PeopleSoft®

# PeopleSoft EnterpriseOne Condition-Based Maintenance 8.11 SP1 PeopleBook

**August 2005**

PeopleSoft EnterpriseOne Condition-Based Maintenance 8.11 SP1 PeopleBook
SKU E1_APPS811SP1ACO-B 0805

# Contents

# About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

**Note.** PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element 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. Elements that are common to all PeopleSoft applications are defined in this preface.

## PeopleSoft Application Prerequisites

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

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 PeopleSoft applications most effectively.

## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

**Note.** Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

# Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

## 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'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

**Important!** 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, https://www.peoplesoft.com/corp/en/login.jsp

## Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

### Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

### Telephone

Contact MMA Partners at 877 588 2525.

### Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

### See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

## Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

| Resource | Navigation |
|---|---|
| Application maintenance information | Updates + Fixes |
| Business process diagrams | Support, Documentation, Business Process Maps |
| Interactive Services Repository | Interactive Services Repository |
| Hardware and software requirements | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements |
| Installation guides | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes |
| Integration information | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications |
| Minimum technical requirements (MTRs) (EnterpriseOne only) | Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms |
| PeopleBook documentation updates | Support, Documentation, Documentation Updates |
| PeopleSoft support policy | Support, Support Policy |
| Prerelease notes | Support, Documentation, Documentation Updates, Category, Prerelease Notes |
| Product release roadmap | Support, Roadmaps + Schedules |
| Release notes | Support, Documentation, Documentation Updates, Category, Release Notes |

| Resource | Navigation |
|---|---|
| Release value proposition | Support, Documentation, Documentation Updates, Category, Release Value Proposition |
| Statement of direction | Support, Documentation, Documentation Updates, Category, Statement of Direction |
| Troubleshooting information | Support, Troubleshooting |
| Upgrade documentation | Support, Documentation, Upgrade Documentation and Scripts |

# Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

## Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

| Typographical Convention or Visual Cue | Description |
|---|---|
| **Bold** | Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call. |
| *Italics* | Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.<br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*. |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key. |
| `Monospace font` | Indicates a PeopleCode program or other code example. |

| Typographical Convention or Visual Cue | Description |
|---|---|
| “ ” (quotation marks) | Indicate chapter titles in cross-references and words that are used differently from their intended meanings. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( \| ). |
| [ ] (square brackets) | Indicate optional items in PeopleCode syntax. |
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br>Ampersands also precede all PeopleCode variables. |

# Visual Cues

PeopleBooks contain the following visual cues.

## Notes

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

**Note.** Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

**Important!** Example of an important note.

## Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

***Warning!*** Example of a warning.

## Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

## Currency Codes

Monetary amounts are identified by the ISO currency code.

# 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 send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

# Common Elements Used in PeopleBooks

**Address Book Number** Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

**As If Currency Code** Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

**Batch Number** Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

**Batch Date** Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

**Batch Status** Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

*Blank:* Batch is unposted and pending approval.

*A:* The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.

*D:* The batch posted successfully.

*E:* The batch is in error. You must correct the batch before it can post.

*P:* The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E.

*U:* The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

**Branch/Plant** Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

**Business Unit** Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

**Category Code** Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

**Company** Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

**Currency Code**

Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

**Document Company**

Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

**Document Number**

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

**Document Type**

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

*P:* Accounts payable documents.

*R:* Accounts receivable documents.

*T:* Time and pay documents.

*I:* Inventory documents.

*O:* Purchase order documents.

*S:* Sales order documents.

**Effective Date**

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

**Fiscal Period** and **Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

**G/L Date** (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

# PeopleSoft EnterpriseOne Condition-Based Maintenance Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft application fundamentals.
- Common elements used in this PeopleBook.

## PeopleSoft Products

This PeopleBook refers to the PeopleSoft product: PeopleSoft EnterpriseOne Condition-Based Maintenance.

## PeopleSoft Application Fundamentals

Additional, essential information describing the setup and design of the system appears in a companion volume of documentation called *PeopleSoft EnterpriseOne FMS Application Fundamentals*

## Common Elements Used in this PeopleBook

**Alert Level**

Enter a code to indicate the functional status of a piece of equipment, as assessed by a condition-based maintenance system. For maintenance schedules that are condition-based, the preventive maintenance system uses this code to determine whether maintenance is due. Enter a value from user-defined code (UDC) table 13/AL (Alert Level).

This field enables you to further define the message rule to determine who gets notification or investigation messages for each alert level. If you have not defined a message rule that is specific to an alert level, leave this field blank to define a message rule that you can use for any alert level.

**Alert Status**

Enter a value from UDC 13/AS (Alert Status) that indicates the status of a condition-based alert.

**Investigation Recipient**

Enter an address book number to identify the recipient of an alert investigation request. This number can be a single person or a distribution list. The system verifies this number against the Address Book.

**Investigation Structure Type**

Enter a code to identify a type of organizational structure that has its own hierarchy in the Address Book system (for example, email). Values are defined in UDC 01/TS (Parent/Child Structure Type).

**Notification Recipient** Enter an address book number to identify the recipient of an alert notification message. This number can be a single person or a distribution list. The system verifies this number against the Address Book.

**Notification Structure Type** Enter a code to identify a type of organizational structure that has its own hierarchy in the Address Book system (for example, email). Values are defined in UDC 01/TS (Parent/Child Structure Type).

# CHAPTER 1

# Getting Started with PeopleSoft EnterpriseOne Condition-Based Maintenance

This chapter discusses:

- Condition-based maintenance overview
- Condition-based maintenance integrations
- Condition-based maintenance implementation

## Condition-Based Maintenance Overview

Unplanned downtime can create a huge dent in a company's productivity and profitability. That's why it is so important to keep equipment in top working condition. Traditional maintenance programs are no longer sufficient; companies must be able to find and fix problems before they cause equipment breakdowns.

PeopleSoft EnterpriseOne Condition-Based Maintenance (CBM) enables you to make maintenance decisions based on actual condition, rather than time or usage interval. You can identify equipment problems early, when they are less costly to correct, and perform maintenance only when needed, thereby increasing asset utilization, extending equipment life, and reducing maintenance costs. Condition-Based Maintenance:

- Uses alerts generated from realtime equipment monitoring devices that assess equipment conditions against predefined, normal operation parameters.
- Provides realtime alerts (using pager, email, or other messaging systems) when equipment is operating outside of normal bounds so appropriate maintenance action can be taken.
- Automatically initiates appropriate maintenance action, including investigation, creation of a work order, and CBM schedule updates.

## Condition-Based Maintenance Integrations

The Condition-Based Maintenance system integrates with the PeopleSoft EnterpriseOne Capital Asset Management system using these modules:

- Work Order module
- Preventive Maintenance module

The Condition-Based Maintenance system works with other PeopleSoft EnterpriseOne systems to ensure that all information is fully integrated. We discuss integration considerations in the implementation chapters in this PeopleBook. Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

### Capital Asset Management

The Capital Asset Management system enables you to maintain and service equipment using the right mix of reactive, preventive, and predictive maintenance. This enables you to provide the required equipment reliability at the lowest possible cost.

# Condition-Based Maintenance Implementation

This section provides an overview of the steps that are required to implement Condition-Based Maintenance.

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About these PeopleBooks* with information about where to find the most current version of each.

