JD Edwards EnterpriseOne Applications

Customer Relationship Management for Support Implementation Guide

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Preface

Welcome to the JD Edwards EnterpriseOne Applications Customer Relationship Management Support Applications Implementation Guide.

Audience

This guide is intended for implementers and end users of the JD Edwards EnterpriseOne Customer Relationship Management Support Applications system.

JD Edwards EnterpriseOne Products

This implementation guide refers to these JD Edwards EnterpriseOne products from Oracle:

- JD Edwards EnterpriseOne Advanced Pricing

- JD Edwards EnterpriseOne Service Management

- JD Edwards EnterpriseOne Foundation - Address Book

- JD Edwards EnterpriseOne General Ledger

JD Edwards EnterpriseOne Application Fundamentals

Additional essential information describing the setup and design of the system appears in a companion volume of documentation called *JD Edwards EnterpriseOne Customer Relationship Management Application Fundamentals 9.0 Implementation Guide*.

Customers must conform to the supported platforms for the release as detailed in the JD Edwards EnterpriseOne minimum technical requirements. In addition, JD Edwards EnterpriseOne may integrate, interface, or work in conjunction with other Oracle products. Refer to the cross-reference material in the Program Documentation at http://oracle.com/contracts/index.html for Program prerequisites and version cross-reference documents to assure compatibility of various Oracle products.

> **See Also:**
>
> - *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

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Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1308615.1, or by using this link:

https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1308615.1

To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Indicates field values.
Italics	Indicates emphasis and JD Edwards EnterpriseOne or other book-length publication titles.
Monospace	Indicates a JD Edwards EnterpriseOne program, other code example, or URL.

1

Introduction to JD Edwards EnterpriseOne Customer Relationship Management (CRM) Support Applications

This chapter contains the following topics:

1.1 JD Edwards EnterpriseOne CRM Support Applications Overview

The JD Edwards EnterpriseOne CRM Support Applications provide a company with a central point-of-contact to capture and manage service processes. JD Edwards EnterpriseOne CRM Support Applications include these products:

- JD Edwards EnterpriseOne Case Management
- JD Edwards EnterpriseOne Solution Advisor
- JD Edwards EnterpriseOne Branch Scripting

Use the JD Edwards EnterpriseOne Case Management system from Oracle to capture customer issues, track issues from creation to resolution, and set up rules to automatically assign cases to the appropriate people. The JD Edwards EnterpriseOne Case Management system enables companies to determine if and how they escalate cases. You can determine to escalate cases using the notification method and set up provider group distribution lists to send assignment and escalation notification to all provider group members when cases are assigned to the provider group. You can determine to escalate cases using skill levels and set up provider groups and assign skill levels to group members to systematically escalate cases to the next highest level provider group member during the escalation routine.

Through the JD Edwards EnterpriseOne Case Management system, you can assign tasks and activities to cases, associate objects such as service work orders, equipment work orders, sales orders, quotes, leads, scripts and returned material authorization (RMA) to cases, and review and assign solutions to cases.

If you are using JD Edwards EnterpriseOne Customer Self Service, you can set up the system to enable customers to enter and review their case information.

JD Edwards EnterpriseOne Solution Advisor is a knowledge base application that assembles and classifies customer-specific information. Use the JD Edwards EnterpriseOne Solution Advisor application to store and organize case and service work order resolutions. This information is accessible by customers (if you are using JD Edwards EnterpriseOne Customer Self Service) and support agents to assist them in finding resolutions for cases and service work orders.

See *JD Edwards EnterpriseOne Applications Customer Self Service Implementation Guide*.

If you are not using JD Edwards EnterpriseOne Solution Advisor, you can set up and use the failure analysis module, a database that enables you to associate failures, analyses, and resolutions with cases and service work orders.

See "Working with Failure Analysis' in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*.

Use the JD Edwards EnterpriseOne Branch Scripting application to define and set up question structures to assist you with gathering information to help you find case and service work order resolutions.

1.2 JD Edwards EnterpriseOne CRM Support Applications Integrations

The JD Edwards EnterpriseOne CRM Support Applications system integrates with these JD Edwards EnterpriseOne systems from Oracle:

- JD Edwards EnterpriseOne General Accounting
- JD Edwards EnterpriseOne Accounts Receivable
- JD Edwards EnterpriseOne Address Book
- JD Edwards EnterpriseOne Advanced Pricing
- JD Edwards EnterpriseOne Sales Order Management
- JD Edwards EnterpriseOne Service Management
- JD Edwards EnterpriseOne Capital Asset Management
- JD Edwards EnterpriseOne Inventory Management

We discuss integration considerations in the implementation chapters in this implementation guide.

