation time has passed, the system can increase the priority of the maintenance request and send notification messages to the appropriate contacts. The system updates the escalation level for the request and awaits a status change, the next level of escalation, or notification. When you close the request or reach the end of your escalation levels, the request is no longer eligible for escalation.

Note

Although you can use many methods to implement maintenance request escalation, the tasks that follow specify only one method for illustration purposes. These tasks enable you to understand the setup process. Use these tasks to set up the escalation workflow that meets the needs of your organization.

Prerequisite

- ❑ Ensure that you have installed PeopleSoft Workflow Modeler so that you can use escalation workflow.

Considerations

Note the following considerations when escalating maintenance requests:

- Escalation is based on the date and time when a maintenance request is first entered and each time that it is escalated again.
- Dates and times are based on specific escalation setup for each queue and priority, or they are based on the generic escalation setup for all queues and each priority.

- The workflow process controls who receives emails.
- The system checks for maintenance requests that need to be escalated when you run Escalated Maintenance Requests (R17680).

Setting Up the Escalation Distribution List

First, you need to set up an address book number for the escalation distribution list. Then you add members to the distribution list so that the system can send escalation messages to them.

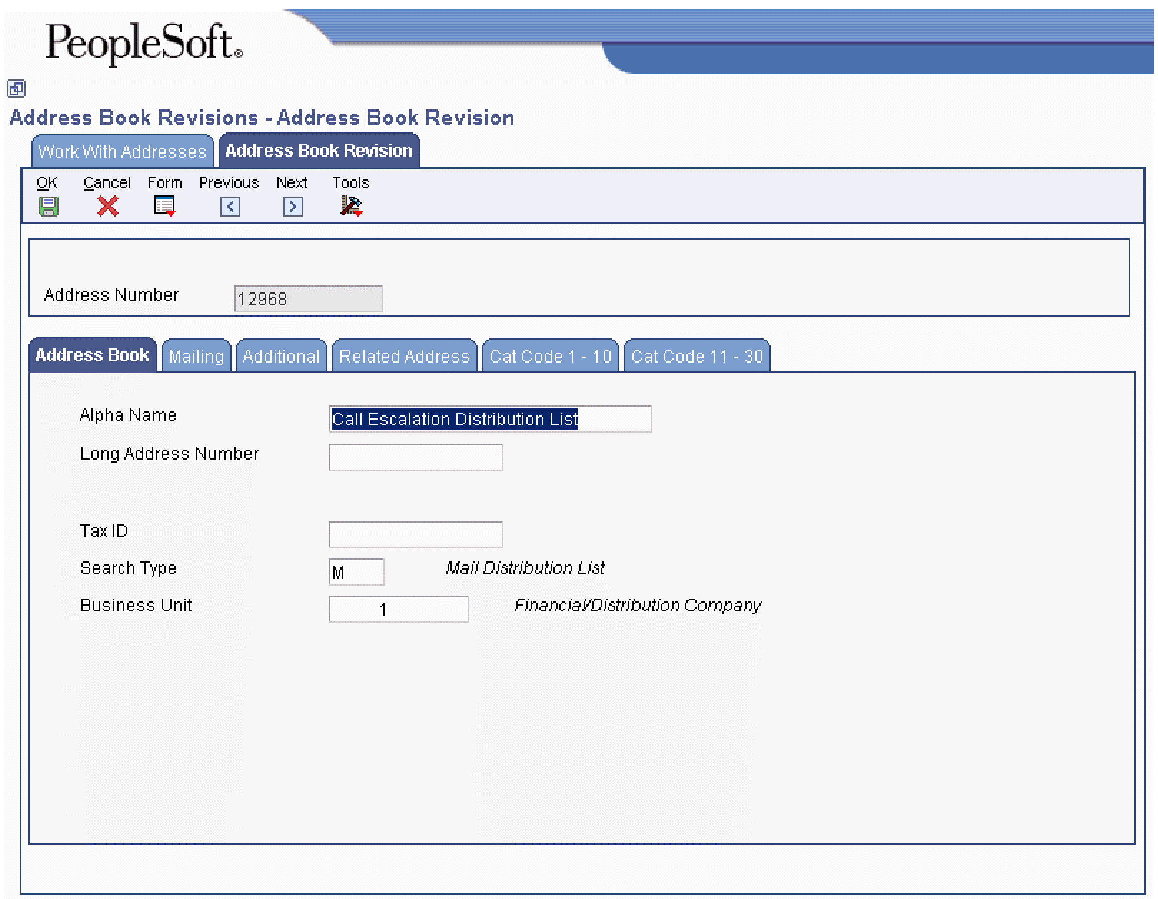
See Also

- *Setting Up Distribution Lists* in the *EnterpriseOne Workflow Tools Guide* for additional information about distribution lists

► To set up the address book number for the escalation distribution list

From the Service and Warranty Setup menu (G1740), choose Address Book Revisions.

1. On Work With Addresses, click Add.



2. On Address Book Revisions, complete the following fields:
   - Address Number
   - Alpha Name

Enter a name for the list, such as Escalation Distribution List.

- Search Type

3. Click OK.

▶ To add members to the escalation distribution list

From the Maintenance Request Setup menu (G1743), choose Group Revisions.

1. On Work With Distribution Lists, click Add.
2. On Address Parent/Child Revisions, complete the following fields:
   - Parent Number

     Enter the address book number of the escalation distribution list that you set up in the previous task.

   - Structure Type

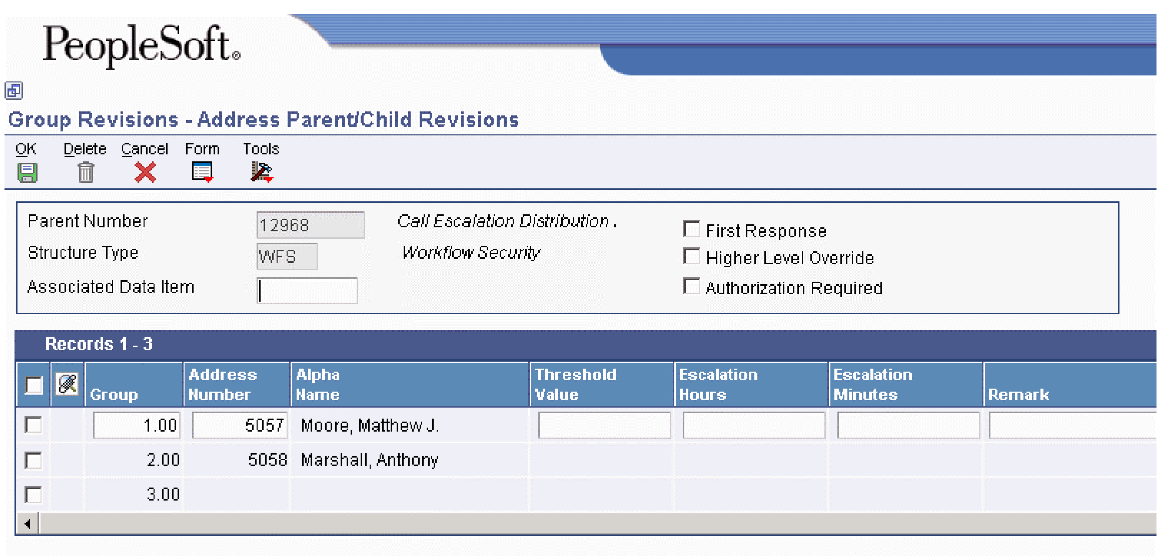
     Enter WFS (Workflow Security), or enter your own user defined code. You must use the same Structure Type consistently throughout the escalation setup process.

3. In the first row, complete the following field:
   - Address Number

     Enter the address number of an individual to include on the distribution list.

4. In the remaining rows, continue entering the Address Number values as many times as necessary to build the distribution list.

   All of the individuals on this list will receive escalation messages. Do not complete the other fields.



5. After you finish building the distribution list, click OK.

Setting Up the CALLESCAL Workflow Process

Note

In the steps that follow, for the Address Book Number and Queue fields, ensure that you use the data that is set up for your organization.

For illustration purposes, these tasks use Address Book Number 12968 and Queue 60000.

CALLESCAL is the name of the workflow process for escalating maintenance requests. Complete the tasks that follow to set up the workflow process.

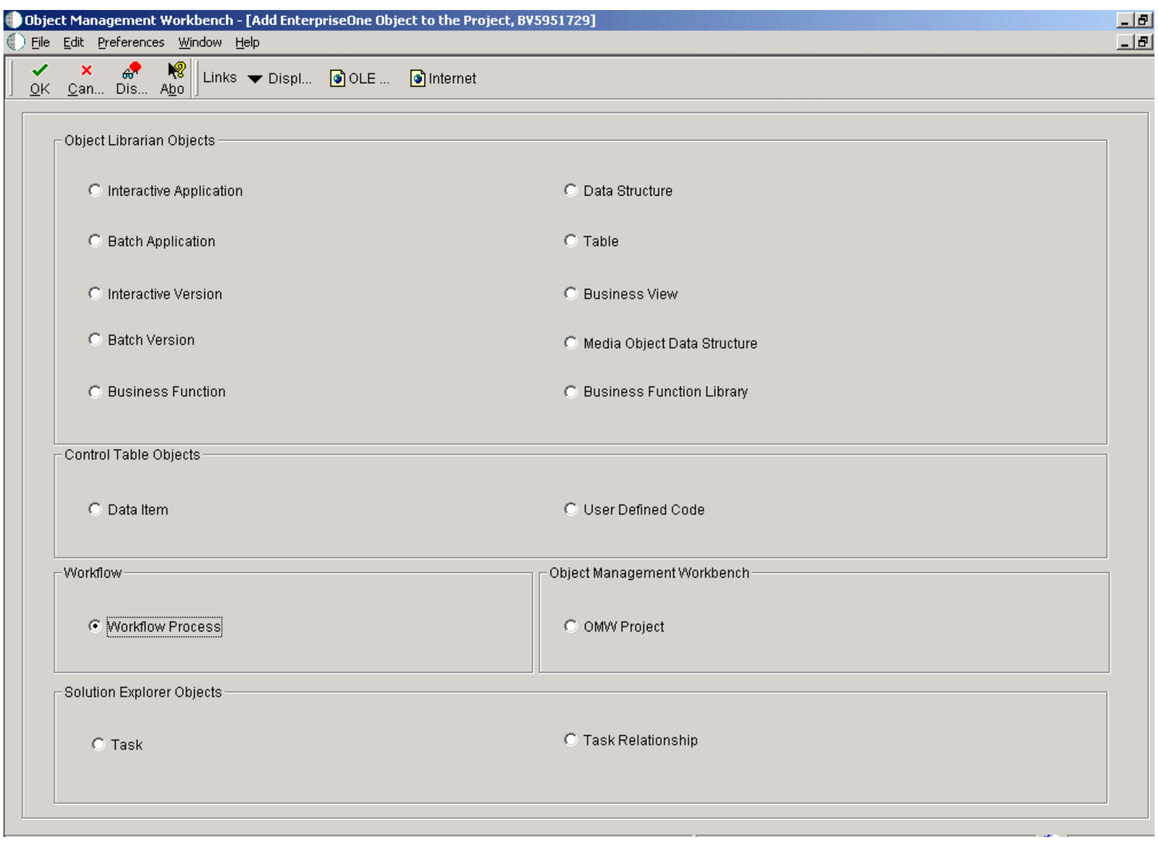
► To set up the CALLESCAL workflow process

Choose one of the following navigations:

In the Fast Path, type OMW and press Enter.