## Global Implementation Steps

This table lists the suggested global implementation steps for Condition-Based Maintenance:

| Step | Reference |
|---|---|
| 1. Set up companies, fiscal date patterns, and business units. | *PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 SP1 PeopleBook*, "Setting Up Organizations" |
| 2. Set up accounts, and the chart of accounts. | *PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 SP1 PeopleBook*, "Setting Up Bank Accounts" and *PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 SP1 PeopleBook*, "Creating the Chart of Accounts" |
| 3. Set up the General Accounting constants. | *PeopleSoft EnterpriseOne General Accounting 8.11 SP1 PeopleBook*, "Setting Up the General Accounting System" |
| 4. Set up multicurrency processing, including currency codes and exchange rates. | *PeopleSoft EnterpriseOne Multicurrency Processing 8.11 SP1 PeopleBook*, "Setting Up General Accounting for Multicurrency Processing" and *PeopleSoft EnterpriseOne Multicurrency Processing 8.11 SP1 PeopleBook*, "Setting Up Exchange Rates" |
| 5. Set up ledger type rules. | *PeopleSoft EnterpriseOne General Accounting 8.11 SP1 PeopleBook*, "Setting Up the General Accounting System," Setting Up Ledger Type Rules for General Accounting |
| 6. Enter address book records. | *PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook*, "Entering Address Book Records" |
| 7. Set up equipment master records. | *PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook*, "Setting Up Equipment" |

| Step | Reference |
|---|---|
| 8. Set up preventive maintenance schedules. | *PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook*, "Setting Up Preventive Maintenance" |
| 9. Set up work orders. | *PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook*, "Setting Up Work Orders" |
| 10. Set up sequences for notification and investigation messages. | Chapter 2, "Setting Up Condition-Based Maintenance," Setting Up Sequences for Notification and Investigation Messages, page 5 |
| 11. Set up rules for notification and investigation messages. | Chapter 2, "Setting Up Condition-Based Maintenance," Setting Up Rules for Notification and Investigation Messages, page 7 |

# CHAPTER 2

# Setting Up Condition-Based Maintenance

This chapter provides an overview of condition-based maintenance setup and discusses how to:

- Set up sequences for notification and investigation messages.
- Set up rules for notification and investigation messages.
- Run conversion programs.

## Understanding Condition-Based Maintenance Setup

Before you can use the features of condition-based maintenance (CBM), you need to define the information that is critical for system processes.

In addition to the setup topics that are included in this guide, refer to topics in these guides for additional setup and update options:

### See Also

*PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook*, "Setting Up Work Orders"

*PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook*, "Setting Up Preventive Maintenance"

*PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook*, "Working with Preventive Maintenance Schedules"

*PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Workflow Tools*

## Setting Up Sequences for Notification and Investigation Messages

This section provides an overview of sequencing for notification and investigation messages and discusses how to:

- Set processing options for CBM message sequences.
- Set up sequences.

# Understanding Sequencing for Notification and Investigation Messages

Use the Condition-Based Maintenance Message Sequences program (P1315) to define the search sequences that the system uses to select the message rule which determines the alert message recipients. The hierarchy determines the order in which the system searches for message recipients.

You can use a processing option to specify whether to enter message sequences for a notification process or for an investigation process. Notification messages warn or alert managers (such as production, shipping, and plant supervisors) of a problem. Investigation messages request that a plant engineer investigate the problem and report findings back to the message originator.

Considerations:

- Set up the hierarchy from specific to general.
- For performance reasons, set up only the necessary message sequences.
- The workflow process CBMNOTIFY supports sending a notification message to an individual recipient or a distribution list.
- The workflow process CBMINVEST supports sending an investigation message to an individual recipient or a distribution list.

### See Also

Appendix A, "Delivered Workflow for PeopleSoft EnterpriseOne Condition-Based Maintenance," page 29

*PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Workflow Tools*

# Forms Used to Set Up Sequences for Notification and Investigation Messages

| Form Name | FormID | Navigation | Usage |
|---|---|---|---|
| Condition-Based Maintenance Message Sequences | W1315A | Condition-Based Maintenance Setup (G13CBM41), Notification Message Sequences<br><br>Condition-Based Maintenance Setup (G13CBM41), Investigation Message Sequences | Set up message sequences for notification and investigation messages. |

# Setting Processing Options for Condition-Based Maintenance Message Sequences (P1315)

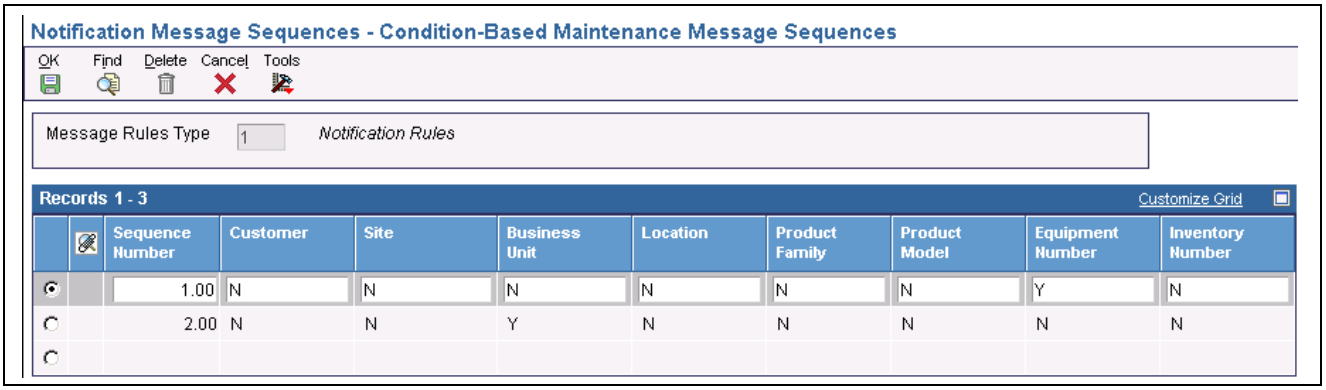
Processing options enable you to specify the default processing for programs and reports.

### Defaults

**1. Message Rules Type** Specify the message rules type. Values are listed in user-defined code (UDC) 13/TY (Message Rules Type).

## Setting Up Sequences

Access the Condition-Based Maintenance Message Sequences form.




Condition-Based Maintenance Message Sequences form

**Sequence Number** Enter a number to specify the order of a group of records on the form.

**Customer** Enter *Y* or *N* in this field to indicate if the customer value is used as part of the criteria to search for a message recipient.

**Site** Enter *Y* or *N* in this field to indicate if the site value is used as part of the criteria to search for a message recipient.

**Business Unit** Enter *Y* or *N* in this field to indicate if the business unit value is used as part of the criteria to search for a message recipient.

**Location** Enter *Y* or *N* in this field to indicate if the location value is used as part of the criteria to search for a message recipient.

**Product Family** Enter *Y* or *N* in this field to indicate if the product family is used as part of the criteria to search for a message recipient.

**Product Model** Enter *Y* or *N* in this field to indicate if the product model value is used as part of the criteria to search for a message recipient.

**Equipment Number** Enter *Y* or *N* in this field to indicate if the equipment number value is used as part of the criteria to search for a message recipient.

**Note.** This field heading changes according to which number is primary in Equipment Constants (that is, Equipment Number, Unit Number, or Serial Number).

**Inventory Number** Enter *Y* or *N* in this field to indicate if the inventory number value is used as part of the criteria to search for a message recipient.

# Setting Up Rules for Notification and Investigation Messages

This section provides an overview of rules for notification and investigation messages and discusses how to:

- Set processing options for CBM Message Rules.

- Set up CBM Message Rules.

## Understanding Notification and Investigation Message Rules

Use the Condition-Based Maintenance Message Rules program (P1316) to define the search criteria and related message recipients for notification and investigation of alerts. The system uses information from the asset master and the alert to search through the rules and identify the message recipients.

## Forms Used to Set Up Notification and Investigation Message Rules

| Form Name | FormID | Navigation | Usage |
|---|---|---|---|
| Condition-Based Maintenance Message Rules | W1316A | Condition-Based Maintenance Setup (G13CBM41), Condition-Based Maintenance Message Rules<br><br>Click Add on the Work With Condition-Based Maintenance Message Rules form. | Set up message rules for identifying message recipients. |