1.2.1 JD Edwards EnterpriseOne General Accounting

If you work in a multicurrency environment, you can access the JD Edwards EnterpriseOne General Accounting system from Oracle to review and edit currency information as necessary.

1.2.2 JD Edwards EnterpriseOne Accounts Receivable

The JD Edwards EnterpriseOne Accounts Receivable system from Oracle records the information used by JD Edwards EnterpriseOne Service Management to manage invoicing for case billing.

1.2.3 JD Edwards EnterpriseOne Address Book

All customers and service providers, including provider groups, technicians, provider group members, and call center agents, are set up in the JD Edwards EnterpriseOne Address Book system from Oracle. When activities are attached to cases, the assignee's calendar, located in the JD Edwards EnterpriseOne Address Book system, is updated with the activity information.

1.2.4 JD Edwards EnterpriseOne Advanced Pricing

You can define advanced pricing adjustments and adjustment schedules and attach them to cases to determine case billing.

1.2.5 JD Edwards EnterpriseOne Sales Order Management

Through the Case Related Actions program (P90CG503), you can associate quotes, sales orders, leads, and RMA to cases.

1.2.6 JD Edwards EnterpriseOne Service Management

When you enter a case, the system calculates commitments according to the service contract, if one exists. To help you resolve a case, you can issue a service work order and associate it to the case. When searching for solutions, you can search for service work orders. The JD Edwards EnterpriseOne Service Management system from Oracle manages invoicing for case billing.

1.2.7 JD Edwards EnterpriseOne Capital Asset Management

To help you resolve a case, you can issue an equipment work order and associate it to the case. When searching for solutions, you can search for equipment work orders

1.2.8 JD Edwards EnterpriseOne Inventory Management

If you are billing for cases, you set up distribution automatic accounting instructions (AAIs) to direct how case transactions are applied to accounts. You can associate solutions to items using the Frequently Used Solutions form in Solution Advisor.

1.3 JD Edwards EnterpriseOne CRM Support Applications Business Processes

This process flow illustrates the Request to Resolve business process, which is supported by JD Edwards EnterpriseOne CRM Support applications:

Figure 1–1   Request to resolve business process
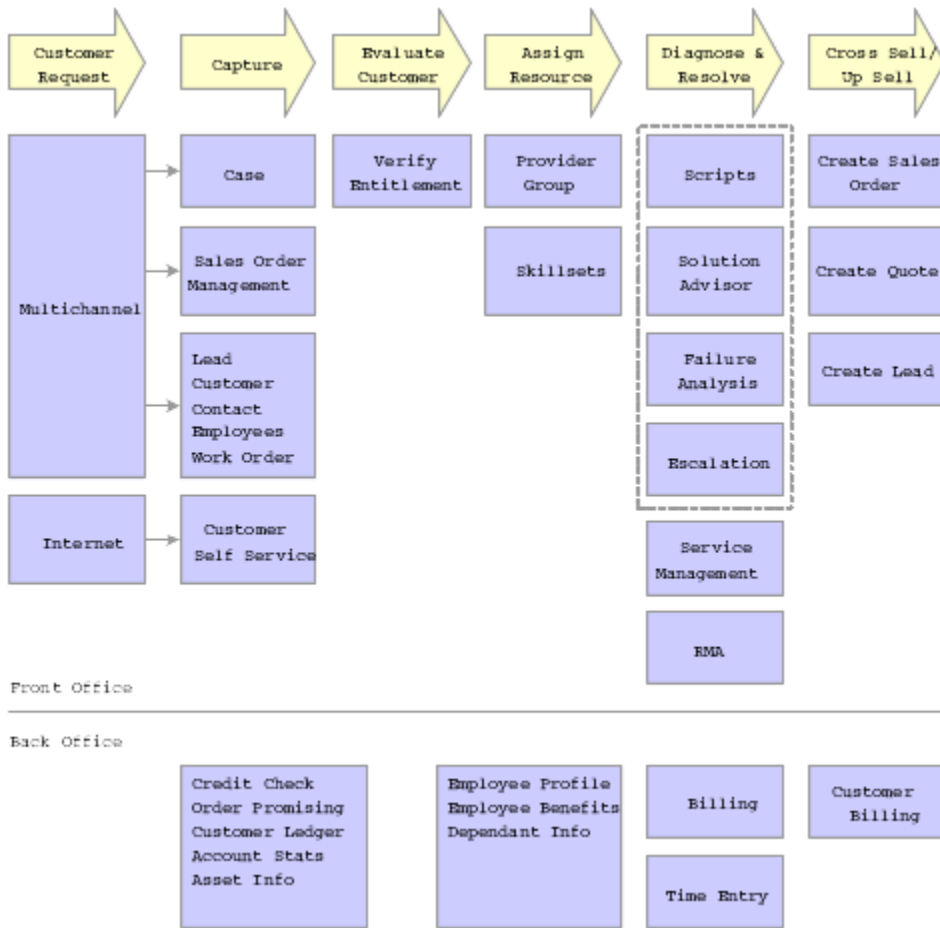
We discuss this business process in the business process chapters in this implementation guide.