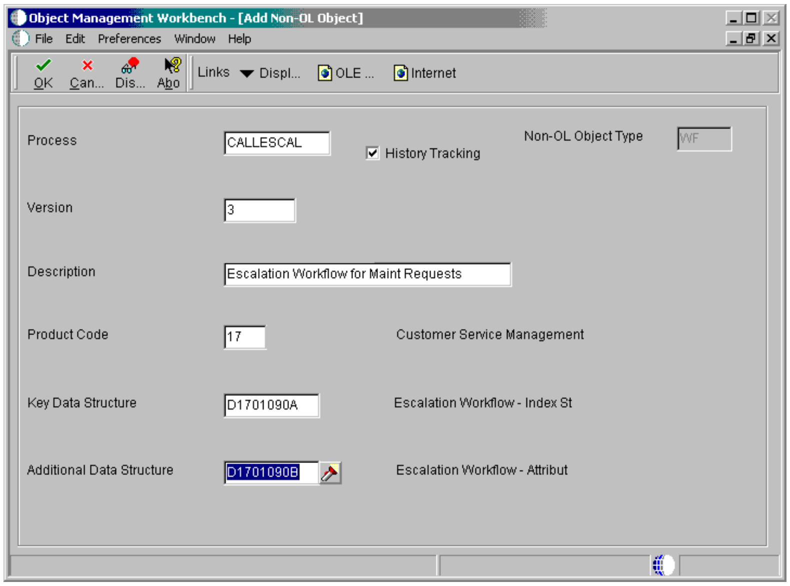
From the Cross Application Development Tools menu (GH902), choose Object Management Workbench.

1. On Object Management Workbench, click Add.



2. On Add EnterpriseOne Object to the Project, click the following option and click OK:

- Workflow Process



3. On Add Non-OL Object, complete the following fields and click OK:

- Process

  Type the following (exact spelling in capital letters):

  CALLESCAL

- History Tracking

  Ensure that this option contains a checkmark.

- Version

  Enter a version number, such as 2. (Version 1 is already reserved for the version that is sent with the pristine data that was delivered with your system.)

- Description

  Enter a description, such as Escalation Workflow for Maint Requests.

- Product Code

  Enter 17.

- Key Data Structure

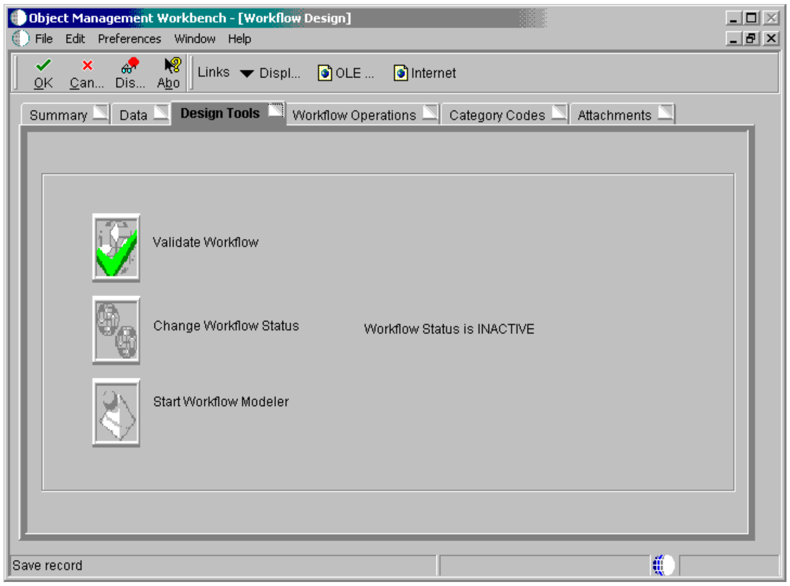
  Type the following:

  D1701090A

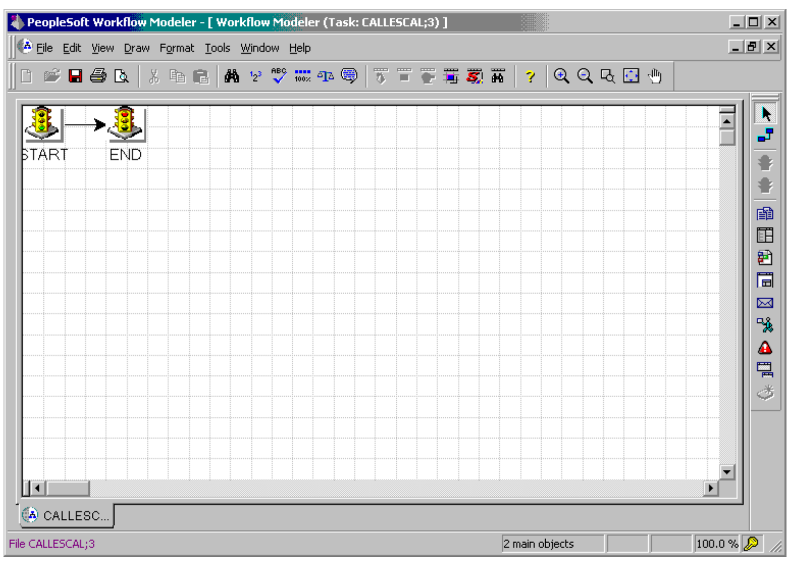
- Additional Data Structure

  Type the following:

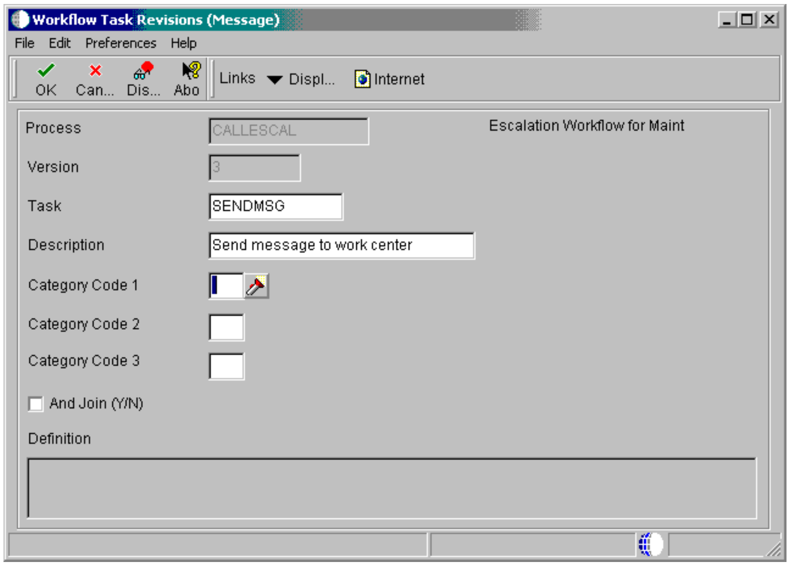
  D1701090B



4. On Workflow Design, click the Design Tools tab.
5. Click the Start Workflow Modeler button.



6. On Workflow Modeler (Task: CALLESCAL), click the Message button (envelope icon), drag it onto the design area, and click again.



7. On Workflow Task Revisions (Message), complete the following fields and click OK:

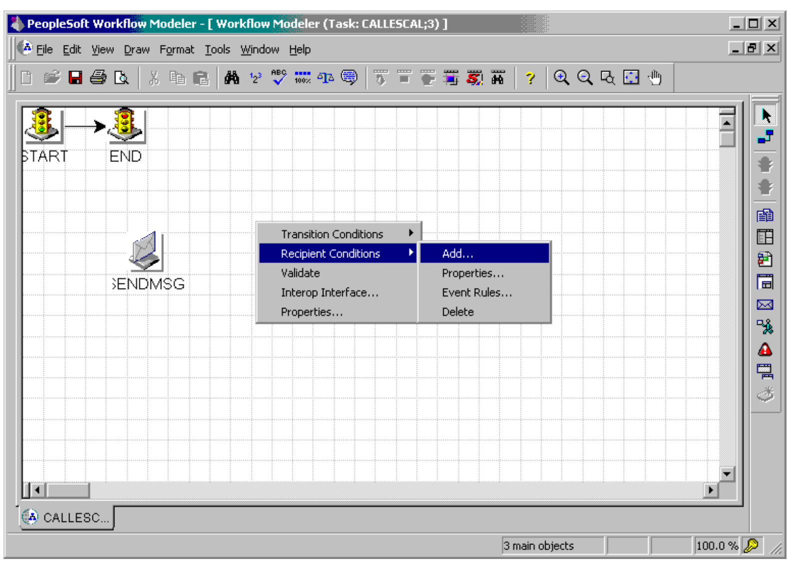
- Task

  Type the following:

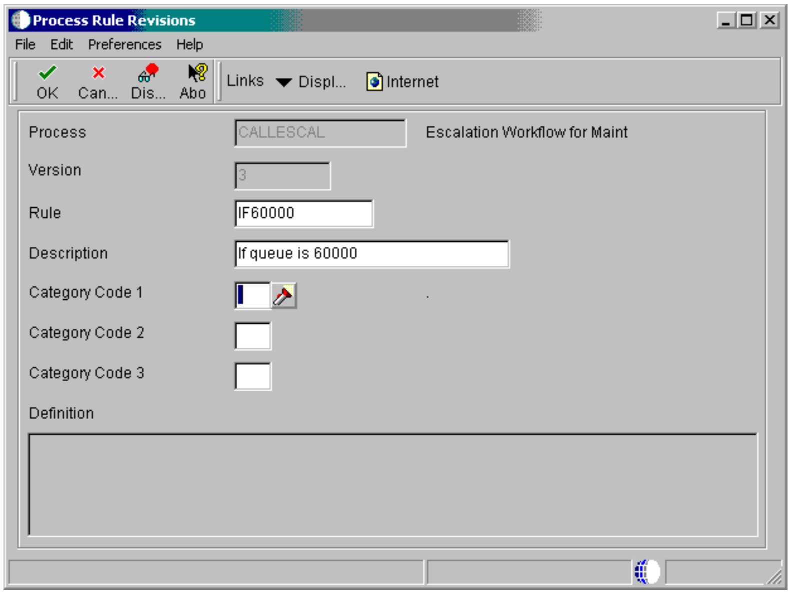
  SENDMSG

- Description

  Enter a description, such as Send Message to Work Center.



8. On Workflow Modeler (Task: CALLESCAL), right-click in the design area, choose Recipient Conditions, and then choose Add.



9. On Process Rule Revisions, complete the following fields and click OK:

   - Rule

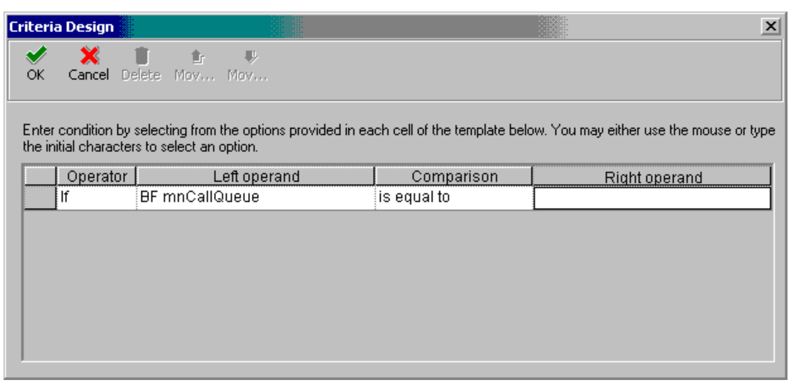
     Type the following:

     IF60000

   - Description

     Type the following:

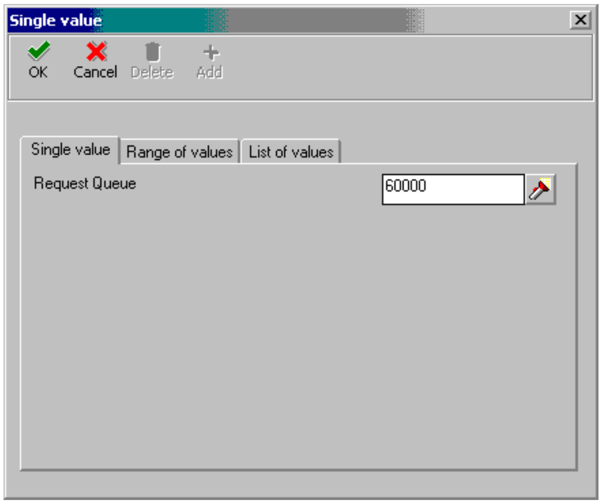
     If Queue is 60000



10. On Criteria Design, select the following values:

    - Left Operand = BF mnCallQueue
    - Comparison = is equal to
    - Right Operand = Literal

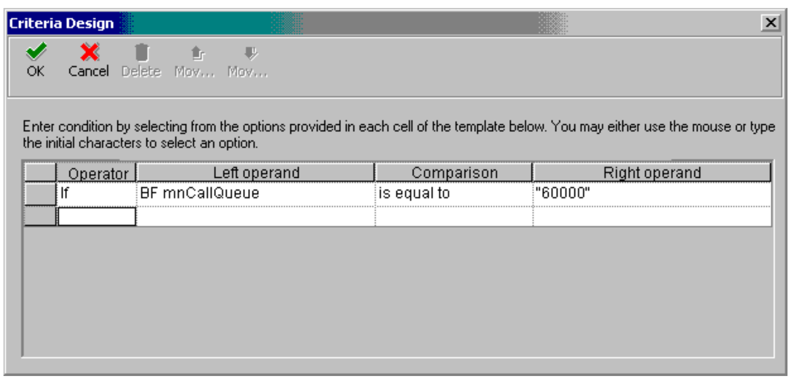
      The system displays the Single value window when you select Literal.