## Setting Processing Options for CBM Message Rules (P1316)

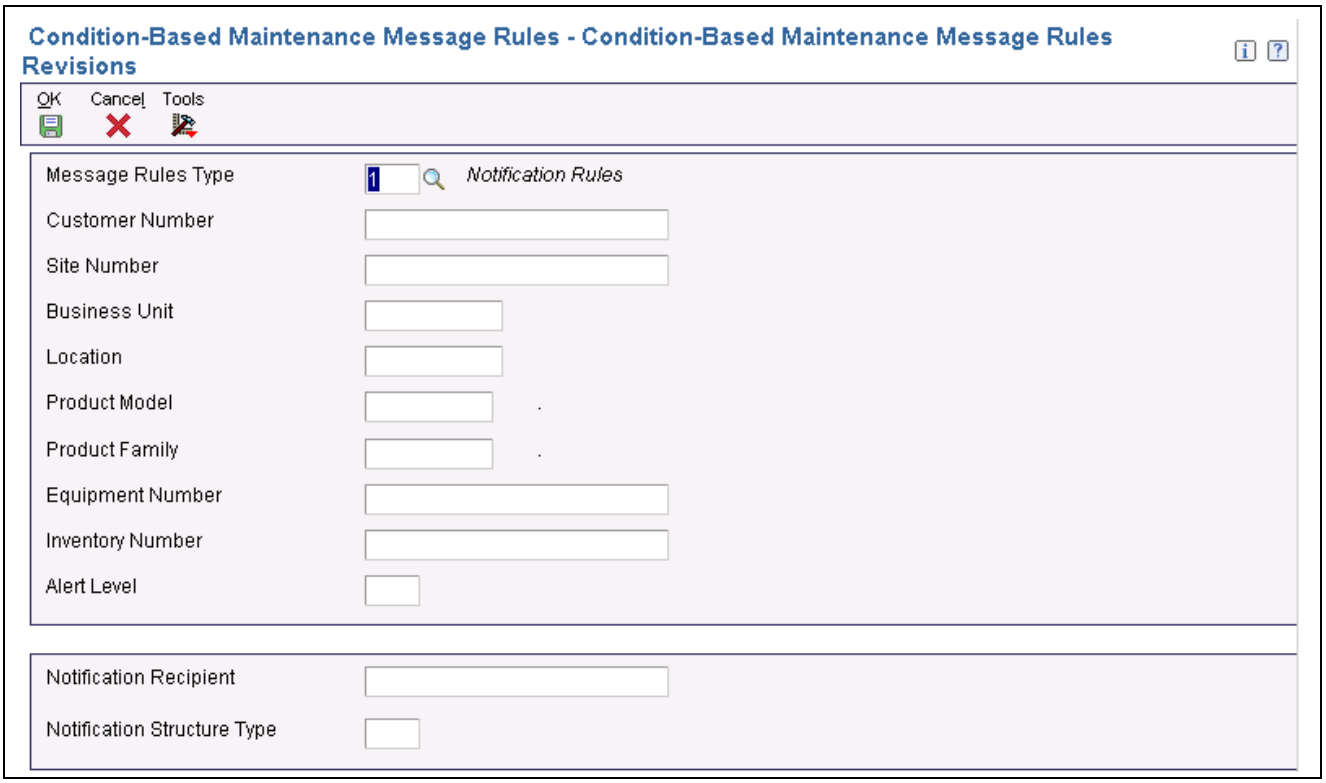
Processing options enable you to specify the default processing for programs and reports.

### Versions

**1. Equipment Search/Select (P17012S) Version** Specify the version of the Equipment Search/Select program (P17012S) that the system uses. If you leave this processing option blank, the system uses ZJDE0001.

## Setting Up CBM Message Rules

Access the Condition-Based Maintenance Message Rules form.




Condition-Based Maintenance Message Rules form

**Message Rules Type** Enter a code to indicate the message rules type. Values are listed in UDC 13/TY (Message Rules Type). The system displays either the notification or investigation fields based on the message rule type.

**Customer Number** Enter a number to identify an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

**Site Number** Enter an address book number for the lessor, renter, or lending institution.

**Business Unit** Enter an alphanumeric code to identify a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

**Location** Enter the current physical location of an asset. The location must have a valid business unit or job number in the Business Unit Master table (F0006).

**Product Model** and **Product Family** Enter a code to classify an inventory item into a model or group for customer service.

Examples include Laser Printer, InkJet, or Fax.

**Equipment Number** Enter a numeric value up to eight-digits that uniquely identifies an asset.

**Inventory Number** Enter an inventory item number. The system provides three separate item numbers plus an extensive cross-reference capability to other item numbers to accommodate substitute item numbers, replacements, bar codes, customer numbers, supplier numbers, and so forth. The item numbers are:

*Item Number (short):* An eight-digit, computer-assigned item number.

*2nd Item Number:* A 25-digit, free-form, user-defined alphanumeric item. number.

*3rd Item Number:* A 25-digit, free-form, user-defined alphanumeric item number.

**Note.** The system displays fields based on the Message Rule Type.

# Running Conversion Programs

This section provides an overview of conversion programs and discusses how to:

- Run the Update PDFG in F1207 for 8.10 program.
- Run the Update PDFG in F12071 for 8.10 program.

## Understanding Conversion Programs

Certain Capital Asset Management programs contain new fields and values. To use these programs, you must complete these two tasks, at least once, to convert the field values:

- Run the Update PDFG in F1207 for 8.10 program.
- Run the Update PDFG in F12071 for 8.10 program.

You can run the update programs multiple times with no adverse affects; but typically, you should only need to run them once.

The system previously identified preventive maintenance schedules that did not have service intervals as unscheduled maintenance.

The system now requires a value in the Schedule Type field (PDFG) in the Maintenance Schedule File table (F1207) and the Equipment PM Schedule (Model) table (F12071) to identify the type of maintenance. Therefore, you must run two new batch programs, Update PDFG in F1207 for 8.10 (R891207B) and Update PDFG in F12071 for 8.10 (R8912071B), to update the Schedule Type field for existing preventive maintenance schedules that do not have service intervals. The batch programs update the Schedule Type records in tables F1207 and F12071 with a value of *1* (unscheduled maintenance).

After you run the batch program, verify that the Schedule Type field is set to a value of *1* for all PM schedules in tables F1207 and F12071 that are not set up as condition-based (Schedule Type value of *2*) or that do not have service intervals (such as hours, miles, fuel, days, or scheduled date).

**Note.** If you use PeopleSoft EnterpriseOne Capital Asset Management (CAM) and are upgrading to a newer release, or if you have PeopleSoft EnterpriseOne fixed asset records that you want to manage through CAM, you must complete the tasks in this topic.

## Running the Update PDFG in F1207 for 8.10 Program

Select Update PDFG in F1207 for 8.10 from the Convert 8.9 to 8.11 menu (GH9619A2).

## Running the Update PDFG in F12071 for 8.10 Program

Select Update PDFG in F12071 for 8.10 from the Convert 8.9 to 8.11 menu (GH9619A2).

# CHAPTER 3

# Working with Condition-Based Alerts

This chapter provides an overview of condition-based alerts and discusses how to:

- Enter condition-based alerts.
- Respond to condition-based alerts.
- Complete condition-based alerts.

## Understanding Condition-Based Alerts

In contrast to frequency-based preventive maintenance, condition-based maintenance (CBM) uses upper and lower limits, tolerances, and other conditions that might cause an equipment or system warning or alarm to provide a system response to these conditions based on user, vendor, or manufacturer criteria.

The CBM programs provide both realtime and batch connections to respond to alerts from equipment monitoring devices. For example, a wholesale food distributor monitors refrigeration equipment within cold storage and freezer rooms. If the temperature rises above a maximum level, the system provides an alert that can generate an investigation message or create a work order to service the equipment.

Dynamic systems (electrical, hydraulic, mechanical, or thermal) possess normal signatures when operating correctly. A subtle signature change might mean the onset of a failure mode. The small differences between normal and abnormal signatures are often hidden by noise in the system. However, modern transducers and associated signal-analysis techniques can now discriminate between truly random variations and significant trends. With equipment sensors that provide operating information, increasingly available technology supports realtime, on-board monitoring of equipment.

The principles of CBM are:

- Identify changes in the condition of a machine that will indicate a potential failure.
- Identify physical characteristics that collectively indicate the current condition of a machine.
- Measure, analyze, and report data to recognize trends.

Normally, an alarm condition generates a maintenance action, such as the creation of a work order to inspect, repair, or replace the cause of the alarm. Other alarms might send a pager alert, email message, or other electronic alert to the proper technician, supervisor, or individual who needs instant notification of critical equipment status.

CBM is also useful for budgeting considerations, such as planning for costly engine maintenance only when certain conditions occur.

**Note.** Condition-based maintenance supports receiving alerts and responding to them, but does not support receiving readings and analyzing them to determine if an alert condition exists.