1.4 JD Edwards EnterpriseOne CRM Support Applications Implementation

This section provides an overview of the steps that are required to implement the JD Edwards EnterpriseOne CRM Support Applications system.

In the planning phase of the implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne CRM Support Applications, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time that is required to search for and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools Software Updates Guide*.

For information about the Oracle Business Accelerator solution for implementation of JD Edwards EnterpriseOne CRM Support applications, review the documentation available.

See http://docs.oracle.com/cd/E24705_01/index.htm

1.4.1 Global Implementation Steps

The suggested global implementation steps for JD Edwards EnterpriseOne CRM products are:

1. Set up global UDC tables.

See *JD Edwards EnterpriseOne Tools Foundation Guide*.

2. Set up companies, fiscal date patterns, and business units.

See "Setting Up Organizations" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.

3. (Optional) Set up accounts, and the chart of accounts

See "Understanding the Chart of Accounts" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.

4. (Optional) Set up the General Accounting constants.

See "Setting Up the General Accounting System" in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.

5. (Optional) Set up multicurrency processing, including currency codes and exchange rates.

See "Setting Up General Accounting for Multicurrency Processing" in the *JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide*.

See "Setting Up Exchange Rates" in the *JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide*.

6. (Optional) Set up ledger type rules.

See "Setting Up the General Accounting System", "Setting Up Constants for General Accounting"*JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.

7. Set up branch/plant constants.

See "Setting Up the Inventory Management System" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.

1.4.2 Case Management-Specific Implementation Steps

The implementation steps for the JD Edwards EnterpriseOne Case Management system are:

1. Set up Case Management constants.

See Setting Up Case Management Fundamentals.

2. Set up Case Management user defined codes (UDCs).

See Setting Up Case Management Fundamentals.

3. Set up processing options for Case Management programs.

See Setting Up Case Management Fundamentals.

4. Set up case activity rules.

See Setting Up Case Management Fundamentals.

5. (Optional) Set up business object reservation.

    See Setting Up Case Management Fundamentals.

6. (Optional) Set up required fields.

    See Setting Up Case Management Fundamentals.

7. (Optional) Set up advanced pricing information for cases.

    See Setting Up Case Management Fundamentals.

8. Set up provider group UDCs and provider groups.

    See Setting Up Provider Groups.

9. Set up users as service providers.

    See "Setting Up Service Management" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

10. Set up customers.

    See "Managing Customer Information" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

11. (Optional) Set up queue security and queue properties.

    See Setting Up Provider Groups.

12. (Optional) Set up routing information.

    See Setting Up Provider Groups.

13. Set up case types and case priorities.

    See Setting Up Provider Groups.

14. Set processing options for Work With Provider Groups program (P17506).

    See Setting Up Provider Groups.

1.4.3 Case Management Billing-Specific Implementation Steps

The required implementation steps for billing in the JD Edwards EnterpriseOne Case Management system are

1. Set up distribution AAIs.

    See "Setting Up the Inventory Management System" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.

2. Set up accounts receivable AAIs.

    See "Setting Up the JD Edwards EnterpriseOne Accounts Receivable System" in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*.

3. Define the pricing method.

    See Setting Up Case Management Fundamentals.

1.4.4 Solution Advisor-Specific Implementation Steps

The required implementations step for the JD Edwards EnterpriseOne Solution Advisor system are:

1. Set up Solution Advisor UDCs.

    See Setting Up Solution Advisor.

1.5 Business Interface Integration Objects

A business interface is a set of components that implementation teams can use to create an integration between JD Edwards EnterpriseOne and an external system. Business interfaces can include one or more of these business interface components:

- Business Services

- Real-Time Events

- Batch Import and Export Programs

For additional information about business interfaces, and the business objects available for this product area, see these topics in the *JD Edwards EnterpriseOne Applications Business Interface Reference Guide:*

- Business Interfaces Overview

- Work Order - Service

2

Understanding CRM Support Applications

This chapter contains the following topics:

2.1 Support Applications

This section discusses:

- Case management
- Provider groups
- Escalation methods
- Solutions
- Scripting

2.1.1 Case Management

Case management creates a central point of contact for all customer service processes. Case management enables you to capture the details of the customer's problem, track a case from creation to resolution, and create work orders to fulfill requests.