11. On Single value, complete the following field and click OK:
    - Request Queue

      Enter your queue number (in this example, 60000).

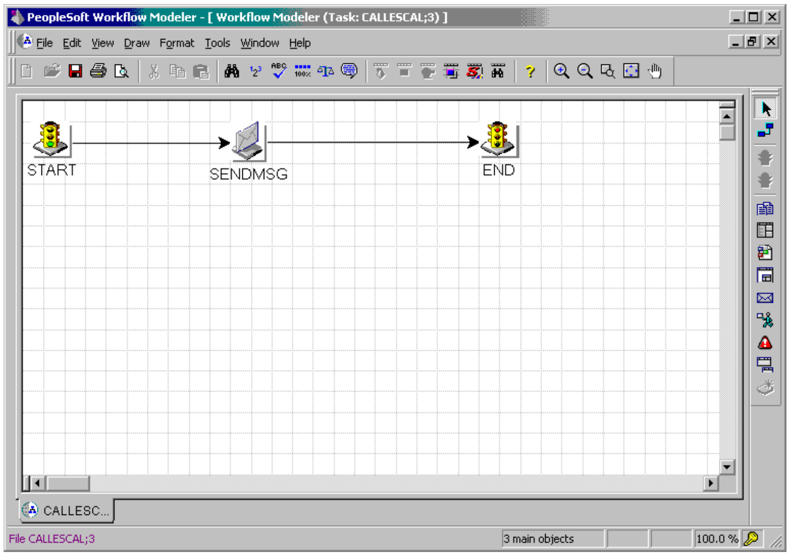
    The system displays the queue number in the Right Operand field of the Criteria Design form.



12. On Criteria Design, click OK.
13. On Workflow Modeler (Task: CALLESCAL), attach the SENDMSG.

Note

To make the task a component of the workflow process, you must connect (attach) the task to other tasks by adding transitions. See To add a transition in the EnterpriseOne Workflow Tools Guide.



14. On Workflow Modeler (Task: CALLESCAL), right-click SENDMSG and choose Event Rules.
15. On System Functions, click the Parameter Mapping tab, and use the right arrow to set the following parameters for data item values:
    - Address Number = BF mnMessageReceiver
    - Structure Type = <Single Recipient>
    - Mailbox = BF szMessageMailBox
    - Subject = BF szMsgDescription
    - Text = **************************
    - Active = None
    - Message = LM1749
16. On Text Substitution, select the following Available Object:
    - BF szSTATUS_CODE_REQUEST_2
17. Use the right arrow to set the following parameter for the text substitution message LM1749:
    - &1 = BF mnCallNumber
18. Click OK.
19. On the Parameter Mapping tab of System Functions, use the right arrow to set the following parameter:
    - MessageKey = BF mnMessageReceiver
20. Click OK.
21. On Workflow Modeler (Task: CALLESCAL), right-click SENDMSG, choose Recipient Rules.

22. In the first row of the detail area of Recipient Rules, complete the following fields and click OK:

    - Recipient Condition

      Type the following (where xxxxx is your queue number):

          IFxxxxx

      IF60000 is used in this example.

    - Address Book Number

      Enter the address book number that contains the distribution list. Address Book Number 12968 is used in this example.

    - Structure Type

      Enter WFS (Workflow Security), or enter your own user defined code. Ensure that you use the same Structure Type consistently throughout the escalation setup process.

23. On Workflow Modeler (Task: CALLESCAL), choose File and then choose Save to save the CALLESCAL workflow process.
24. Choose File, and then choose Exit.
25. On Workflow Design, click the following button:
    - Change Workflow Status

    The workflow status changes to ACTIVE.
26. Click OK.

Setting Up Escalation Detail for Queues and Priorities

Each time that the system escalates a maintenance request, the system uses the detail data from the Maintenance Request Priority Revisions form to calculate the following information:

- New escalation date and time
- Priority

When you enter a maintenance request, the system assigns a default escalation level of 1. The system locates the detail line containing an escalation level of 1. If the request is assigned, the system uses the Assigned Percentage value to calculate the escalation date and time. If the request is unassigned, the system uses the Unassigned Percentage field value to make the calculation. The system also uses the Commitment Date/Time value and the Response Time value in calculating the escalation time.

If you do not close the maintenance request by the escalation date and time, the system sends messages to the individuals on the distribution list, changes the escalation level, and calculates a new escalation date and time. The system continues to escalate the request and increment the escalation level until you close the request, or until the system does not find a detail line containing the next escalation level.

► To set up escalation detail for queues and priorities

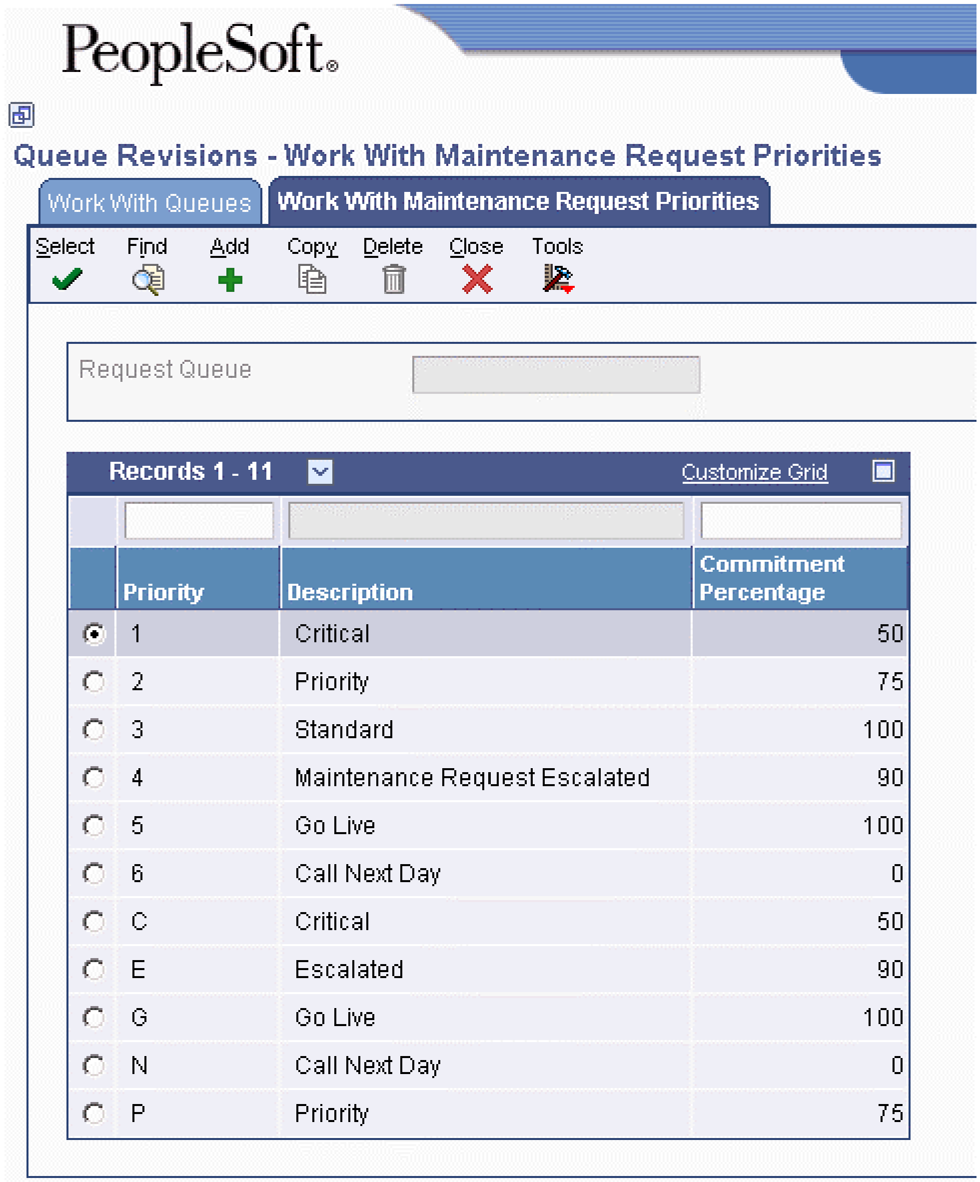
Note

This task describes how to set up maintenance request escalation data for all queues at one priority level. You must repeat these steps for each priority code and queue that you set up.

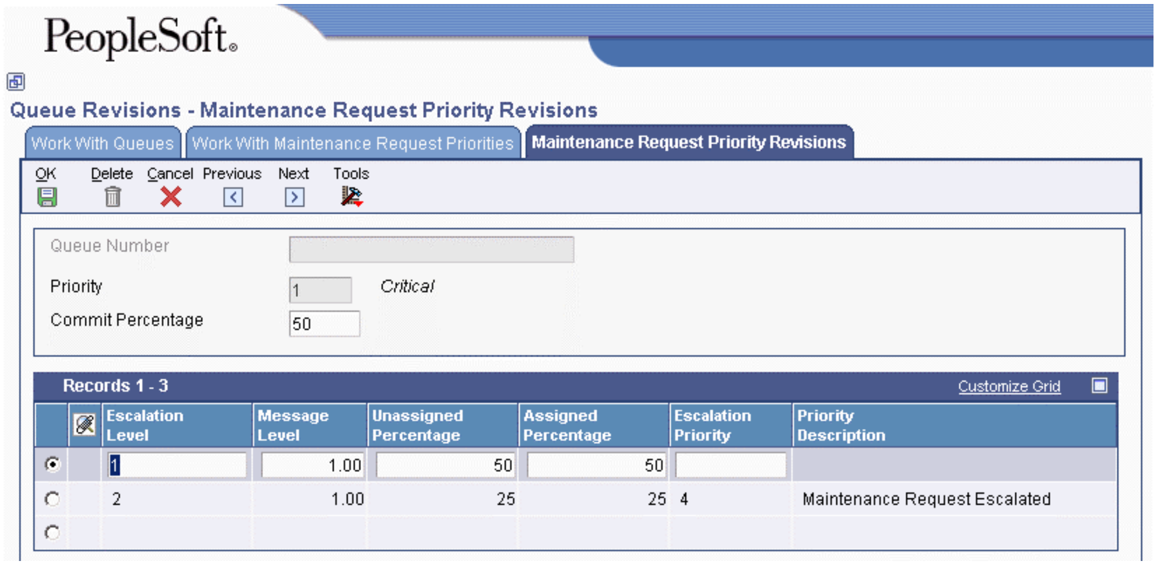
From the Maintenance Request Setup menu (G1743), choose Queue Revisions.

1. On Work With Queues, choose Queue Priorities from the Form menu.

   Alternatively, if you want to set up escalation data for a specific queue, you can locate the queue on Work With Queues and choose Queue Priorities from the Row menu.



2. On Work With Maintenance Request Priorities, choose the row for the priority that you want to set up and click Select.



3. In the first row of Maintenance Request Priority Revisions, complete the following fields:
    - Escalation Level

      Enter 1.
    - Message Level

      Enter 1.0.
    - Unassigned Percentage
    - Assigned Percentage
4. In the second row, complete the following fields:
    - Escalation Level

      Enter 2.
    - Message Level

      Enter 1.0.
    - Unassigned Percentage
    - Assigned Percentage
5. In the remaining rows, continue entering as many escalation levels as you want to set up.
6. Click OK.