## Process Flow for Condition-Based Maintenance

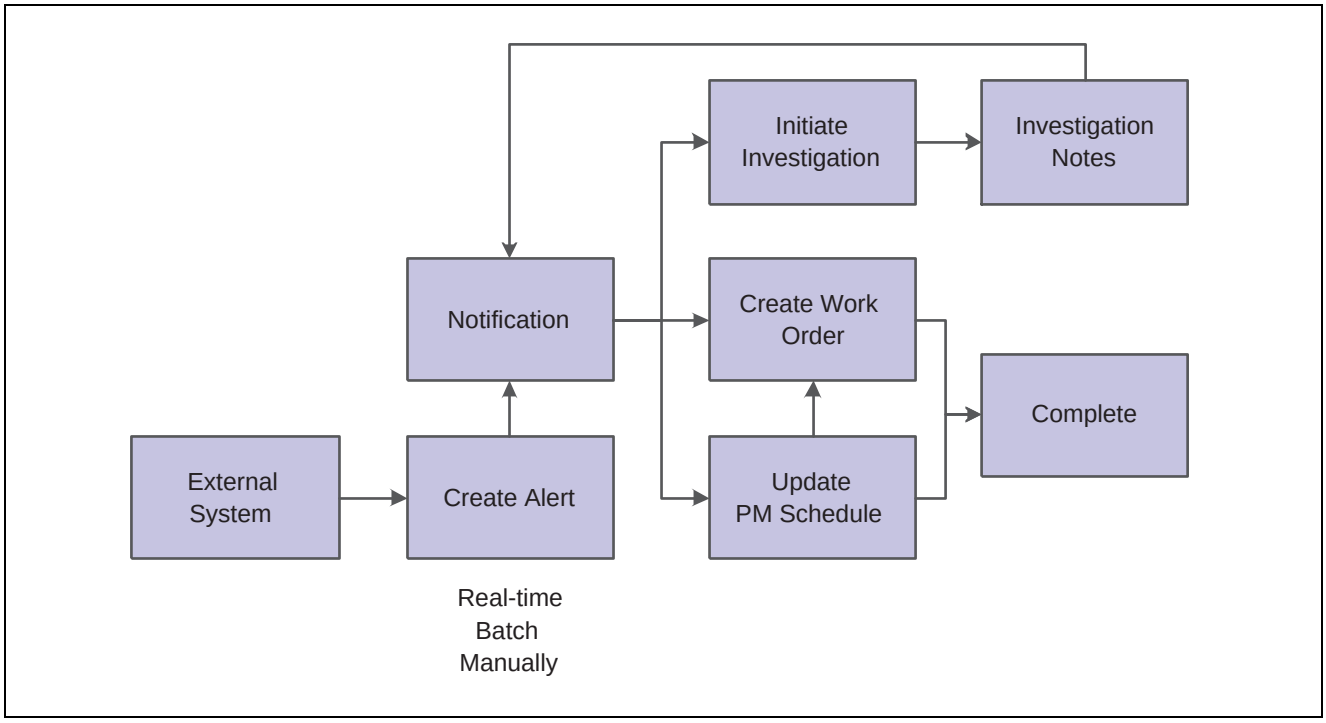
These steps provide an example of the typical flow of events and processes within Condition-Based Maintenance:

1. An external system determines if an equipment reading is at an alert status.
2. The external system sends alert details to the Condition-Based Maintenance (CBM) system.
3. The CBM system imports the alert details to the condition-based alerts table.
4. The CBM system sends a notification message to the maintenance coordinator.
5. The maintenance coordinator reviews the message about the equipment in alert.
6. The maintenance coordinator sends an investigation message to the responsible engineer.

   Alternately, the equipment alert causes the system to automatically send an investigation message to the responsible engineer.
7. The engineer reports back to the maintenance coordinator with the results of the investigation.
8. The maintenance coordinator uses the investigation results to determine whether to create a work order.
9. If necessary, the maintenance coordinator creates a work order or updates the preventive maintenance schedule to create a work order.

   Alternatively, the equipment alert causes the system to automatically create a work order to respond to the alert condition.

This flowchart illustrates the condition-based maintenance process:




Condition-based maintenance process

# Entering Condition-Based Alerts

This section provides an overview of condition-based alert entry and discusses how to:

- Set processing options for Condition-Based Alerts Workbench.
- Set processing options for Condition-Based Alerts Revisions.
- Enter condition-based alerts manually.

## Understanding Condition-Based Alert Entry

Several methods are available to enter condition-based alerts into the system. An external system can send condition-based alerts into the PeopleSoft EnterpriseOne system, or you can manually enter alerts from within PeopleSoft EnterpriseOne.

You can use these methods to enter alerts:

- Electronically enter alerts in realtime, following the XPI model.

  The system receives the alert information using the notification event. The system sends information about the successful or unsuccessful alert creation using the response event. You can manage these electronic alerts from the Condition-Based Alerts Workbench program (P1310).

- Electronically download alerts in batch.

  The system imports information from the interoperability table to the application tables and performs the same validation and business processes that occur as if you enter alerts manually. You can manage these electronic alerts from the Condition-Based Alerts Workbench program.

- Enter alerts manually using the Condition-Based Alerts Workbench program.

The Condition-Based Alerts Workbench program also enables you to perform various alert tasks, such as:

- Adding important alert information, including media objects that contain time stamps.

  You can enter text that describes the issue and actions being taken, and the system enters a time stamp (date, time, and user information) for each entry.

- Sending a notification alert message manually or automatically to those, such as technicians, supervisors, or a distribution list, who need instant notification of critical equipment status.

- Responding to the alerts.

  Alert responses are discussed separately.

## Forms Used to Enter Condition-Based Alerts Manually

| Form Name | FormID | Navigation | Usage |
|---|---|---|---|
| Condition-Based Alerts Revisions | W1311B | Daily Condition-Based Maintenance Processing (G13CBM10), Condition-Based Alerts Workbench<br><br>Click Add on Work With Condition-Based Alerts. | Enter condition-based alerts. |

# Setting Processing Options for Condition-Based Alerts Workbench (P1310)

Processing options enable you to specify the default processing for programs and reports.

## Defaults

**1. Business Unit, 2. Location, 3. Customer Number, 4. Site Number, 5. Manager, 6. Technician, 7. Alert Status, 8. Alert Level, 10. Measurement Location, 14. Company, 15. Product Family, and 16. Product Model**

Specify the business unit or job, location, customer number, site number, manager number, technician number, alert status, alter level, measurement status, equipment status, company, product family, or product model that the system uses to search for condition-based alerts.

**9. Automated Response Type**

Specify the automated response type that the system uses to search for condition-based alerts. Values are listed in user-defined code (UDC) 13/AR (Automated Response Type).

**11. Event Date From** and **12. Event Date Thru**

Specify the beginning event date or the ending event date in a range of event dates. The system uses this date when searching for condition-based alerts.

**17. Notification Workflow Process** and **18. Investigation Workflow Process**

Specify the condition-based alerts workflow process that is used for notification or investigation. The system uses these values when displaying the notification message information or the investigation message information from workflow. If you leave this processing option blank, the system uses the CBMNOTIFY workflow process.

---

**Note.** If you leave the Investigation Workflow processing option blank, the system uses the CBMINVEST workflow process.

---

## Categories

**1. Major Accounting Class**

Specify the category code that classifies assets into accounting classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C1 (Major Accounting Class).

**2. Major Equipment Class**

Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C2 (Major Equipment Class).

**3. Manufacturer**

Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C3 (Manufacturer).

**4. Model Year**

Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C4 (Model Year).

**5. Usage Miles or Hours**

Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C5 (Usage Miles or Hours).

**6. Category Code - F/A 6** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C6 (Equipment Code).

**7. Category Code - F/A 7** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C7 (Category Code 7).

**8. Category Code - F/A 8** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C8 (Division).

**9. Category Code - F/A 9** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C9 (Category Code 9).

**10. Category Code - F/A 10 (Rate Group)** Specify the category code that groups similar items for billing. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/C0 (Rate Group).