You can use the case management programs to:

- Record contact between customers and consultants.

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

- Track a case with a single record.

  You enter information once, and the system provides that information to all of the parties who need it. When you identify a serial number, equipment number, or item number, the system uses the information from the equipment record and contract to complete the case entry form.

Use the Case-Manage form to enter and review all information related to a case. From this form, you have access to many other programs. This form provides tabs and access to the Case Entry (P90CG501), CRM Case Solutions (P90CG502), Case Activities (P90CG510), and CRM Case Related Actions (P90CG503) programs. You can also attach both internal and external messages or documents to the case by using media

objects. You can secure the media objects through activity rules to protect the original media objects. To change media objects, users must use the Append option. If you are billing for cases, you enter customer billing information by using forms that you access from the Case-Manage form.

By using the Related Links link in the Case Entry program, you can select each piece of a case that you want to review. You can access multiple contact, customer, supplier, employee, item and equipment, and contracts programs through this link. You can also access related programs (contact, customer, supplier, case time entry, item/equipment, contracts, supplemental data, and case history) from the Row menu on the Work With Case Management form. (Release 9.1 Update).

The Related Actions program, accessed through a tab in the Case Entry program, provides a list of objects that you can create and associate with the case, such as sales orders, quotes, work orders, equipment work orders, leads, scripts, and returned material authorization (RMA). You can then access the revision forms for these related actions through links on the form. These associations to the case are in the F90CG503 table that records the case or work order number, association type, lead ID, RMA number, and script ID. The F4801 table contains a secondary index for the case number for you to associate the case with the work order or equipment work order.

To help you manage cases, add activities such as messages or calendar items to a case through the Case Activities program, accessed through a tab on the Case Revisions form.

> **Note (Release 9.1 Update):** You can set processing options in the Case Entry program (P17500) to use the Speed Case Entry program (P90CG601) to quickly add a new case or update an existing case. The add and update mode of the Speed Case Entry program contains logical grouping of fields in nine collapsible groupboxes.
>
> Use the Speed Case Entry program to:
>
> - Access existing case information, enter new cases, or edit existing cases.
>
> - Access the Related Actions program (P90CG602) to view existing related actions or add new related actions. You can view the status of the related actions (wherever possible) in the grid of the Manage Related Actions form.
>
> See Entering and Updating Cases Using the Speed Case Entry Program (P90CG601) (Release 9.1 Update).

2.1.2 Provider Groups

Set up provider groups to ensure that cases are assigned to the appropriate people. For example, you might set up and organize provider groups according to product lines and group consultants who are knowledgeable about each product. You might also create provider groups to ensure that foreign language cases are directed to the appropriate groups.

Set up routing information to define the sequence and method by which cases are routed to the appropriate provider group.

2.1.3 Escalation Methods

The Service and Warranty Management (S/WM) Escalation method that you define in the S/WM System Constants program (P17001) determines how the system defines provider groups and escalates cases. You can decide to not perform escalations, escalate sending notifications, or escalate using skill levels.

If you determine to escalate cases using the notification method, Escalation Method 1 in S/WM System Constants, use the Distribution List Control program (P02150) to attach assignees to provider groups. Use the Queue Security program (P01135) to specify whether groups or specific users can make changes to the distribution lists. Use the Queue Properties program (P01133P) to define what programs distribution list members see when they open their Workflow queue.

The escalation percentages that you define on the Case Priority Revisions form determine how the system routes and escalates cases to distribution list members. When a case is assigned to a provider group, the system uses the values on this form to determine the escalation response time and sends notification to members on the distribution list that is assigned to the provider group.

If you determine to escalate cases using the skill level method, Escalation Method 2 in S/WM System Constants, you can assign members to provider groups using the Work With Provider Group Employees program (P90CG506). Through this program, you assign address book records (such as for employees or contractors) to provider groups and specify a skill level for each provider group member. You can assign any address book record to one or more provider groups, as long as the address book record has been set up as a service provider.

When cases are assigned to provider groups, the system compares the skill levels and case loads of each provider group member and assigns cases appropriately. The escalation percentages that you define on the Case Priority Revisions form determine when the system routes and escalates cases to provider group members.

2.1.4 Solutions

Solution Advisor, an additional software application that is used with cases, is a knowledge base application that assembles and classifies customer-specific information. Solution information is accessible by customers, as well as service and support agents, all of whom have the ability to search the knowledge base for an appropriate solution to a specific case or work order.

When you enter or review a case, you can access and assign solutions using the Solutions tab in the Case Revisions program. The Solutions application enables you to:

- Review the attempted solutions.

- Review the frequently used solutions.

- Search for solutions.