Processing Options for Work with Queues (P17506)

Versions

1. Address Book MBF (P0100041) Version

Blank = ZJDE0001

Default

1. Document Type

Display

1. Display Maintenance Request Queues or Work Order Queues.

Blank = Work Order Queues.

1= Maintenance Request Queues.

Running the Escalation Program for Maintenance Requests

From the Maintenance Request menu (G1723), choose Escalation Processing.

After you enter new maintenance requests, you can run the Escalated Maintenance Requests program (R17680) to generate a report of those requests that need escalation and to send messages to the individuals on the escalation distribution list.

If you want to confirm the escalation workflow, choose Work Center from the Maintenance Request menu (G1713). Inquire on the address book number of the escalation distribution list or on the members in the escalation distribution list.

Prerequisite

- On the Maintenance Requests tab of Service & Warranty Constants (P17001), ensure that you have access authority to the mailbox which is listed in the Mail Box for Escalation constant. This mailbox will contain the escalation messages.

Processing Options for Escalated Maintenance Requests (R17680)

Print Tab

1. Display Requests Processed for Escalation

Blank = Print Both Escalated and Not Escalated Requests

1 = Print Only Escalated Requests

Use this processing option to specify whether the system prints all records selected to print on the report or only those records that have been escalated. Valid values are:

Blank

Print both escalated and not escalated requests that are included in the data selection.

1

Print only the escalated requests that are included within the data selection.

EnterpriseOne PeopleBooks Glossary

"as of" processing	A process that is run at a specific point in time to summarize item transactions.
52 period accounting	A method of accounting that uses each week as a separate accounting period.
account site	In the invoice process, the address to which invoices are mailed. Invoices can go to a different location or account site from the statement.
active window	The window that contains the document or display that will be affected by current cursor movements, commands, and data entry in environments that are capable of displaying multiple on-screen windows.
ActiveX	A technology and set of programming tools developed by Microsoft Corporation that enable software components written in different languages to interact with each another in a network environment or on a web page. The technology, based on object linking and embedding, enables Java applet-style functionality for Web browsers as well as other applications (Java is limited to Web browsers at this time). The ActiveX equivalent of a Java applet is an ActiveX control. These controls bring computational, communications, and data manipulation power to programs that can "contain" them—for example, certain Web browsers, Microsoft Office programs, and anything developed with Visual Basic or Visual C++.
activity	In Advanced Cost Accounting, an aggregation of actions performed within an organization that is used in activity-based costing.
activity driver	A measure of the frequency and intensity of the demands that are placed on activities by cost objects. An activity driver is used to assign costs to cost objects. It represents a line item on the bill of activities for a product or customer. An example is the number of part numbers, which is used to measure the consumption of material-related activities by each product, material type, or component. The number of customer orders measures the consumption of order-entry activities by each customer. Sometimes an activity driver is used as an indicator of the output of an activity, such as the number of purchase orders that are prepared by the purchasing activity. See also cost object.
activity rule	The criteria by which an object progresses from a given point to the next in a flow.
actual cost	Actual costing uses predetermined cost components, but the costs are accumulated at the time that they occur throughout the production process.
adapter	A component that connects two devices or systems, physically or electronically, and enables them to work together.
add mode	The condition of a form where a user can enter data into it.
advanced interactive executive	An open IBM operating system that is based on UNIX.
agent	A program that searches through archives or other repositories of information on a topic that is specified by the user.

aging	A classification of accounts by the time elapsed since the billing date or due date. Aging is divided into schedules or accounting periods, such as 0-30 days, 31-60 days, and so on.
aging schedule	A schedule that is used to determine whether a payment is delinquent and the number of days which the payment is delinquent.
allegato IVA clienti	In Italy, the term for the A/R Annual VAT report.
allegato IVA fornitori	In Italy, the term for the A/P Annual VAT report.
application layer	The seventh layer of the Open Systems Interconnection Reference Model, which defines standards for interaction at the user or application program level.
application programming interface (API)	A set of routines that is used by an application program to direct the performance of procedures by the computer's operating system.
AS/400 Common	A data source that resides on an AS/400 and holds data that is common to the co-existent library, allowing PeopleSoft EnterpriseOne to share information with PeopleSoft World.
assembly inclusion rule	A logic statement that specifies the conditions for using a part, adjusting the price or cost, performing a calculation, or using a routing operation for configured items.
audit trail	The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records and usually concludes with a report.
automatic return	A feature that allows a user to move to the next entry line in a detail area or to the first cell in the next row in several applications.
availability	The expression of the inventory amount that can be used for sales orders or manufacturing orders.
available inventory	The quantity of product that can be promised for sale or transfer at a particular time, considering current on-hand quantities, replenishments in process, and anticipated demand.
back office	The set of enterprise software applications that supports the internal business functions of a company.
backhaul	The return trip of a vehicle after delivering a load to a specified destination. The vehicle can be empty or the backhaul can produce less revenue than the original trip. For example, the state of Florida is considered a backhaul for many other states—that is, many trucking companies ship products into the state of Florida, but most of them cannot fill a load coming out of Florida or they charge less. Hence, trucks coming out of Florida are either empty or produce less revenue than the original trip.
balance forward	The cumulative total of inventory transactions that is used in the Running Balance program. The system does not store this total. You must run this program each time that you want to review the cumulative inventory transactions total.

balance forward receipt application method	A receipt application method in which the receipt is applied to the oldest or newest invoices in chronological order according to the net due date.
bank tape (lock box) processing	The receipt of payments directly from a customer's bank via customer tapes for automatic receipt application.
base location	[In package management] The topmost location that is displayed when a user launches the Machine Identification application.
basket discount	A reduction in price that applies to a group or "basket" of products within a sales order.
basket repricing	A rule that specifies how to calculate and display discounts for a group of products on a sales order. The system can calculate and display the discount as a separate sales order detail line, or it can discount the price of each item on a line-by-line basis within the sales order.
batch job	A job submitted to a system and processed as a single unit with no user interaction.
batch override	An instruction that causes a batch process to produce output other than what it normally would produce for the current execution only.
batch process	A type of process that runs to completion without user intervention after it has been started.
batch program	A program that executes without interacting with the user.
batch version	A version of a report or application that includes a set of user-defined specifications, which control how a batch process runs.
batch/lot tracking	The act of identifying where a component from a specific lot is used in the production of goods.
batch/mix	A manufacturing process that primarily schedules short production runs of products.
batch-of-one processing	A transaction method that allows a client application to perform work on a client workstation, and then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect, store-and-forward.
binary large object (BLOB)	A collection of binary data stored as a single entity in a [file].
binder clip	See paper clip.
black products	Products that are derived from the low or heavy end of the distillation process—for example, diesel oils and fuel oils. See also white products.
blend note	Document that authorizes a blending activity, and describes both the ingredients for the blend and the blending steps that occur.

blend off	Reworking off-specification material by introducing a small percentage back into another run of the same product.
blind execution	The mode of execution of a program that does not require the user to review or change the processing options set for the program, and does not require user intervention after the program has been launched.
boleto	In Brazil, the document requesting payment by a supplier or a bank on behalf of a supplier.
bolla doganale	VAT-Only Vouchers for Customs. In Italy, a document issued by the customs authority to charge VAT and duties on extra-EU purchasing.
bookmark	A shortcut to a location in a document or a specific place in an application or application suite.
bordero & cheque	In Brazil, bank payment reports.
broker	A program that acts as an intermediary between clients and servers to coordinate and manage requests.
BTL91	In the Netherlands, the ABN/AMRO electronic banking file format that enables batches with foreign automatic payment instructions to be delivered.
budgeted volume	A statement of planned volumes (capacity utilization) upon which budgets for the period have been set.
bunkering	A rate per ton or a sum of money that is charged for placing fuel on board; can also mean the operation itself.
business function	An encapsulated set of business rules and logic that can normally be re-used by multiple applications. Business functions can execute a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the APIs that allow them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	Encapsulated, reusable business logic that is created by using through event rules rather than C programming. Contrast with embedded event rule. See also event rule.
business object library	[In interoperability] The repository that stores EnterpriseOne business objects, which consist of Java or CORBA objects.
business unit	A financial entity that is used to track the costs, revenue, or both, of an organization. A business unit can also be defined as a branch/plant in which distribution and manufacturing activities occur. Additionally, in manufacturing setup, work centers and production lines must be defined as business units; but these business unit types do not have profit/loss capability.

business view	Used by EnterpriseOne applications to access data from database tables. A business view is a means for selecting specific columns from one or more tables with data that will be used in an application or report. It does not select specific rows and does not contain any physical data. It is strictly a view through which data can be handled.
business view design aid (BDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing business views. The tool uses a graphical user interface.
buy-back crude	In foreign producing oil countries, that portion of the host government's share of "participation crude" which it permits the company holding a concession to "buy back."
CAB	In Italy, the bank branch code or branch ID. A five-digit number that identifies any agency of a specific bank company in Italy.
cadastro de pessoas físicas	Cadastro de pessoas físicas. In Brazil, the federal tax ID for a person.
category code	A code that identifies a collection of objects sharing at least one common attribute.
central object	A software component that resides on a central server.
central objects merge	A process that blends a customer's modifications with the objects in a current release with objects in a new release.
central server	A computer that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers.
certificate input	See direct input.
certificate of analysis (COA)	A document that is a record of all of the testing which has been performed against an item, lot, or both, plus the test results for that item and lot.
change management	[In software development] A process that aids in controlling and tracking the evolution of software components.
change order	In PeopleSoft, an addendum to the original purchase order that reflects changes in quantities, dates, or specifications in subcontract-based purchasing. A change order is typically accompanied by a formal notification.
chargeback	A receipt application method that generates an invoice for a disputed amount or for the difference of an unpaid receipt.
chart	EnterpriseOne term for tables of information that appear on forms in the software. See forms.
check-in location	The directory structure location for the package and its set of replicated objects. This location is usually \\deploymentserver\release\path_code\package\packagename. The subdirectories under this path are where the central C components (source, include, object, library, and DLL file) for business functions are stored.

checksum value	A computed value that depends on the contents of a block of data, and that is transmitted or stored with the data to detect whether errors have occurred in the transmission or storage.
class	[In object-oriented programming] A category of objects that share the same characteristics.
clean cargo	Term that refers to cargoes of gasoline and other refined products. See also dirty cargo.
client access	The ability to access data on a server from a client machine.
client machine	Any machine that is connected to a network and that exchanges data with a server.
client workstation	A network computer that runs user application software and is able to request data from a server.
ClieOp03	In the Netherlands, the euro-compliant uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
ClieOp2	In the Netherlands, the uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
cluster	Two or more computers that are grouped together in such a way that they behave like a single computer.
co-existence	A condition where two or more applications or application suites access one or more of the same database tables within the same enterprise.
cold test	The temperature at which oil becomes solid. Generally considered to be 5 degrees F lower than the pour point.
commitment	The number of items that are reserved to fill demand.
common object request broker architecture	An object request broker standard that is endorsed by the Object Management Group.
compa-ratio	An employee’s salary divided by the midpoint amount for the employee’s pay grade.
component changeout	See component swap.
component object model (COM)	A specification developed by Microsoft for building software components that can be assembled into programs or add functionality to existing programs running on Microsoft Windows platforms. COM components can be written in a variety of languages, although most are written in C++, and can be unplugged from a program at runtime without having to recompile the program.