**11. Category Code - F/A 11** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F1 (Category Code 11).

**12. Category Code - F/A 12** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F2 (Category Code 12).

**13. Category Code - F/A 13** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F3 (Category Code 13).

**14. Category Code - F/A 14** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F4 (Category Code 14).

**15. Category Code - F/A 15** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F5 (Category Code 15).

**16. Category Code - F/A 16** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F6 (Category Code 16).

**17. Category Code - F/A 17** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F7 (Category Code 17).

**18. Category Code - F/A 18** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F8 (Category Code 18).

**19. Category Code - F/A 19** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F9 (Category Code 19).

**20. Category Code - F/A 20** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/F0 (Category Code 20).

**21. Category Code - F/A 21** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/21 (Category Code 21).

**22. Category Code - F/A 22** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/22 (Category Code 22).

**23. Category Code - F/A 23** Specify the category code that classifies assets into groups or classes. The system uses this code when searching for condition-based alerts. Enter a value from UDC 12/23 (Category Code 23).

### Versions

**1. Condition-Based Alerts Revisions (P1311) Version** Specify the version of the Condition-Based Alerts Revisions program (P1311). If you leave this processing option blank, the system uses ZJDE0001.

**2. Work with Failure Analysis (P17766) Version** Specify the version of the Work with Failure Analysis program (P17766). If you leave this processing option blank, the system uses ZJDE0001.

**3. Work Order Revisions (P17714) Version** Specify the version of the Work Order Revisions program (P17714). If you leave this processing option blank, the system uses ZJDE0003.

**4. PM Backlog (P12071) Version** Specify the version of the Preventive Maintenance Backlog program (P12071). If you leave this processing option blank, the system uses ZJDE0001.

**5. Equipment Search/Select (P17012S) Version** Specify the version of the Equipment Search/Select program (P17012S). If you leave this processing option blank, the system uses ZJDE0001.

## Setting Processing Options for Condition-Based Alerts Revisions (P1311)

Processing options enable you to specify the default processing for programs and reports.

### Defaults

**1. Send Notification Message** Specify a default value for the Send Notification Message field when adding a condition-based alert record.

Blank: Do not send.

*1* or *Y:* Send.

**2. Automated Response Type** Specify a default value for the Automated Response Type field when you add a condition-based alert record. Enter a value from UDC 13/AR (Automated Response Type). If you leave this processing option blank, the system uses No Automated Response.

**3. Notification Workflow Process** and **4. Investigation Workflow Process** Specify the condition-based alerts workflow process that the system uses for notification or investigation. The system uses these values when displaying the notification message information or the investigation message information from workflow. If you leave this processing option blank, the system uses the CBMNOTIFY workflow process.

**Note.** If you leave the Investigation Workflow processing option blank, the system uses the CBMINVEST workflow process.

### Process

**1. Condition-Based Alerts Processor (R1312) Version**

Specify the version of the Condition-Based Alerts Processor program (R1312) that the system uses when processing the manual responses of condition-based alerts.

*1:* Condition-Based Alerts Processor (R1312) Version.

Blank: XJDE0001.

### Versions

**1. Condition-Based Alerts Processor (R1312) Version**

Specify the version of the Condition-Based Alerts Processor program (R1312) that the system uses when processing the automated responses of condition-based alerts. If you leave this processing option blank, the system does not process the automated responses of condition-based alerts.

**Note.** If you leave this processing option blank, you must run a version of the Condition-Based Alerts Processor program (R1312) to be able to complete the automated response-type processing.

**2. Work with Failure Analysis (P17766) Version**

Specify the version that the system uses for the Work with Failure Analysis program (P17766). If you leave this processing option blank, the system uses ZJDE0001.

**3. Work Order Revisions (P17714) Version**

Specify the version that the system uses for the Work Order Revisions program (P17714). If you leave this processing option blank, the system uses ZJDE0003.

**4. PM Backlog (P12071) Version**

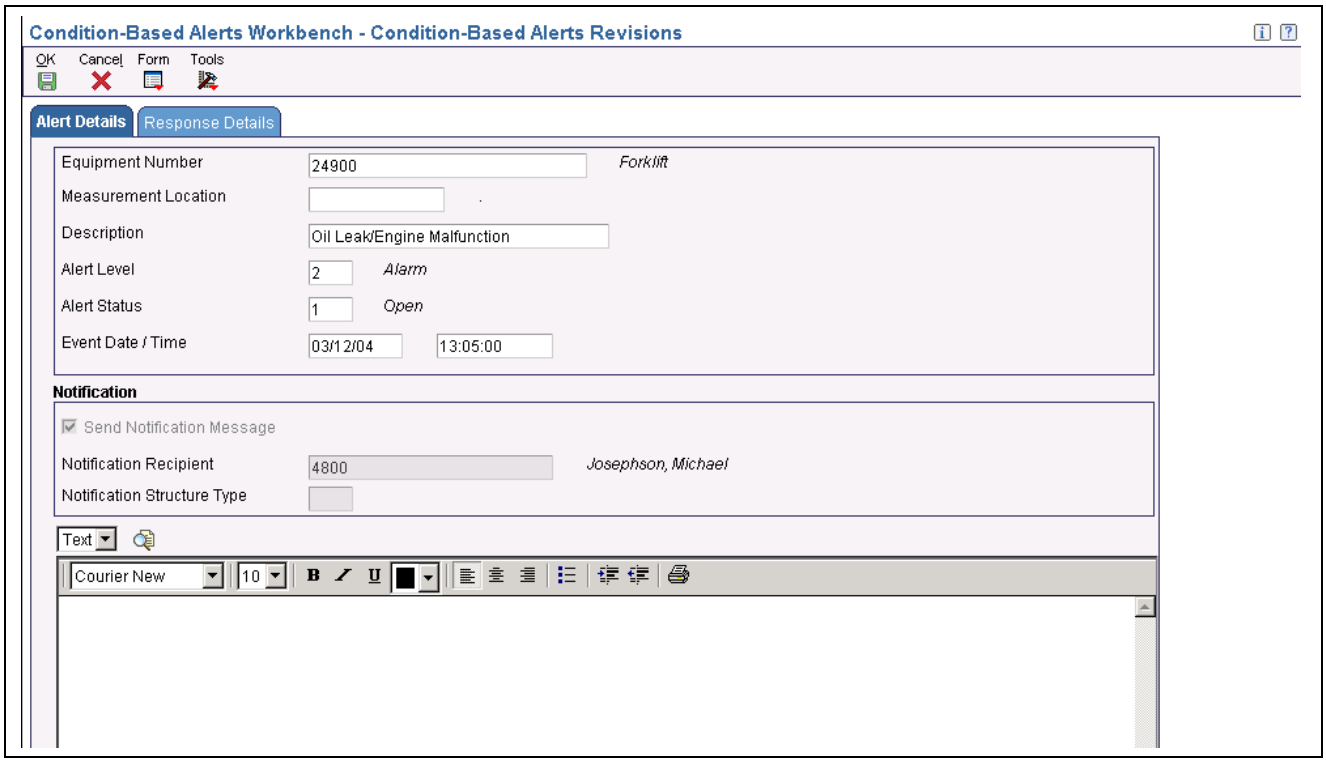
Specify the version of the Preventive Maintenance Backlog program (P12071) that the system uses. If you leave this processing option blank, the system uses ZJDE0001.

**5. Equipment Search/Select (P17012S) Version**

Specify the version of the Equipment Search/Select program (P17012S). If you leave this processing option blank, the system uses ZJDE0001.

## Entering Condition-Based Alerts Manually

Access the Condition-Based Alerts Revisions form.




Condition-Based Alerts Revisions form

**Equipment Number** Enter an identification code to represent an asset. You enter the identification code in one of these formats:

*1:* Asset number (a computer-assigned, eight-digit, numeric control number).

*2:* Unit number (a 12-character alphanumeric field).

*3:* Serial number (a 25-character alphanumeric field).

Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character that you enter indicates whether you are entering the primary (default) format that is defined for the system, or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats on the fixed assets system constants form.

**Measurement Location** Enter a code to indicate a measurement location on a piece of equipment. You can use this code to indicate where a measurement is taken or where an alert originates on a piece of equipment. Enter a value from UDC 13/LC (Measurement Location).

**Event Date / Time** Enter the date on which an event occurred, such as the date of a test reading or the date of a condition-based alarm.

**Send Notification Message** Enter a code to specify whether a notification message is sent when a condition-based alert is entered into the system. Values are:

*1* or *Y:* Send.