- Email solutions to the customer.

- Create a new solution that could be added to the Solution repository.

If you are not using Solution Advisor, you can set up and use the failure analysis module, a database that enables you to associate failures, analyses, and resolutions with cases and work orders.

See "Working with Failure Analysis" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*.

2.1.5 Scripting

Use the Script program (P90CF160), a separate software application, to guide you to a case solution or to help you identify the cause of an issue. A script is a predefined set of questions or statements that are joined in a specific order and used to gather information from respondents. You can use branch scripts or linear scripts to help you find a solution to an active case.

Scripts can be either branch scripts, which use conditional logic to determine a sequence of questions, or linear scripts, which contain a fixed set of questions in a fixed order. If you use branch scripts, the system displays different questions based on the answers provided to you by the respondent. Linear scripts present the same response and next question each time that the script is run, regardless of the answer to the previous question.

2.2 Case Processing

Case management uses the support applications to enter and manage cases from case entry to resolution.

This diagram illustrates the support applications integration:

Figure 2–1   Support applications integration
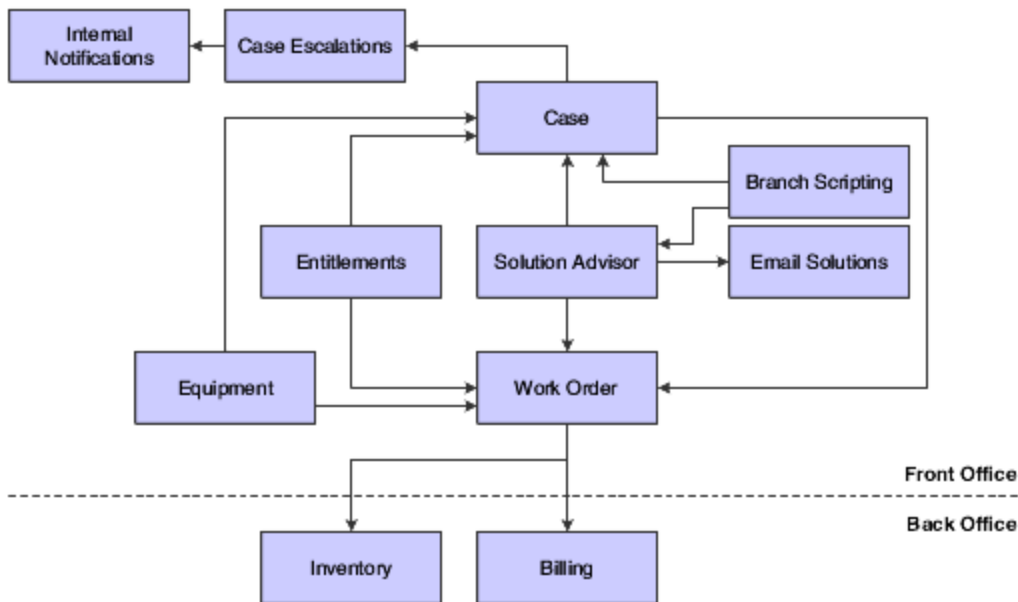
Call center agents and customers can enter case information. Customers can enter case information if they are using JD Edwards EnterpriseOne Customer Self Service from Oracle. After the case is entered in the system, you can use JD Edwards EnterpriseOne Solution Advisor to search for and find possible case resolutions and email those solutions to the customers or other interested parties. You can also use branch scripting to further identify the problem source or guide you to possible case resolutions.

When you enter cases in the system, the escalation routine that you defined guides the case processing to provider group members and sends the associated notifications. The system also manages escalation processing if assignment, response time, or case priority changes.

If necessary, you can initiate a work order to resolve cases, and then process the associated billing transactions in the system. You can also set up the system to bill for cases and have the system process the appropriate transactions.

2.3 Hotkeys for CRM Support

You can navigate and interact with JD Edwards EnterpriseOne applications using hotkeys for quicker, more efficient workflow. Hotkeys are designed to work in conjunction with the browser's existing hotkeys and enable you to work solely using the keyboard.

There are several hotkeys that you can use to navigate through all JD Edwards EnterpriseOne applications. For example, you can press the Tab key on the keyboard to move the focus to the next field, button, or hotlink on any JD Edwards EnterpriseOne form. In addition to those hotkeys, additional hotkeys are available that enable you to use buttons on CRM Support forms without using the mouse.

To use these hotkeys, you must hold down the Shift and the Ctrl buttons on the keyboard while you press the hotkey. For example, N is the hotkey for the Add Answers button. To add answers to a script without clicking the Add Answers button, you press Shift + Ctrl + N on the keyboard.