component swap	In Equipment/Plant Management, the substitution of an operable component for one that requires maintenance. Typically, you swap components to minimize equipment downtime while servicing one of the components. A component swap can also mean the substitution of one parent or component item for another in its associated bill of material.
conference room pilot environment	An EnterpriseOne environment that is used as a staging environment for production data, which includes constants and masters tables such as company constants, fiscal date patterns, and item master. Use this environment along with the test environment to verify that your configuration works before you release changes to end-users.
configurable network computing (CNC)	An application architecture that allows interactive and batch applications that are composed of a single code base to run across a TCP/IP network of multiple server platforms and SQL databases. The applications consist of re-usable business functions and associated data that can be configured across the network dynamically. The overall objective for businesses is to provide a future-proof environment that enables them to change organizational structures, business processes, and technologies independently of each other.
configurable processing engine	Handles all “batch” processes, including reporting, Electronic Data Exchange (EDIt) transactions, and data duplication and transformation (for data warehousing). This ability does not mean that it exists only on the server; it can be configured to run on desktop machines (Windows 95 and NT Workstation) as well.
configuration management	A rules-based method of ordering assemble-to-order or make-to-order products in which characteristics of the product are defined as part of the Sales Order Entry process. Characteristics are edited by using Boolean logic, and then translated into the components and routing steps that are required to produce the product. The resulting configuration is also priced and costed, based on the defined characteristics.
configured item segment	A characteristic of a configured item that is defined during sales order entry. For example, a customer might specify a type of computer hard drive by stating the number of megabytes of the hard drive, rather than a part number.
consuming location	The point in the manufacturing routing where a component or subassembly is used in the production process. In kanban processing, the location where the kanban container materials are used in the manufacturing process and the kanban is checked out for replenishment.
contra/clearing account	A G/L account used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations.
contribution to profit	Selling price of an item minus its variable costs.
control table	A table that controls the program flow or plays a major part in program control.
control table workbench	During the Installation Workbench process, Control Table Workbench runs the batch applications for the planned merges that update the data dictionary, user defined codes, menus, and user overrides tables.

control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
cost assignment	Allocating resources to activities or cost objects.
cost component	An element of an item's cost—for example, material, labor, or overhead.
cost object	Any customer, product, service, contract, project, or other work unit for which you need a separate cost measurement.
cost rollup	A simulated scenario in which work center rates, material costs, and labor costs are used to determine the total cost of an item.
costing elements	The individual classes of added value or conversion costs. These elements are typically materials, such as raw and packaging; labor and machine costs; and overhead, such as fixed and variable. Each corporation defines the necessary detail of product costs by defining and tracking cost categories and subcategories.
credit memo	A negative amount that is used to correct a customer's statement when he or she is overcharged.
credit notice	The physical document that is used to communicate the circumstances and value of a credit order.
credit order	A credit order is used to reflect products or equipment that is received or returned so that it can be viewed as a sales order with negative amounts. Credit orders usually add the product back into inventory. This process is linked with delivery confirmation.
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
crude oil assay	A procedure for determining the distillation curve and quality characteristics of a crude oil.
cumulative update	A version of software that includes fixes and enhancements that have been made since the last release or update.
currency relationships	When converting amounts from one currency to another, the currency relationship defines the from currency and the to currency in PeopleSoft software. For example, to convert amounts from German marks to the euro, you first define a currency relationship between those two currencies.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. It can be used, for example, when many currencies must be restated into a single currency for consolidated reporting.

current cost	The cost that is associated with an item at the time a parts list and routing are attached to a work order or rate schedule. Current cost is based on the latest bill of material and routing for the item.
customer pricing rules	In Procurement, the inventory pricing rules that are assigned to a supplier. In Sales, inventory pricing rules that are assigned to a customer.
D.A.S. 2 Reporting (DAS 2 or DADS 1)	In France, the name of the official form on which a business must declare fees and other forms of remuneration that were paid during the fiscal year.
data dictionary	A dynamic repository that is used for storing and managing a specific set of data item definitions and specifications.
data source workbench	During the Installation Workbench process, Data Source Workbench copies all of the data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System - release number data source. It also updates the Data Source Plan detail record to reflect completion.
data structure	A description of the format of records in a database such as the number of fields, valid data types, and so on.
data types	Supplemental information that is attached to a company or business unit. Narrative type contains free-form text. Code type contains dates, amounts, and so on.
datagram	A self-contained packet of information that is forwarded by routers, based on their address and the routing table information.
date pattern	A period of time that is set for each period in standard and 52-period accounting and forecasting.
DCE	See distributed computing environment.
DEB	See déclaration d'echange de biens.
debit memo	In Accounts Payable, a voucher that is entered with a negative amount. Enter this type of voucher when a supplier sends you a credit so that you can apply the amount to open vouchers when you issue payment to the supplier.
debit memo	A form that is issued by a customer, requesting an adjustment of the amount, which is owed to the supplier.
debit statement	A list of debit balances.
de-blend	When blend off does not result in a product that is acceptable to customers. The further processing of product to adjust specific physical and chemical properties to within specification ranges. See also blend off.
déclaration d'echange de biens (DEB)	The French term that is used for the Intrastat report.
delayed billing	The invoicing process is delayed until the end of a designated period.

delta load	A batch process that is used to compare and update records between specified environments.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail	The specific information that makes up a record or transaction. Contrast with summary.
detail information	Information that primarily relates to individual lines in a sales or purchase order.
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate, store-and-forward.
direct input	The system calculates the net units when you enter gross volume, temperature, and gravity or density. This data is generally entered during product receiving from the certificate that is prepared by an independent inspector.
direct ship orders	A purchase order that is issued to a third-party supplier who designates the destination as the customer. A direct ship sales order is also created for the customer. Direct ship orders occur when a product is not available from a company-owned or company-operated source, so the system creates an order to ship the product from a third-party source directly to the customer. Sometimes referred to as a drop ship or third-party supply.
direct usage	Consumption of resources that are attributable to specific production runs because the resources were directly issued to the schedule/order.
director	An EnterpriseOne user interface that guides a user interactively through an EnterpriseOne process.
dirty cargo	Term that refers to crude oil cargoes or other non-refined petroleum cargoes. See also clean cargo.
dispatch planning	Efficient planning and scheduling of product deliveries. Considerations include: Dispatch groups Scheduled delivery date Scheduled delivery time Preferred delivery date Preferred delivery time Average delivery time for that geographical location Available resources Special equipment requirements at the product’s source or destination.

displacement days	The number of days that are calculated from today's date by which you group vouchers for payment. For example, if today's date is March 10 and you specify three displacement days, the system includes vouchers with a due date through March 13 in the payment group. Contrast with pay-through date.
display sequence	A number that the system uses to re-order a group of records on the form.
distributed computing environment (DCE)	A set of integrated software services that allows software which is running on multiple computers to perform seamless and transparently to the end-users. DCE provides security, directory, time, remote procedure calls, and files across computers running on a network.
distributed data processing	Processing in which some of the functions are performed across two or more linked facilities or systems.
distributed database management system (DDBMS)	A system for distributing a database and its control system across many geographically dispersed machines.
do not translate (DNT)	A type of data source that must exist on the AS/400 because of BLOB restrictions.
double-byte character set (DBCS)	A method of representing some characters by using one byte and other characters by using two bytes. Double-byte character sets are necessary to represent some characters in the Japanese, Korean, and Chinese languages.
downgrade profile	A statement of the hierarchy of allowable downgrades. Includes substitutions of items, and meeting tighter specifications for those products with wider or overlapping specification ranges.
DTA	Datenträgeraustausch. A Swiss payment format that is required by Telekurs (Payserv).
dual pricing	To provide prices for goods and services in two currencies. During the euro transition period, dual pricing between the euro and Economic and Monetary Union (EMU) member currencies is encouraged.
dynamic link library (DLL)	A set of program modules that are designed to be invoked from executable files when the executable files are run, without having to be linked to the executable files. They typically contain commonly used functions.
dynamic partitioning	The ability to dynamically distribute logic or data to multiple tiers in a client/server architecture.
economy of scale	A phenomenon whereby larger volumes of production reduce unit cost by distributing fixed costs over a larger quantity. Variable costs are constant; but fixed costs per unit are reduced, thereby reducing total unit cost.
edit mode	A processing mode or condition where the user can alter the information in a form.
edit rule	A method that is used for formatting user entries, validating user entries, or both, against a predefined rule or set of rules.

embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field that is based on a processing option value, or calling a business function. Contrast with business function event rule. See also event rule.
employee work center	A central location for sending and receiving all EnterpriseOne messages (system and user-generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages. With respect to workflow, the Message Center is MAPI compliant and supports drag-and-drop work reassignment, escalation, forward and reply, and workflow monitoring. All messages from the message center can be viewed through EnterpriseOne messages or Microsoft Exchange.
Emulator	An item of software or firmware that allows one device to imitate the functioning of another.
encapsulation	The ability to confine access to and manipulation of data within an object to the procedures that contribute to the definition of that object.
engineering change order (ECO)	A work order document that is used to implement and track changes to items and resulting assemblies. The document can include changes in design, quantity of items required, and the assembly or production process.
enhanced analysis database	A database containing a subset of operational data. The data on the enhanced analysis database performs calculations and provides summary data to speed generation of reports and query response times. This solution is appropriate when external data must be added to source data, or when historical data is necessary for trend analysis or regulatory reporting. See also duplicated database, enterprise data warehouse.
enterprise server	A computer containing programs that collectively serve the needs of an enterprise rather than a single user, department, or specialized application.
EnterpriseOne object	A re-usable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects. See also object.
EnterpriseOne process	Allows EnterpriseOne clients and servers to handle processing requests and execute transactions. A client runs one process, and servers can have multiple instances of a process. EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes do not have to wait if the server is particularly busy.
EnterpriseOne web development computer	A standard EnterpriseOne Windows developer computer with the additional components installed: Sun’s JDK 1.1. JFC (0.5.1). Generator Package with Generator.Java and JDECOM.dll. R2 with interpretive and application controls/form.

environment workbench	During the Installation Workbench process, Environment Workbench copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System release number data source. It also updates the Environment Plan detail record to reflect completion.
equivalent fuel	A barrel of equivalent fuel supplies six million BTUs of heat. Fuel gas quantities are usually calculated as equivalent fuel barrels in economic calculations for refinery operations.
escalation monitor	A batch process that monitors pending requests or activities, and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.
ESR	Einzahlungsschein mit Referenznummer. A pay slip with a reference number.
event rule	[In EnterpriseOne] A logic statement that instructs the system to perform one or more operations that are based on an activity that can occur in a specific application, such as entering a form or exiting a field.
exit bar	[In EnterpriseOne] The tall pane with icons in the left portion of many EnterpriseOne program windows.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit.
fast path	[In EnterpriseOne] A command prompt that allows the user to move quickly among menus and applications by using specific commands.
file handle	A temporary reference (typically a number) that is assigned to a file which has been opened by the operating system and is used throughout the session to access the file.
file server	A computer that stores files to be accessed by other computers on the network.
find/browse	A type of form used to: Search, view, and select multiple records in a detail area. Delete records. Exit to another form. Serve as an entry point for most applications.
firm planned order (FPO)	A work order that has reached a user defined status. When this status is entered in the processing options for the various manufacturing programs, messages for those orders are not exploded to the components.
fiscal date pattern	A representation of the beginning date for the fiscal year and the ending date for each period in that year.
fix/inspect	A type of form used to view, add, or modify existing records. A fix/inspect form has no detail area.

fixed quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a fixed quantity relationship to its parent, the amount of the component does not change when the software calculates parts list requirements for different work order quantities. Contrast with variable quantity.
flexible account numbers	The format of account numbers for journal entries. The format that you set up must be the three segments: Business unit. Object. Subsidiary.
form design aid (FDA)	The EnterpriseOne GUI development tool for building interactive applications and forms.
form exit	[In EnterpriseOne] An option that is available as a button on the Form Exit bar or as a selection in the Form menu. It allows users to open an interconnected form.
form interconnection	Allows one form to access and pass data to another form. Form interconnections can be attached to any event; however, they are normally used when a button is clicked.
form type	The following form types are available in EnterpriseOne: Find/browse. Fix/inspect. Header detail. Headerless detail. Message. Parent/child. Search/select.
form-to-form call	A request by a form for data or functionality from one of the connected forms.
framework	[In object-oriented systems] A set of object classes that provide a collection of related functions for a user or piece of software.
frozen cost	The cost of an item, operation, or process after the frozen update program is run; used by the Manufacturing Accounting system.
frozen update program	A program that freezes the current simulated costs, thereby finalizing them for use by the Manufacturing Accounting system.
globally unique identifier (GUI)	A 16-byte code in the Component Object Model that identifies an interface to an object across all computers and networks.
handle	[In programming] A pointer that contains the address of another pointer, which, in turn, contains the address of the desired object.