*0* or *N:* Do not send.

# Responding to Condition-Based Alerts

This section provides an overview of responses to condition-based alerts and discusses how to:

- Respond by initiating an investigation request.
- Respond by creating a work order.
- Respond by updating the preventive maintenance schedule.
- Process condition-based alerts.
- Set processing options for Condition-Based Alerts Processor.
- Review condition-based alerts.

## Understanding Responses to Condition-Based Alerts

When the system receives an equipment alert, you can send an investigation message to one person (such as a plant engineer or supervisor) or to a distribution list to begin the investigation process. Then, you can generate a work order or update the preventive maintenance schedule, based on the setup parameters for condition-based maintenance. You can respond to alerts manually by using the Condition-Based Alerts Workbench program (P1310) or automatically by using the Condition-Based Alerts Processor (R1312).

These responses are available for condition-based alerts:

- Initiate an investigation request.

  The system sends a boilerplate message through workflow. The investigation message appears in the employee Work Center or in an email, requires a response for completing the investigation, and notifies the originator for follow-up action.

- Create a work order to inspect, repair, or replace the cause of the alert.

  The system uses information from the model work order, maintenance rules, and processing options of the Condition-Based Alerts Processor (R1312) to create the new work order.

- Update the preventive maintenance schedule.

  The system updates the alert level from the condition-based alert to a PM schedule that is set up as condition-based. You then use the preventive maintenance system to inspect, repair, or replace the cause of the alert.

To process condition-based alerts according to their automated response type values, you must run the Condition-Based Alerts Processor program (R1312). For example, if the automated response type on an alert contains a value of *3* (Create W.O. from Model), this program creates a work order.

The R1312 program supports this functionality:

- Create investigation message.
- Create work order from model.
- Update the Maintenance Schedule File table (F1207).
- Run the Update PM Schedule Status program (R12807).

The report includes the equipment number, description, alert level, automated response type, and results (such as to whom an investigation message was sent or the work order number that was created).

**Note.** Program R1312 does not affect condition-based alerts that have an automated response type value of *1* (No Automated Response).

Use the Condition-Based Alerts Workbench program (P1310) to review condition-based alert messages. From the workbench, you can access the Process Audit Trail (P98860, Process Task Monitor), which displays the recipients of notification or investigation messages and the detail and status of workflow activities.

### See Also

Chapter 3, "Working with Condition-Based Alerts," Processing Condition-Based Alerts, page 24

*PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Foundation*

## Forms Used to Respond to Condition-Based Maintenance Alerts

| Form Name | FormID | Navigation | Usage |
|---|---|---|---|
| Condition-Based Alerts Revisions | W1311B | Daily Condition-Based Maintenance Processing (G13CBM10), Condition-Based Alerts Workbench.<br>Locate the applicable alert on the Work With Condition-Based Alerts form.<br>Select Alert Revisions from the Row menu. | Enter response to condition-based alert. |
| Create Investigation Message | W1311A | Select Manual Responses on Condition-Based Alert Revisions Form menu and then select Investigation Msg. | Enter an investigation message in response to an alert. |
| Create W.O. from Model | W1311E | Select Manual Responses on Condition-Based Alert Revisions Form menu, and then select Create W.O. | Enter a work order based on a model work order in response to an alert. |
| Update P.M. Schedule | W1311F | Select Manual Responses on Condition-Based Alert Revisions Form menu, and then select Update P.M. | Enter a preventive maintenance schedule in response to an alert. |
| Process Audit Trail | W98860A | Locate and select the applicable alert message on the Work With Condition-Based Alerts form..<br>Select Message Review from the Row menu, and then select Notification or Investigation. | Review the audit trail for messages and responses. |

# Responding by Initiating an Investigation Message

Access the Create Investigation Message form.

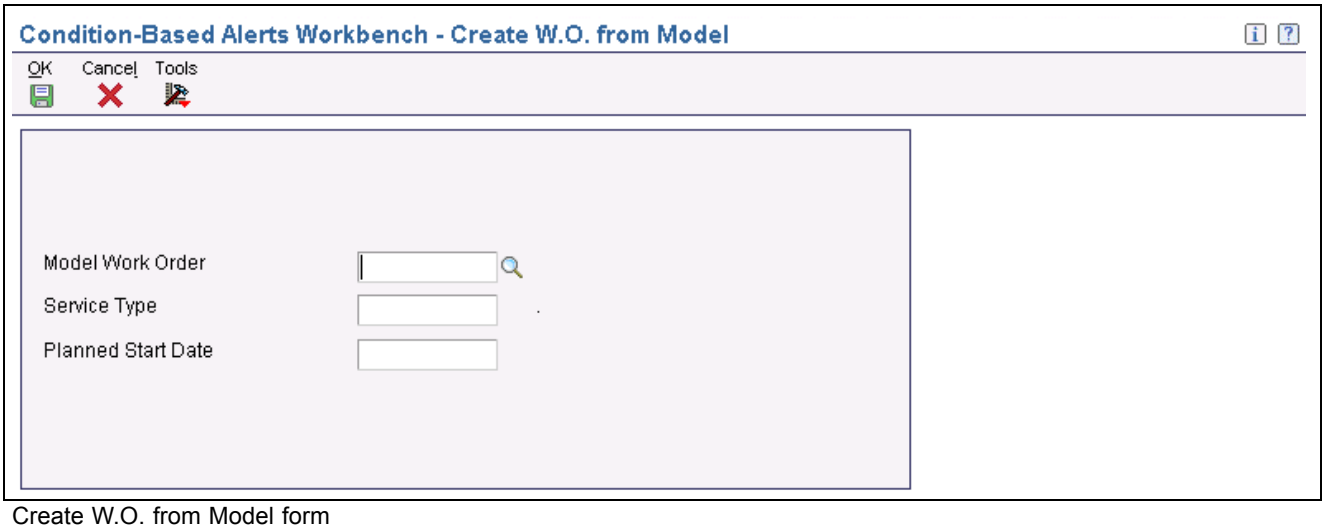

Create Investigation Message form

**Investigation Structure Type**

**Note.** When raising an investigation, a notification recipient is required. This is the address book number that will receive the email response from the investigator once completed. If a notification email is not sent, the system will use the notification rules.

# Responding by Creating a Work Order

Access the Create W.O. from Model form.




Create W.O. from Model form

**Model Work Order** Enter a number to indicate the model work order. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on.

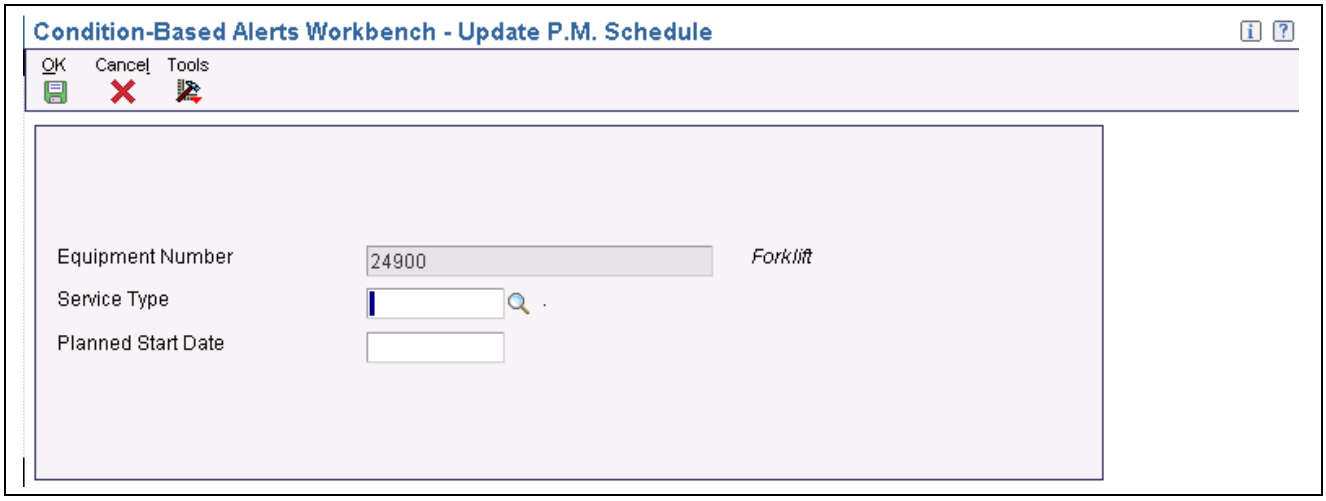
**Service Type** Enter a code to indicate the condition-based maintenance service to be performed. Values are in UDC 12/ST (Service Types). Examples of codes include TIRES for replace tires and ENGINE for engine overhaul.