This table lists all of the CRM support hotkeys:

Button	Hotkey
Add Answers	N
Add Any Node	Y
Add Question	Q
Add Script	P
Assign Solution	N
Clear Default	L
Clone	L
Delete Node	D
Edit	D
Email Selected Solutions	M
Finish	N
Launch Case	L
Launch Email	M
Next	N
No	N
Preview Runtime	M
Previous	P
Search	Q
Set Default	U
Validate Script	L
Yes	Y

See Also:

- *JD Edwards EnterpriseOne Tools Foundation Guide.*

3

Setting Up Case Management Fundamentals

This chapter contains the following topics:

3.1 Understanding Case Management Setup Requirements

Before you can use any of the features of the JD Edwards EnterpriseOne Case Management programs, you need to define information that the system uses for controlling and processing cases. You also need to specify information that is used when you enter data into the system, such as when you enter a case, and the method used to escalate cases. The escalation method is defined through the system constants. When you enter cases, you can also assign tasks to cases.

3.2 Setting Up Case Management User Defined Codes (UDCs)

This section provides an overview of case management UDCs.

3.2.1 Understanding Case Management UDCs

Before you can use any of the features of the support applications, such as JD Edwards EnterpriseOne Case Management, you need to define information that the system uses for processing. You also need to specify the data that is used when you enter cases in the system.

You can access most of these UDCs from the Case User Defined Codes menu (G17431). You can access all other UDC tables by entering **UDC** in the fast path field.

This table describes the information that you must set up for cases:

UDC	Type of Data
17/PR	Case Priority

UDC	Type of Data
17/CR	Case Reason
17/SC	Case Source
17/ST	Case Status
17/CT	Case Type
17/EN	Environment
17/GR	Geographic Region
H91/TZ	Time Zones
17/WT	Work Type
17/CB	Call Back
17/TN	Task Name
17/01 through 17/10	Case Category Codes 1 through 10
00/RR	Object In Use Application ID.
	Use this UDC table to check when objects are in use in specific applications and to limit access to a record to only one user at a time.
	Set this UDC to check access in the Case Revisions program (P90CG501). To activate record locking, enter **1** as the first character in the Special Handling Code field. If you do not want to activate record locking, enter **0** as the first character in the Special Handling Code field.
01/ST	Address Book Search Type.
	Set up a search type in the Address Book to define provider groups.

3.3 Setting Up Case Management Constants

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

This section discusses how to set up Case Management constants. You must also set up the Customer Relationship Management (CRM) constants to activate the implicit save for case records.

See "Setting Up the CRM Foundation System" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

3.3.1 Form Used to Set Up Case Management Constants

Form Name	FormID	Navigation	Usage
S/WM System Constants Revisions	W17001C	Case Setup (G90CG), Service and Warranty Constants	Set up case constants.

3.3.2 Setting Up Case Management Constants

Access the S/WM System Constants Revisions form.

3.3.2.1 General

Select the General tab.

Figure 3–1   S/WM System Constants Revision form: General tab

Check for Previous Cases and Work Orders on Customers
Select this option to check for any previous cases and work orders for the current customer number when you enter cases or work orders.

Check for Previous Cases and Work Orders on Piece of Equipment
Select this option to check for any previous cases and work orders for the current product (inventory number) when you enter cases or work orders.

3.3.2.2 Case

Select the Case tab.

Figure 3–2   S/WM System Constants Revision form: Case tab

Provider Group Search Type
Enter the value from UDC 01/ST that specifies the Address Book search type for provider groups. When you add a provider group through the Provider Group Revisions program (P17506), the record is added to the F1797 table and the F0101 table with this search type.

Responsible BU Location (responsible business unit location)
Enter a code which determines which table the system uses to retrieve the responsible business unit for billing cases. Values are:

1: Inventory table (F4117/F41171).

2: Product Family/Model table (F1791).

3: Equipment table (F1201).

4: Customer Number table (F0101).

5: S&WM Line Type (Service and Warranty Management line type) table (F1793).

6: S&WM Customer Number (Service and Warranty Management customer number) table (F1797).

Type of Service
Enter a value from UDC 00/TY to indicate the classification type of request that is used for an entitlement check. The default value is **W** (case).

Mail Box for Escalation
Enter value from UDC 02/MB to define the location to hold messages for escalation.

Case Entitlement Trigger
Enter a value from UDC 17/ET to specify which field activates entitlement checking when you enter a case.

Escalation
Select the escalation method. Values are:

0: Do not use an escalation method.

1: Escalate using notification.

Escalations are processed using the work center notification and by email.

2: Escalate using skill-levels.

See Setting Up Case Priorities Using Notification Escalation Method.

and

See Setting Up Priorities Using Skill-Level Escalation Method.