hard commitment	The number of items that are reserved for a sales order, work order, or both, from a specific location, lot, or both.
hard error	An error that cannot be corrected by a given error detection and correction system.
header	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
header information	Information that pertains to the entire order.
hover help	A help function that provides contextual information or instructions when a cursor moves over a particular part of the interface element for a predefined amount of time.
ICMS	Imposto sobre circulação de mercadoria e servicos. In Brazil, a state tax that is applied to the movement of merchandise and some services.
ICMS Substituto	Imposto sobre circulacao de mercadoria e servicos substituto. In Brazil, the ICMS tax that is charged on interstate transactions, or on special products and clients.
ICMS Substituto-Markup	See imposto sobre circulação de mercadoria e servicos substituto-markup.
imposto de renda (IR)	Brazilian income tax.
imposto sobre produtos industrializados	In Brazil, a federal tax that applies to manufactured goods (domestic and imported).
imposto sobre services (ISS)	In Brazil, tax on services.
inbound document	A document that is received from a trading partner using Electronic Data Interface (EDI). This document is also referred to as an inbound transaction.
indented tracing	Tracking all lot numbers of intermediates and ingredients that are consumed in the manufacture of a given lot of product, down through all levels of the bill of material, recipe, or formula.
indexed allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a fixed percentage.
indirect measurement	Determining the quantity on-hand by: Measuring the storage vessels and calculating the content's balance quantity. or Theoretically calculating consumption of ingredients and deducting them from the on-hand balance.
indirect usage	Determining what should have been used by multiplying receipt quantity of the parent times the quantity per statement in the formula, recipe, or bill of material. This transaction typically affects both consumption on schedule as well as issue from on-hand balances.

in-process rework	Recycling a semi processed product that does not meet acceptable standards. Further processing takes the product out of a given operation and sends it back to the beginning of that operation or a previous operation (for example, unreacted materials). Rework that is detected prior to receipt of finished goods and corrected during the same schedule run.
INPS withholding tax	Instituto Nazionale di Previdenza Sociale withholding tax. In Italy, a 12% social security withholding tax that is imposed on payments to certain types of contractors. This tax is paid directly to the Italian social security office.
inscrição estadual	ICMS tax ID. In Brazil, the state tax ID.
inscrição municipal	ISS tax ID. In Brazil, the municipal tax ID.
integrated toolset	Unique to EnterpriseOne is an industrial-strength toolset that is embedded in the already comprehensive business applications. This toolset is the same toolset that is used by PeopleSoft to build EnterpriseOne interactive and batch applications. Much more than a development environment, however, the EnterpriseOne integrated toolset handles reporting and other batch processes, change management, and basic data warehousing facilities.
integrity test	A process that is used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interbranch sales order	A sales order that is used for transactions between branch/plants other than the selling branch/plant.
Interoperability	The ability of different computer systems, networks, operating systems, and applications to work together and share information.
inventory pricing rule	A discount method that is used for purchases from suppliers and sales to customers. The method is based on effectivity dates, up-to quantities, and a factor by which you can mark up or discount the price or cost.
inventory turn	The number of times that the inventory cycles, or turns over, during the year. A frequently used method to compute inventory turnover is to divide the annual costs of sales by the average inventory level.
invoice	An itemized list of goods that are shipped or services that are rendered, stating quantities, prices, fees, shipping charges, and so on. Companies often have their invoices mailed to a different address than where they ship products. In such cases, the bill-to address differs from the ship-to address.
IP	See imposto sobre produtos industrializados.
IR	See imposto de renda.
IServer Service	Developed by PeopleSoft, this Internet server service resides on the Web server and is used to speed up delivery of the Java class files from the database to the client.
ISS	See imposto sobre servicos.

jargon	An alternate data dictionary item description that EnterpriseOne or PeopleSoft World displays, based on the product code of the current object.
java application server	A component-based server that resides in the middle-tier of a server-centric architecture and provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that allows heterogeneous servers to access each other's data.
jde.ini	A PeopleSoft file (or member for AS/400) that provides the runtime settings that are required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine that is running EnterpriseOne, including workstations and servers.
JDE.LOG	The main diagnostic log file of EnterpriseOne. Always located in the root directory on the primary drive. Contains status and error messages from the startup and operation of EnterpriseOne.
JDEBASE Database Middleware	PeopleSoft proprietary database middleware package that provides two primary benefits: 1. Platform-independent APIs for multidatabase access. These APIs are used in two ways: a. By the interactive and batch engines to dynamically generate platform-specific SQL, depending on the data source request. b. As open APIs for advanced C business function writing. These APIs are then used by the engines to dynamically generate platform-specific SQL. 2. Client-to-server and server-to-server database access. To accomplish this access, EnterpriseOne is integrated with a variety of third-party database drivers, such as Client Access 400 and open database connectivity (ODBC).
JDECallObject	An application programming interface that is used by business functions to invoke other business functions.
JDEIPC	Communications programming tools that are used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.
JDENET	PeopleSoft proprietary middleware software. JDENET is a messaging software package.
JDENET communications middleware	PeopleSoft proprietary communications middleware package for EnterpriseOne. It is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all EnterpriseOne supported platforms.
just in time installation (JITI)	EnterpriseOne's method of dynamically replicating objects from the central object location to a workstation.
just in time replication (JITR)	EnterpriseOne's method of replicating data to individual workstations. EnterpriseOne replicates new records (inserts) only at the time that the user needs the data. Changes, deletes, and updates must be replicated using Pull Replication.

Kagami	In Japan, summarized invoices that are created monthly (in most cases) to reduce the number of payment transactions.
latitude	The X coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
laytime (or layhours)	The amount of time that is allotted to a tanker at berth to complete loading or discharging cargo. This time is usually expressed in running hours, and is fixed by prior agreement between the vessel owner and the company that is chartering the vessel. Laytime is stipulated in the charter, which states exactly the total of number of hours that are granted at both loading and unloading ports, and indicates whether such time is reversible. A statement of "Seventy-Two Hours, Reversible" means that a total of 72 hours is granted overall at both ports, and any time saved at one port can be applied as a credit at the other port. For example, if the vessel uses only 32 hours instead of 36 hours to load cargo, it can apply an additional four hours to the 36 hours allotted at the discharge port. Such considerations are important for purposes of computing demurrage.
leading zeros	A series of zeros that certain facilities in PeopleSoft systems place in front of a value that is entered. This situation normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers that you enter. The result appears as 00004567.
ledger type	A code that designates a ledger which is used by the system for a particular purpose. For example, all transactions are recorded in the AA (actual amounts) ledger type in their domestic currency. The same transactions can also be stored in the CA (foreign currency) ledger type.
level break	The position in a report or text where a group of similar types of information ends and another one begins.
libro IVA	Monthly VAT report. In Italy, the term for the report that contains the detail of invoices and vouchers that were registered during each month.
line of business	A description of the nature of a company's work; also a tool to control the relationship with that customer, including product pricing.
linked service type	A service type that is associated with a primary service type. Linked service types can be cancelled, and the maintenance tasks are performed when the primary service type to which they are linked comes due. You can specify whether the system generates work orders for linked service types, as well as the status that the system assigns to work orders that have already been generated. Sometimes referred to as associated service types. See also primary service type and service type.
livro razao	In Brazil, a general ledger report.
load balancing	The act of distributing the number of processes proportionally to all servers in a group to maximize overall performance.

location workbench	During the Installation Workbench process, Location Workbench copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.
log files	Files that track operations for a process or application. Reviewing log files is helpful for troubleshooting problems. The file extension for log files is .LOG.
logic data source	Any code that provides data during runtime.
logical compartment	One of two ways that is identified in the transportation constants to display compartments on vehicles. Logical display numbers the compartments sequentially. For example, if two vehicles are on a trip and each vehicle has three compartments, the logical display is 1,2,3,4,5,6.
logical file	A set of keys or indices that is used for direct access or ordered access to the records in a physical file. Several logical files can have different accesses to a physical.
logical shelf	A logical, not physical, location for inventory that is used to track inventory transactions in loan/borrow, or exchange agreements with other companies. See also logical warehouse.
logical warehouse	Not a physical warehouse containing actual inventory, but a means for storing and tracking information for inventory transactions in loan/borrow, or exchange agreements with other companies.
longitude	The Y coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
LSV	Lastschriftverfahren. A Swiss auto debit format that is required by Telekurs (Payserv).
mail merge	A mass-mail facility that takes names, addresses, and (sometimes) pertinent facts about recipients and merges the information into a form letter or a similarly basic document.
mailmerge workbench	[In EnterpriseOne] An application that merges Microsoft Word 6.0 (or higher) word-processing documents with EnterpriseOne records to automatically print business documents.
main fuels	Usually refers to bulk fuel products, but sometimes includes packaged products.
maintenance loop	See maintenance route.
maintenance route	A method of performing PMs for multiple pieces of equipment from a single preventive maintenance work order. A maintenance route includes pieces of equipment that share one or more identical maintenance tasks which can be performed at the same time for each piece of equipment. Sometimes referred to as maintenance loop.

maintenance work order	In PeopleSoft EnterpriseOne systems, a term that is used to distinguish work orders created for the performance of equipment and plant maintenance from other work orders, such as manufacturing work orders, utility work orders, and engineering change orders.
manufacturing and distribution planning	Planning that includes resource and capacity planning, and material planning operations. Resource and capacity planning allows you to prepare a feasible production schedule that reflects your demand forecasts and production capability. Material Planning Operations provides a short-range plan to cover material requirements that are needed to make a product.
mapping	A set of instructions that describes how one data structure passes data to another.
master business function	An interactive master file that serves as a central location for adding, changing, and updating information in a database.
master business function	A central system location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. Master business functions ensure uniform processing according to guidelines that you establish.
master table	A database table that is used to store data and information that is permanent and necessary to the system's operation. Master tables might contain data such as paid tax amounts, supplier names, addresses, employee information, and job information.
matching document	A document that is associated with an original document to complete or change a transaction. For example, a receipt is the matching document of an invoice.
media object	An electronic or digital representation of an object.
media storage objects	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
memory violation	An error that occurs as the result of a memory leak.
menu selection	An option on a menu that initiates a software function directly.
message center	A central location for sending and receiving all EnterpriseOne messages (system- and user-generated), regardless of the originating application or user.
messaging application programming interface (MAPI)	An architecture that defines the components of a messaging system and how they behave. It also defines the interface between the messaging system and the components.
metal content	A series of properties of a blended product that help to determine its suitability for a prescribed purpose.
metals management	The process of maintaining information about the location and status of durable product containers such as liquid petroleum gas (LPG) cylinders.
mobile inventory	Inventory that is transferred from a depot to a barge or truck for milk-run deliveries.

modal	A restrictive or limiting interaction that is created by a given condition of operation. Modal often describes a secondary window that restricts a user's interaction with other windows. A secondary window can be modal with respect to its primary window or to the entire system. A modal dialog box must be closed by the user before the application continues.
model work order	For scheduled preventive maintenance or for a condition-based alert, a model work order functions as a template for the creation of other work orders. You can assign model work orders to service types and condition-based alerts. When the service type comes due or the alert is generated, the system automatically generates a work order that is based on information from the model work order.
modeless	Not restricting or limiting interaction. Modeless often describes a secondary window that does not restrict a user's interaction with other windows. A modeless dialog box stays on the screen and is available for use at any time, but also permits other user activities.
multiple stocking locations	Authorized storage locations for the same item number at locations, in addition to the primary stocking location.
multitier architecture	A client/server architecture that allows multiple levels of processing. A tier defines the number of computers that can be used to complete some defined task.
named event rules (NER)	Also called business function event rules. Encapsulated, re-usable business logic that is created by using event rules, rather than C programming.
national language support (NLS)	Mechanisms that are provided to facilitate internationalization of both system and application user interfaces.
natureza da operação	Transaction nature. In Brazil, a code that classifies the type of commercial transaction to conform to the fiscal legislation.
negative pay item	An entry in an account that indicates a prepayment. For example, you might prepay a supplier before goods are sent or prepay an employee's forecasted expenses for a business trip. The system stores these pending entries, assigning them a minus quantity as debit amounts in a designated expense account. After the prepaid goods are received or the employee submits an expense report, entering the actual voucher clears all of the negative pay items by processing them as regular pay items. Note that a negative pay item can also result from entering a debit memo (A/P) or a credit memo (A/R).
net added cost	The cost to manufacture an item at the current level in the bill of material. Thus, for manufactured parts, the net added cost includes labor, outside operations, and cost extras applicable to this level in the bill of material, but not materials (lower-level items). For purchased parts, the net added cost also includes the cost of materials.
next status	The next step in the payment process for payment control groups. The next status can be either WRT (write) or UPD (update).
node	A termination point for two or more communications links. A node can serve as the control location for forwarding data among the elements of a network or multiple networks, as well as performing other networking and, in some cases, local processing.