The system uses this code, in conjunction with the equipment number, to obtain the default rules from the Maintenance Schedule File (F1207) table when creating a work order.

**Planned Start Date** Enter the date when the item or line of work is to start.

## Responding by Updating the Preventive Maintenance Schedule

Access the Update P.M. Schedule form.




Update P.M. Schedule form

**Service Type** Enter a code to indicate the condition-based maintenance service to be performed. Values are in UDC 12/ST (Service Types). Examples of codes include TIRES for replace tires and ENGINE for engine overhaul.

The system uses this code, in conjunction with the equipment number, to update the Maintenance Schedule File (F1207) table with the alert level from the condition-based alert. You can then use the M Update Status program (R12807) to create a work order.

## Processing Condition-Based Alerts

Select Condition-Based Alerts Processor from the Daily Condition-Based Maintenance Processing menu (G13CBM10).

## Setting Processing Options for Condition-Based Alerts Processor (R1312)

Processing options enable you to specify the default processing for programs and reports.

### Process

**1. Work Center Or Report** Specify where the system writes errors. Values are:

Blank: Write errors to the Work Center.

*1:* Write errors on the report.

**2. Job Status Message Recipient**

Specify the address book number of the recipient of job status messages that result from the Condition-Based Alerts Processor program (R1312). If you leave this processing option blank, the system uses the address book number of the current user.

**3. Update PM Schedule (R12807) Version**

Specify which version of the Update PM Schedule Status program (R12807) the system uses to process PM schedules that have been updated as a result of a condition-based alert. If you leave this processing option blank, the system does not process PM schedules.

**4. Work Order Cross Reference**

Specify the value for the work order cross-reference. Values are:

Blank: Equipment's immediate parent.

*1:* Equipment's top-level parent.

*2:* Value from the model work order.

**5. Create Individual Resource Assignments**

Specify whether the system automatically creates individual resource assignments that are based on the Assigned To (ANP) address book number on the new work order. The system verifies that the address book number appears in the Resource Master table (F48310). This processing option applies only when the condition-based alerts process creates a work order. Values are:

Blank: Do not create.

*1*: Create.

**6. Work Order Parts Detail (P17730) Version**

Specify the version that the system uses for the Work Order Parts Detail program (P17730). If you leave this processing option blank, the system uses ZJDE0002. This processing applies when parts detail is attached to the new work order.

**7. Work Order Labor Detail (P17732) Version**

Specify the version that the system uses for the Work Order Labor Detail program (P17732). If you leave this processing option blank, the system uses ZJDE0002. This processing option applies when labor detail is attached to the new work order.

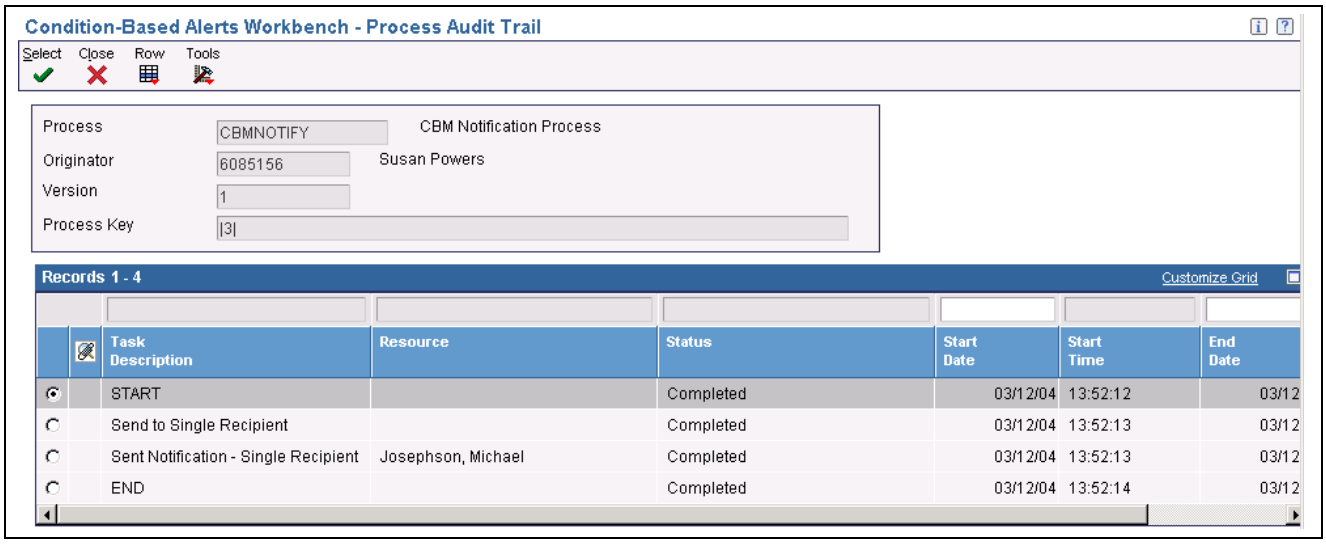
### Versions

**1. Condition-Based Alerts Revisions (P1311) Version**

Specify the version that the system uses for the link to the Condition-Based Alerts Revisions program (P1311) that is provided in the investigation message. If you leave this processing option blank, the system uses ZJDE0001.

## Reviewing Condition-Based Alerts

Access the Process Audit Trail form.



Process Audit Trail form

# Completing Condition-Based Alerts

This section provides an overview of condition-based alerts completion. and discusses how to complete alerts.

## Understanding Condition-Based Alerts Completion

After you have responded to a condition-based alert, you can change the alert status to a complete or closed status when the work is completed. You can complete the alerts using:

- Work order activity rules.

  If you are using work orders, you can use the work order activity rules to complete or close the condition-based alert according to the work order status.

- PM Backlog.

  To complete alerts through the PM backlog, you must set the processing options for completion or cancellation and update the PM status.

- Condition-Based Alerts Workbench.

  You can complete alerts manually by changing the Alert Status to a complete or closed status.

### See Also

*PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook*, "Setting Up Work Orders"

*PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook*, "Working with Preventive Maintenance Schedules," Changing the Status of PMs to Complete

# Forms Used to Complete Condition-Based Alerts

| Form Name | FormID | Navigation | Usage |
|---|---|---|---|
| Work Order Revisions | W17714A | Work Order (G1316), Work Order Entry<br>Locate and select a work order, and then click Selecton the Work With Work Orders form.<br>Change the work order status on the Planning tab of the Work Order Revisions form. | Complete a work order, which then completes the condition-based alert through work order activity rules. |
| PM Backlog | W12071A | Daily Condition-Based Maintenance Processing (G13CBM10), PM Backlog | Complete a condition-based alert and change status of PM to *Complete*. |
| Work With Condition-Based Alerts | W1310A | Daily Condition-Based Maintenance Processing (G13CBM10), Condition-Based Alerts Workbench<br>Enter a closed status in the Alert Status field on the Alerts tab. | Complete a condition-based alert. |

# APPENDIX A

# Delivered Workflow for PeopleSoft EnterpriseOne Condition-Based Maintenance

This appendix discusses the delivered workflow for Condition-Based Maintenance (CBM).

### See Also

*PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Workflow Tools*

## Delivered Workflow for CBM

This section discusses the CBM workflow.

### Condition-Based Maintenance Notification Process

This section discusses the Condition-Based Maintenance Notification Process workflow.

#### Description

| | |
|---|---|
| **Workflow Description** | The system sends a workflow notification message to a responsible person or persons within the maintenance team when the system receives a condition-based alert. |
| **Workflow Trigger** | The system receives a CBM Alert that is flagged to create a notification message. |
| **Workflow Action** | The responsible person or persons within the maintenance team receive a notification message indicating that a condition-based alert has been received by the system. |

#### Workflow Objects

| | |
|---|---|
| **System** | 13 |
| **Workflow Object Name** | CBMNOTIFY |
| **Object ID** | N1301040 |
| **Event Descriptions / Function Name** | CallCBMNotificationWorkflow |
| **Sequence / Line Numbers** | 11, 11 |

# Condition-Based Maintenance Investigation Process

This section discusses the Condition-Based Maintenance Investigation Process workflow.