Message Center Interface
Select this check box to create a message for the case and the task records. You can view the message in the Work Center.

Dynamic Word Rebuild
Reserved for future use.

Who's Who Required
Select this check box to specify whether the caller name for a case is required and must reside in the Address Book - Who's Who records. If this check box is selected, you cannot add the case unless the caller name is selected from the visual assist and resides in the F0111 table.

Log Status Change
Select this check box to specify whether the system records call status changes to the text that is associated with a case. If you select this check box, the system generates a line of text that includes the original status, the new status, the user, and a date and time stamp.

Use Base Price
Select this check box to specify whether the system uses base price for calculating case price. Select this field if you are using base pricing. If you are using advanced pricing, do not select this field; you need to set up additional fields for advanced pricing, which is discussed later in this chapter.

See Setting Up Advanced Pricing Information for Cases.

Use Solution Advisor
Select this field to specify whether to use the Solution Advisor application. If you do not select this field, the system will use failure analysis.

See Setting Up Solution Advisor.

and

See "Working with Failure Analysis" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*.

3.4 Setting Up Processing Options for Case Management

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

This section discusses how to set processing options for:

- The Case MBF Processing Option program (P90CG002).

  See Setting Processing Options for the Case MBF Processing Options Program (P90CG002).

- The Case Entry program (P90CG504).

  See Setting Processing Options for the Case Entry Program (P90CG504).

- The Case Update program (P90CG501).

  See Setting Processing Options for the Case Update Program (P90CG501).

- The Case CSS Inquiry and Add program (P90CG900).

  See Setting Processing Options for the Case CSS Inquiry and Add Program (P90CG900).

- The CSS Case Update program (P90CG910).

  See Setting Processing Options for the CSS Case Update Program(P90CG910).

- The Tasks program (P17504).

  See Setting Up Processing Options for the Tasks Program (P17504).

- The Work With Case program (P17500).

  See Setting Up Processing Options for the Work With Case Program (P17500).

- The Speed Case Entry program (P90CG601).

  See Setting Processing Options for Speed Case Entry (P90CG601) (Release 9.1 Update).

- The Time Entry program (P17505).

  See Setting Up Processing Options for Time Entry (P17505).

- CRM Case Related Actions (P90CG503).

  See Setting Up Processing Options for CRM Case Related Actions (P90CG503).

Before you can process case information, you must set the processing options for several programs. These programs define and control how information is processed when you enter and revise cases. If you are using Customer Self Service, you must also define the processing options for CSS Inquiry and Add and CSS Case Update programs.

> **Note:** This section includes only those processing options that are required to be set up during implementation and are used to define system-wide processes. To access these processing options, enter **IV** in the fast path, and then enter the program ID in the Interactive Application field.

3.4.1 Setting Processing Options for the Case MBF Processing Options Program (P90CG002)

Use these processing options to define the basis for the JD Edwards EnterpriseOne Case Management system.

3.4.1.1 Default

Access the Default tab.

1. Document Type

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

2. Problem

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

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

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

3. Caller Name

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

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

1: Use the customer name as the caller name.

4. Assignee

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

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

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

5. Reporting Codes

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

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

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

6. Phone Number Type for the fax number

Use this processing option to define the phone number type for fax number. This is user defined code (01/PH) that indicates the use of the phone number.

7. Status for Case is assigned

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

8. Provider Group

Use this processing option to indicate the default Provider Group number. The Provider Group number that you enter in this processing option overrides the Provider Group from routing rules.

9. Case Type

Use this processing option to specify the case type that the system uses as a default for the Work With Case program (P17500). Enter a value from UDC 17/CT. If you leave this processing option blank, the system uses the default value from the data dictionary.

10. Cost Type

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

11. Pricing Units

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

12. Pricing Unit of Measure

Use this processing option to specify the default unit of measure used by the system to retrieve advanced pricing information. This option is used for billing for maintenance requests in which the pricing method is flat rate. Enter a value from UDC 00/UM (unit of measure). If you leave this processing option blank, the system uses **EA** (each).

13. Call Reason

Use this processing option to indicate the default Call Reason.

14. Responsible Business Unit

Use this processing option to indicate the default Responsible Business Unit.

3.4.1.2 Display

Access the Display tab.

1. Routing Information

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

Blank: Hide routing information.

1: Display routing information.

2. Equipment Information

Use this processing option to determine whether the system displays the equipment information when the Customer Number is entered. Values are:

Blank: Do not display equipment information.

1: Display equipment information.

3. Who's Who Search/Select

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

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

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

3.4.1.3 Versions

Access the Versions tab.