non-inventory items	See non-stock items.
non-list price	A price for bulk products that is determined by its own algorithms, such as a rolling average or commodity price plus.
non-prime product	A manufactured product with revenue potential that is less than the product planned for, or scheduled to be produced.
non-stock items	Items that the system does not account for as part of the inventory. For example, office supplies, or packaging materials can be non-stock items.
nota fiscal	In Brazil, a legal document that must accompany all commercial transactions.
nota fiscal fatura	In Brazil, a nota fiscal and invoice information.
notula	In Italy, the process whereby a business does not recognize value added tax until the payment of a voucher.
object configuration manager (OCM)	EnterpriseOne's object request broker and the control center for the runtime environment. It keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, the Object Configuration Manager directs access to it by using defaults and overrides for a given environment and user.
object embedding	When an object is embedded in another document, an association is maintained between the object and the application that created it; however, any changes made to the object are also only kept in the compound document. See also object linking.
object librarian	A repository of all versions, applications, and business functions that are re-usable in building applications.
object linking	When an object is linked to another document, a reference is created with the file in which the object is stored, as well as with the application that created it. When the object is modified, either from the compound document or directly through the file in which it is saved, the change is reflected in that application as well as anywhere it has been linked. See also object embedding.
object linking and embedding (OLE)	A technology for transferring and sharing information among applications by allowing the integration of objects from diverse applications, such as graphics, charts, spreadsheets, text, or an audio clip from a sound program. OLE is a compound document standard that was developed by Microsoft Corporation. It enables you to create objects with one application, and then link or embed them in a second application. Embedded objects retain their original format and links to the application that created them. See also object embedding, object linking.
object management workbench (OMW)	The change management system that is used for EnterpriseOne development.

object-based technology (OBT)	A technology that supports some of the main principles of object-oriented technology: Classes. Polymorphism.I Inheritance. Encapsulation.
object-oriented technology (OOT)	Brings software development past procedural programming into a world of re-usable programming that simplifies development of applications. Object orientation is based on the following principles: Classes. Polymorphism.I Inheritance. Encapsulation.
offsetting account	An account that reduces the amount of another account to provide a net balance. For example, a credit of 200 to a cash account might have an offsetting entry of 200 to an A/P Trade (liability) account.
open database connectivity (ODBC)	Defines a standard interface for different technologies to process data between applications and different data sources. The ODBC interface comprises set of function calls, methods of connectivity, and representation of data types that define access to data sources.
open systems interconnection (OSI)	The OSI model was developed by the International Standards Organization (ISO) in the early 1980s. It defines protocols and standards for the interconnection of computers and network equipment.
order detail line	A part of an order that contains transaction information about a service or item being purchased or sold, such as quantity, cost, price, and so on.
order hold	A flag that stops the processing of an order because it has exceeded the credit or budget limit, or has another problem.
order-based pricing	Pricing strategy that grants reductions in price to a customer. It is based upon the contents and relative size (volume or value) of the order as a whole.
outbound document	A document that is sent to a trading partner using EDI. This term is also referred to as an outbound transaction.

outturn	The quantity of oil that is actually received into a buyer's storage tanks when a vessel is unloaded. For various reasons (vaporization, clingage to vessel tank walls, and so on), the amount of a product pumped into shore tankage at unloading is often less than the quantity originally loaded onto the vessel, as certified by the Bill of Lading. Under a delivered or CIF outturn transaction, the buyer pays only for the barrels actually "turned out" by the vessel into storage. When a buyer is paying CIF Bill of Lading figures, a loss of 0.5% of total cargo volume is considered normal. Losses in excess of 0.5%, however, are either chargeable to the seller or are covered by specialized insurance that covers partial, as well as total, loss of the cargo.
overhead	In the distillation process, that portion of the charge that leaves the top of the distillation column as vapor. This definition is strictly as it relates to ECS.
override conversion method	A method of calculating exchange rates that is set up between two specific currencies. For those specific currencies, this method overrides the conversion method in General Accounting Constants and does not allow inverse rates to be used when calculating currency amounts.
package / package build	A collection of software that is grouped into a single entity for modular installation. EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where the installation program can find them on the deployment server. It is a point-in-time "snapshot" of the central objects on the deployment server.
package location	The directory structure location for the package and its set of replicated objects. This location is usually \\deployment server\release\path_code\package\ package name. The replicated objects for the package are placed in the subdirectories under this path. This location is also where the package is built or stored.
package workbench	During the Installation Workbench process, Package Workbench transfers the package information tables from the Planner data source to the System - release number data source. It also updates the Package Plan detail record to reflect completion.
packaged products	Products that, by their nature, must be delivered to the customer in containers which are suitable for discrete consumption or resale.
pane/panel	A resizable subarea of a window that contains options, components, or other related information.
paper clip	An icon that is used to indicate that a media object is attached to a form or record.
parent/child form	A type of form that presents parent/child relationships in an application on one form: The left portion of the form presents a tree view that displays a visual representation of a parent/child relationship. The right portion of the form displays a detail area in browse mode. The detail area displays the records for the child item in the tree. The parent/child form supports drag and drop functionality.

parent/child relationship	See parent/component relationship.
parent/component relationship	1. In Capital Asset Management, the hierarchical relationship of a parent piece of equipment to its components. For example, a manufacturing line could be a parent and the machinery on the line could be components of the line. In addition, each piece of machinery could be a parent of still more components. 2. In Product Data Management, a hierarchical relationship of the components and subassemblies of a parent item to that parent item. For example, an automobile is a parent item; its components and subassemblies include: engine, frame, seats, and windows. Sometimes referred to as parent/child relationship.
partita IVA	In Italy, a company fiscal identification number.
pass-through	A process where data is accepted from a source and forwarded directly to a target without the system or application performing any data conversion, validation, and so on.
pay on consumption	The method of postponing financial liability for component materials until you issue that material to its consuming work order or rate schedule.
payment group	A system-generated group of payments with similar information, such as a bank account. The system processes all of the payments in a payment group at the same time.
PeopleSoft database	See JDEBASE Database Middleware.
performance tuning	The adjustments that are made for a more efficient, reliable, and fast program.
persistent object	An object that continues to exist and retains its data beyond the duration of the process that creates it.
pervasive device	A type of intelligent and portable device that provides a user with the ability to receive and gather information anytime, from anywhere.
planning family	A means of grouping end items that have similarity of design or manufacture.
plug-in	A small program that plugs into a larger application to provide added functionality or enhance the main application.
polymorphism	A principle of object-oriented technology in which a single mnemonic name can be used to perform similar operations on software objects of different types.
portal	A Web site or service that is a starting point and frequent gateway to a broad array of on-line resources and services.
Postfinance	A subsidiary of the Swiss postal service. Postfinance provides some banking services.

potency	Identifies the percent of an item in a given solution. For example, you can use an 80% potent solution in a work order that calls for 100% potent solution, but you would use 25% more, in terms of quantity, to meet the requirement (100 / 80 = 1.25).
preference profile	The ability to define default values for specified fields for a user defined hierarchy of items, item groups, customers, and customer groups. In Quality Management setup, this method links test and specification testing criteria to specific items, item groups, customers, or customer groups.
preflush	A work order inventory technique in which you deduct (relieve) materials from inventory when the parts list is attached to the work order or rate schedule.
preventive maintenance cycle	The sequence of events that make up a preventive maintenance task, from its definition to its completion. Because most preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.
preventive maintenance schedule	The combination of service types that apply to a specific piece of equipment, as well as the intervals at which each service type is scheduled to be performed.
primary service type	A service type to which you can link related service types. For example, for a particular piece of equipment, you might set up a primary service type for a 1000-hour inspection and a linked service type for a 500-hour inspection. The 1000-hour inspection includes all of the tasks performed at 500 hours. When a primary service type is scheduled to be performed, the system schedules the linked service type. See also linked service type.
pristine environment	An EnterpriseOne environment that is used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so you can compare pristine objects that you modify.
processing option	A data structure that allows users to supply parameters that regulate the execution of a batch program or report.
product data management (PDM)	In PeopleSoft EnterpriseOne software, the system that enables a business to organize and maintain information about each item which it manufactures. Features of this system, such as bills of material, work centers, and routings, define the relationships among parents and components, and how they can be combined to manufacture an item. PDM also provides data for other manufacturing systems including Manufacturing Accounting, Shop Floor Management, and Manufacturing and Distribution Planning.
product line	A group of products with similarity in manufacturing procedures, marketing characteristics, or specifications that allow them to be aggregated for planning; marketing; and, occasionally, costing.
product/process definition	A combination of bill of material (recipe, formula, or both) and routing (process list). Organized into tasks with a statement of required consumed resources and produced resources.
production environment	An EnterpriseOne environment in which users operate EnterpriseOne software.

program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or diskettes.
project	[In EnterpriseOne] A virtual container for objects being developed in Object Management Workbench.
projected cost	The target expenditure in added value for material, labor, and so on, during manufacture. See also standard cost.
promotion path	The designated path for advancing objects or projects in a workflow.
protocollo	See registration number.
PST	Provincial sales tax. A tax that is assessed by individual provinces in Canada.
published table	Also called a “Master” table, this is the central copy to be replicated to other machines and resides on the “publisher” machine. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers that use EnterpriseOne’s data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the Data Replication Pending Change Notification table (F98DRPCN).
query by example (QBE)	Located at the top of a detail area, this area is used to search for data to display in the detail area.
rate scheduling	A method of scheduling product or manufacturing families, or both. Also a technique to determine run times and quantities of each item within the family to produce enough of each individual product to satisfy demand until the family can be scheduled again.
rate type	For currency exchange transactions, the rate type distinguishes different types of exchange rates. For example, you can use both period average and period-end rates, distinguishing them by rate type.
real-time	Pertaining to information processing that returns a result so rapidly that the interaction appears to be instantaneous.
receipt routing	A series of steps that is used to track and move items within the receipt process. The steps might include in-transit, dock, staging area, inspection, and stock.
referential integrity	Ensures that a parent record cannot be deleted from the database when a child record for exists.

regenerable	Source code for EnterpriseOne business functions can be regenerated from specifications (business function names). Regeneration occurs whenever an application is recompiled, either for a new platform or when new functionality is added.
register types and classes	In Italian VAT Summary Reporting, the classification of VAT transactions.
relationship	Links tables together and facilitates joining business views for use in an application or report. Relationships that are created are based on indexes.
rélevé d'identité bancaire (RIB)	In France, the term that indicates the bank transit code, account number, and check digit that are used to validate the bank transit code and account number. The bank transit code consists of the bank code and agency code. The account number is alphanumeric and can be as many as 11 characters. PeopleSoft supplies a validation routine to ensure RIB key correctness.
remessa	In Brazil, the remit process for A/R.
render	To include external data in displayed content through a linking mechanism.
repasse	In Brazil, a discount of the ICMS tax for interstate transactions. It is the adjustment between the interstate and the intrastate ICMS tax rates.
replenishment point	The location on or near the production line where additional components or subassemblies are to be delivered.
replication server	A server that is responsible for replicating central objects to client machines.
report design aid (RDA)	The EnterpriseOne GUI tool for operating, modifying, and copying report batch applications.
repost	In Sales, the process of clearing all commitments from locations and restoring commitments, based on quantities from the Sales Order Detail table (F4211).
resident	Pertaining to computer programs or data while they remain on a particular storage device.
retorno	In Brazil, the receipt process for A/R.
RIB	See rélevé d'identité bancaire.
ricevute bancarie (RiBa)	In Italy, the term for accounts receivable drafts.
riepilogo IVA	Summary VAT monthly report. In Italy, the term for the report that shows the total amount of VAT credit and debit.
ritenuta d'acconto	In Italy, the term for standard withholding tax.
rollback	[In database management] A feature or command that undoes changes in database transactions of one or more records.
rollup	See cost rollup.