## Description

| | |
|---|---|
| **Workflow Description** | The system can send a workflow investigation request message to a responsible person or persons within the maintenance team to investigate the condition-based alert that the system receives. When the investigation is complete, the system sends an investigation completed message to the original notification recipient. |
| **Workflow Trigger** | The system receives a CBM Alert that is flagged with an automated response type of *2* to create an investigation request message. You can also manually trigger an investigation request message from the Condition-Based Alerts Workbench (P1310). |
| **Workflow Action** | The responsible person or persons within the maintenance team receive an investigation message requesting they investigate the condition-based alert that was received in the system. The message provides a link to the Condition-Based Alerts Investigation Revisions form. On this form, the recipient can record investigation notes and indicate whether or not the investigation is complete. When the investigation is complete, the system sends another message to the original notification recipient. |

## Workflow Objects

| | |
|---|---|
| **System** | 13 |
| **Workflow Object Name** | CBMINVEST |
| **Object ID** | N1301070 |
| **Event Descriptions / Function Name** | CallCBMInvestigationWorkflow |
| **Sequence / Line Number** | 11 |

# Glossary of PeopleSoft Terms

**activity** A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.

**activity rule** The criteria by which an object progresses from one given point to the next in a flow.

**add mode** A condition of a form that enables users to input data.

**Advanced Planning Agent (APAg)** A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.

**application server** A server in a local area network that contains applications shared by network clients.

**as if processing** A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.

**alternate currency** A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.

In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.

**as of processing** A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.

**back-to-back process** A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.

**batch processing** A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.

In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.

**batch server** A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.

**batch-of-one immediate** A transaction method that enables a client application to perform work on a client workstation, 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 and store-and-forward.

**business function** A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable 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** | See named event rule (NER). |
| **business view** | A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data. |
| **central objects merge** | A process that blends a customer's modifications to the objects in a current release with objects in a new release. |
| **central server** | A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server. |
| **charts** | Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software. |
| **connector** | Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors. |
| **contra/clearing account** | A general ledger account in PeopleSoft EnterpriseOne Financial Management that is 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 in PeopleSoft EnterpriseOne General Accounting. |
| **Control Table Workbench** | An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables. |
| **control tables merge** | A process that blends a customer's modifications to the control tables with the data that accompanies a new release. |
| **cost assignment** | The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects. |
| **cost component** | In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead). |
| **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. |
| **currency restatement** | The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting. |
| **database server** | A server in a local area network that maintains a database and performs searches for client computers. |
| **Data Source Workbench** | An application that, during the Installation Workbench process, copies all 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. |

**date pattern** A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.

**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 information** Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).

**direct connect** A transaction method in which a client application communicates interactively and directly with a server application.

See also batch-of-one immediate and store-and-forward.

**Do Not Translate (DNT)** A type of data source that must exist on the iSeries because of BLOB restrictions.

**dual pricing** The process of providing prices for goods and services in two currencies.

**edit code** A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.

**edit mode** A condition of a form that enables users to change data.

**edit rule** A method used for formatting and validating user entries against a predefined rule or set of rules.

**Electronic Data Interchange (EDI)** An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.

**embedded event rule** An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.

**Employee Work Center** A central location for sending and receiving all PeopleSoft 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.

**enterprise server** A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.

**EnterpriseOne object** A reusable 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.

**EnterpriseOne process** A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.

**Environment Workbench** An application that, during the Installation Workbench process, 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.

**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.

**event rule** A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.

**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. A facility is sometimes referred to as a *business unit* .

**fast path** A command prompt that enables the user to move quickly among menus and applications by using specific commands.

**file server** A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files.

**final mode** The report processing mode of a processing mode of a program that updates or creates data records.

**FTP server** A server that responds to requests for files via file transfer protocol.

**header information** 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.

**interface table** See Z table.

**integration server** A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.

**integrity test** A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.

**interoperability model** A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.

**in-your-face-error** In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.

**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.

**jargon** An alternative data dictionary item description that PeopleSoft EnterpriseOne or People 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. This server provides middleware services for security and state maintenance, along with data access and persistence.

**JDBNET** A database driver that enables heterogeneous servers to access each other's data.

**JDEBASE Database Middleware** A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.

**JDECallObject** An API used by business functions to invoke other business functions.

**jde.ini** A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.

**JDEIPC** Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

**jde.log** The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne.

**JDENET** PeopleSoft proprietary communications middleware package. This package 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 PeopleSoft EnterpriseOne supported platforms.

**Location Workbench** An application that, during the Installation Workbench process, 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.

**logic server** A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs.

**MailMerge Workbench** An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.

**master business function (MBF)** An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.

**master table** See published table.

**matching document** A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.

**media storage object** Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.

**message center** A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.

**messaging adapter** An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.

**messaging server** A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.

**named event rule (NER)** Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.

***nota fiscal*** In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.

***nota fiscal factura*** In Brazil, a nota fiscal with invoice information.

See also *nota fiscal.*

**Object Configuration Manager (OCM)** In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.

**Object Librarian** A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.

**Object Librarian merge** A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.

**Open Data Access (ODA)** An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.

**Output Stream Access (OSA)** An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

**package** 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 on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server.

**package build** A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.

Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”

**package location** The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.

**Package Workbench** An application that, during the Installation Workbench process, 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.

**PeopleSoft Database** See JDEBASE Database Middleware.

**planning family** A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.

**preference profile** The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.

**print server** The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.

**pristine environment** A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

**processing option** A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.

**production environment** A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.

**production-grade file server** A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

**program temporary fix (PTF)** A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.

**project** In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

**promotion path** The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.

**proxy server** A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.

**published table** Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

**publisher** The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

**pull replication** One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne 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 F98DRPCN table.

**QBE** An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

**real-time event** A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.

**refresh** A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.

**replication server** A server that is responsible for replicating central objects to client machines.

**quote order** In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

| | |
|---|---|
| | In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order. |
| **selection** | Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter. |
| **Server Workbench** | An application that, during the Installation Workbench process, 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. |
| **spot rate** | An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies. |
| **Specification merge** | A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release. |
| **specification** | A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications. |
| **Specification Table Merge Workbench** | An application that, during the Installation Workbench process, runs the batch applications that update the specification tables. |
| **store-and-forward** | The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions. |
| **subscriber table** | Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table. |
| **supplemental data** | Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.<br><br>For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpriseOne systems. |
| **table access management (TAM)** | The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-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** | An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables. |
| **table conversion** | An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables. |
| **table event rules** | Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level. |
| **terminal server** | A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer. |

**three-tier processing** The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.

**three-way voucher match** In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.

**transaction processing (TP) 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 may include programs that validate data and format terminal screens.

**transaction set** An electronic business transaction (electronic data interchange standard document) made up of segments.

**trigger** One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.

**triggering event** A specific workflow event that requires special action or has defined consequences or resulting actions.

**two-way voucher match** In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.

**User Overrides merge** Adds new user override records into a customer's user override table.

**variance** In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (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 using the current bill of material, routing, and overhead rates.

**Version 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.

**visual assist** Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.

**vocabulary override** An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.

**wchar_t** An internal type of a wide character. It is used for writing portable programs for international markets.

**web application server** A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.

**web server** A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.

**Windows terminal server** A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

**workbench** A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of PeopleSoft EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.

**work day calendar** In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.

**workflow** The automation of a business process, in whole or in 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 server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.

**XAPI events** A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.

**XML CallObject** An interoperability capability that enables you to call business functions.

**XML Dispatch** An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.

**XML List** An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.

**XML Service** An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.

**XML Transaction** An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.

**XML Transaction Service (XTS)** Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.

**Z event** A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.

**Z table** A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Z tables also can be used to retrieve PeopleSoft EnterpriseOne data. Z tables are also known as interface tables.

**Z transaction** Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.

# Index

## R



## S



## T



## U



## V



## W