row exit	[In EnterpriseOne] An application shortcut, available as a button on the Row Exit bar or as a menu selection, that allows users to open a form that is related to the highlighted grid record.
runtime	The period of time when a program or process is running.
SAD	The German name for a Swiss payment format that is accepted by Postfinance.
SAR	See software action request.
scalability	The ability of software, architecture, hardware, or a network to support software as it grows in size or resource requirements.
scripts	A collection of SQL statements that perform a specific task.
scrub	To remove unnecessary or unwanted characters from a string.
search/select	A type of form that is used to search for a value and return it to the calling field.
selection	Found on PeopleSoft menus, selections represent functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
serialize	To convert a software object into a stream of bytes to store on a disk or transfer across a network.
server map	The server view of the object configuration mapping.
server workbench	During the Installation Workbench process, Server Workbench copies the server configuration files from the Planner data source to the System release number data source. It also updates the Server Plan detail record to reflect completion.
service interval	The frequency at which a service type is to be performed. Service intervals can be based on dates, periods, or statistical units that are user defined. Examples of statistical units are hours, miles, and fuel consumption.
service type	An individual preventive maintenance task or procedure, such as an inspection, lubrication, or overhaul. Service types can apply to a specific piece of equipment or to a class of equipment. You can specify that service types come due based on a predetermined service interval, or whenever the task that is represented by the service type becomes necessary.
servlet	A [small] program that extends the functionality of a Web server by generating dynamic content and interacting with Web clients by using a request-response paradigm.
share path	The network node under which one or more servers or objects reside.
shop floor management	A system that uses data from multiple system codes to help develop, execute, and manage work orders and rate schedules in the enterprise.
silent mode	A method for installing or running a program that does not require any user intervention.

silent post	A type of post that occurs in the background without the knowledge of the user.
simulated cost	After a cost rollup, the cost of an item, operation, or process according to the current cost scenario. This cost can be finalized by running the frozen update program. You can create simulated costs for a number of cost methods—for example, standard, future, and simulated current costs. See also cost rollup.
single-byte character set (SBCS)	An encoding scheme in which each alphabetic character is represented by one byte. Most Western languages, such as English, can be represented by using a single-byte character set.
single-level tracking	Finding all immediate parents where a specific lot has been used (consumed).
single-voyage (spot) charter	An agreement for a single voyage between two ports. The payment is made on the basis of tons of product delivered. The owner of the vessel is responsible for all expenses.
slimer	A script that changes data in a table directly without going through a regular database interface.
smart field	A data dictionary item with an attached business function for use in the Report Design Aid application.
SOC	The Italian term for a Swiss payment format that is accepted by Postfinance.
soft commitment	The number of items that is reserved for sales orders or work orders in the primary units of measure.
soft error	An error from which an operating system or program is able to recover.
software action request (SAR)	An entry in the AS/400 database that is used for requesting modifications to PeopleSoft software.
SOG	The French term for a Swiss payment format that is accepted by Postfinance.
source directory	The path code to the business function source files belonging to the shared library that is created on the enterprise server.
special period/year	The date that determines the source balances for an allocation.
specification merge	The Specification merge is comprised of three merges: Object Librarian merge (via the Object Management Workbench). Versions List merge. Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification table merge workbench	During the Installation Workbench process, Specification Table Merge Workbench runs the batch applications that update the specification tables.

specifications	A complete description of an EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
spot charter	See single-voyage charter.
spot rates	An exchange rate that is entered at the transaction level. Spot rates are not used on transactions between two EMU member currencies because exchange rates are irrevocably fixed to the euro.
stamp tax	In Japan, a tax that is imposed on drafts payable, receipts over 30000 Japanese yen, and all contracts. The party that issues any of the above documents is responsible for this tax.
standalone	Operating or capable of operating independently of certain other components of a computer system.
standard cost	The expected, or target cost of an item, operation, or process. Standard costs represent only one cost method in the Product Costing system. You can also calculate, for example, future costs or current costs. However, the Manufacturing Accounting system uses only standard frozen costs.
standard costing	A costing method that uses cost units that are determined before production. For management control purposes, the system compares standard costs to actual costs and computes variances.
subprocess	A process that is triggered by and is part of a larger process, and that generally consists of activities.
subscriber table	The Subscriber table (F98DRSUB), which is stored on the Publisher Server with the Data Replication Publisher table (F98DRPUB), that identifies all of the subscriber machines for each published table.
summary	The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many systems offer forms and reports that summarize information which is stored in certain tables. Contrast with detail.
super backflush	To create backflush transactions for material, labor, or both, against a work order at predefined pay points in the routing. By doing so, you can relieve inventory and account for labor amounts at strategic points throughout the manufacturing process.
supersession	Specification that a new product is replacing an active product on a specified effective date.
supplemental data	Additional types of data for customers and suppliers. You can enter supplemental data for information such as notes, comments, plans, or other information that you want in a customer or supplier record. The system maintains this data in generic databases, separate from the standard master tables (Customer Master, Supplier Master, and Address Book Master).

supplying location	The location from which inventory is transferred once quantities of the item on the production line have been depleted. In kanban processing, the supplying location is the inventory location from which materials are transferred to the consuming location when the containers are replenished.
system code	A numeric or alphanumeric designation that identifies a specific system in EnterpriseOne software.
system function	[In EnterpriseOne] A named set of pre-packaged, re-usable instructions that can be called from event rules.
table access management (TAM)	The EnterpriseOne component that handles the storage and retrieval of user defined data. TAM stores information such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
table conversion workbench	During the Installation Workbench process, Table Conversion Workbench runs the table conversions that change the technical and application tables to the format for the new release of EnterpriseOne. It also updates the Table Conversions and Controls detail records to reflect completion.
table design aid (TDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing database tables.
table event rules	Use table event rules to attach database triggers (or programs) that automatically run whenever an action occurs against the table. An action against a table is referred to as an event. When you create an EnterpriseOne database trigger, you must first determine which event will activate the trigger. Then, use Event Rules Design to create the trigger. Although EnterpriseOne allows event rules to be attached to application events, this functionality is application-specific. Table event rules provide embedded logic at the table level.
table handle	A pointer into a table that indicates a particular row.
table space	[In relational database management systems] An abstract collection of containers in which database objects are stored.
task	[In Solution Explorer and EnterpriseOne Menu] A user defined object that can initiate an activity, process, or procedure.
task view	A group of tasks in Solution Explorer or EnterpriseOne Menu that are arranged in a tree structure.
termo de abertura	In Brazil, opening terms for the transaction journal.
termo de encerramento	In Brazil, closing terms for the transaction journal.
three-tier processing	The task of entering, reviewing, approving, and posting batches of transactions.
three-way voucher match	The process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records, the purchase order, and the invoice to create vouchers.

threshold percentage	In Capital Asset Management, the percentage of a service interval that you define as the trigger for maintenance to be scheduled. For example, you might set up a service type to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.
throughput agreement	A service agreement in which a business partner agrees to store and manage product for another business partner for a specified time period. The second partner actually owns the stock that is stored in the first partner's depot, although the first partner monitors the stock level; suggests replenishments; and unloads, stores, and delivers product to the partner or its customers. The first partner charges a fee for storing and managing the product.
throughput reconciliation	Reconcile confirmed sales figures in a given period with the measured throughput, based on the meter readings. This process is designed to catch discrepancies that are due to transactions not being entered, theft, faulty meters, or some combination of these factors. This reconciliation is the first stage. See also operational reconciliation.
token	[In Object Management Workbench] A flag that is associated with each object which indicates whether you can check out the object.
tolerance range	The amount by which the taxes that you enter manually can vary from the tax that is calculated by the system.
TP monitor	Transaction Processing monitor. A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and can include programs that validate data and format terminal screens.
tracing	The act of researching a lot by going backward, to discover its origin.
tracking	The act of researching a lot by going forward, to discover where it is used.
transaction set	An electronic business transaction (EDI Standard document) composed of segments.
transclude	To include the external data in the displayed content through a linking mechanism.
transfer order	An order that is used to ship inventory between branch/plants within your company and to maintain an accurate on-hand inventory amount. An interbranch transfer order creates a purchase order for the shipping location and a sales order for the receiving location.
translation adjustment account	An optional G/L account used in currency balance restatement to record the total adjustments at a company level.
translator software	The software that converts data from an application table format to an EDI Standard Format, and from EDI Standard Format to application table format. The data is exchanged in an EDI Standard, such as ANSI ASC X12, EDIFACT, UCS, or WINS.

tree structure	A type of graphical user interface that displays objects in a hierarchy.
trigger	Allows you to attach default processing to a data item in the data dictionary. When that data item is used on an application or report, the trigger is invoked by an event which is associated with the data item. EnterpriseOne also has three visual assist triggers: Calculator. Calendar. Search form.
two-way voucher match	The process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
universal batch engine (UBE)	[In EnterpriseOne] A type of application that runs a noninteractive process.
unnormalized	Data that is a random collection of data elements with repeating record groups scattered throughout. Also see Normalized.
user overrides merge	The User Overrides merge adds new user override records into a customer's user override table.
user-defined code (UDC)	A value that a user has assigned as being a valid entry for a given or specific field.
utility	A small program that provides an addition to the capabilities which are provided by an operating system.
variable numerator allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a variable.
variable quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a variable quantity relationship to its parent, the amount of the component changes when the software calculates parts list requirements for different work order quantities. Contrast with fixed quantity.
variance	1. In Product Costing and Manufacturing Accounting, the difference between the frozen standard cost, the current cost, the planned cost, and the actual cost. For example, the difference between the frozen standard cost and the current cost is an engineering variance. Frozen standard costs come from the Cost Components table, and the current costs are calculated by using the current bill of material, routing, and overhead rates. 2. In Capital Asset Management, the difference between revenue that is generated by a piece of equipment and costs that are incurred by the equipment.
versions list merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release as well as their processing options data.
VESR	Verfahren Einzahlungsschein mit Referenznummer. The processing of an ESR pay slip with reference line through accounts receivable and accounts payable.

visual assist	Forms that can be invoked from a control to assist the user in determining what data belongs in the control.
voucher logging	The process of entering vouchers without distributing amounts to specific G/L accounts. The system initially distributes the total amount of each voucher to a G/L suspense account, where it is held until you redistribute it to the correct G/L account.
wareki date format	In Japan, a calendar format, such as Showa or Heisei. When a new emperor begins to reign, the government chooses the title of the date format and the year starts over at one. For instance, January 1, 1998, is equal to Heisei 10, January 1st.
wash down	A minor cleanup between similar product runs. Sometimes used in reference to the sanitation process of a food plant.
wchar_t	An internal type of a wide character. Used for writing portable programs for international markets.
web server	A server that sends information as requested by a browser and uses the TCP/IP set of protocols.
work order life cycle	In Capital Asset Management, the sequence of events through which a work order must pass to accurately communicate the progress of the maintenance tasks that it represents.
workfile	A system-generated file that is used for temporary data processing.
workflow	According to the Workflow Management Coalition, worlflow means “the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.”
workgroup server	A network server usually containing subsets of data that are replicated from a master network server.
WorldSoftware architecture	The broad spectrum of application design and programming technology that PeopleSoft uses to achieve uniformity, consistency, and complete integration throughout its software.
write payment	A step in processing payments. Writing payments includes printing checks, drafts, and creating a bank tape table.
write-off	A method for getting rid of inconsequential differences between amounts. For example, you can apply a receipt to an invoice and write off the difference. You can write off both overpayments and underpayments.

Z file	For store and forward (network disconnected) user, EnterpriseOne store-and-forward applications perform edits on static data and other critical information that must be valid to process an order. After the initial edits are complete, EnterpriseOne stores the transactions in work tables on the workstation. These work table are called Z files. When a network connection is established, Z files are uploaded to the enterprise server; and the transactions are edited again by a master business function. The master business function then updates the records in your transaction files.
z-process	A process that converts inbound data from an external system into an EnterpriseOne software table or converts outbound data into an interface table for an external system to access.
zusammenfassende melding	In Germany, the term for the EU Sales Listing.

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