Processing Options 1 through 34

Use these processing options to specify the default version of each program. These processing options do not apply to the Case application (P17501E). The default version of each program is listed here:

1. Work With Previous Customer Case (P17500) Version.

   Default version = ZJDE0002.

2. Work With Previous Product Case (P17500) Version.

   Default version = ZJDE0003.

3. Case History (P17500) Version.

   Default version = ZJDE0004.

4. Work With Tasks (P17504) Version.

Default version = ZJDE0001.

5. Time Entry (P17505) Version.

Default version = ZJDE0001.

6. Quick Customer/Contact Add (P01015) Version.

Default version = ZJDE0001.

7. Address Book Revisions (P90CA080) Version.

Default version = ZJDE0001.

8. Customer Master (P90CA080) Version.

Default version = ZJDE0001.

9. Customer Ledger Inquiry (P03B2022) Version.

Default version = ZJDE0001.

10. Vendor Master (P04012) Version.

Default version = ZJDE0001.

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

Default version = ZJDE0001.

12. Payment Inquiry (P0413M) Version.

Default version = ZJDE0001.

13. Eligibility (P08334) Version.

Default version = ZJDE0001.

14. Employee DBA Instructions (P050181) Version.

Default version = ZJDE0001.

15. Employee Profile (P060116) Version.

Default version = ZJDE0001.

16. Work With Employee (P0801) Version.

Default version = ZJDE0001.

17. Sales Order Entry (P42101) Version.

Default version = ZJDE0006.

18. Supply and Demand Inquiry (P4021) Version.

Default version = ZJDE0001.

19. Inquiry by Equipment (P48201) Version.

Default version = ZJDE0002.

20. Work Order Revisions (P17714) Version.

Default version = ZJDE0001.

21. Supplemental Data - Customer (P00092) Version

Default version = ZJDE0003.

22. Supplemental Data - Item (P00092) Version.

Default version = ZJDE0001.

23. Supplemental Data - Work Order (P00092) Version.

Default version = ZJDE0007.

24. Supplemental Data - Sales Order (P00092) Version.

Default version = ZJDE0018.

25. Equipment Master Inquiry (P1701) Version.

Default version = ZJDE0001.

26. Equipment Master Revisions (P90CD0001) Version.

Default version = ZJDE0001.

27. Contracts (P1720) Version.

Default version = ZJDE0001.

28. Print Case (R17674) Version.

Default version = ZJDE0003.

29. Case Workfile Generation (R17675) Version.

Default version = ZJDE0001.

30. Service Billing Inquiry (P4812) Version.

Default version = ZJDE0001.

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

Default version = ZJDE0001.

32. Work with Failure Analysis (P17766) Version.

Default version = ZJDE0001.

33. Failure Analysis (P17767) Version.

Default version = ZJDE0001.

34. Failure Analysis Search and Select (P17768) Version.

Default version = ZJDE0001.

3.4.1.4 Edits

Access the Edits tab.

1. Entitlement Check
Use this processing option to specify how the system performs the entitlement check. Values are:

Blank: Do not perform entitlement checking.

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

2: Check the entitlement without the date table (F1791).

2. Maximum days for reopening Case
Use this processing option to specify the maximum number of days that you can reopen a closed case. If you leave this processing option blank, you cannot reopen a closed case.

3. Date/Time Opened

Use this processing option to specify whether the system uses the current date and time as the beginning date and time when you reopen a case. Values are:

Blank: The original date and time that the case was opened remain on the case.

1: The system uses the current date and time as the beginning date and time for the case.

4. Date/Time Returned

Use this processing option to specify whether to clear the date and time when a case is reopened. Values are:

Blank: Leave the original date and time in the case.

1: Clear the date and time in the case.

5. Area Code and Phone Number

Use this processing option to specify whether the system requires you to enter the area code and phone number when you enter a case. Values are:

Blank: Require the area code and phone number.

1: Do not require the area code and phone number.

6. Reason Code

Use this processing option to specify whether to require a reason code when you close a case. Values are:

Blank: Do not require a reason code.

1: Require a reason code.

3.4.1.5 Process

Access the Process tab.

1. Copy the text

Use this processing option to specify whether the system copies media object text when you copy a case. Values are:

Blank: Do not copy media object text.

1: Copy media object text.

2. Date/Time stamp

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

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

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

3. Protect the Provider Group

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

Blank: Allow changes to the queue number.

2: Do not allow changes to the queue number.

4. Protect Pricing Method

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

Blank: Allow changes to the pricing method.

1: Prevent changes to the pricing method.

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

5. Customer inconsistent with Equipment Master

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

Blank: Do not compare the customer numbers.

1: Display a prompt to update the customer number on the equipment master to match the customer number on the case.

2: Automatically update the customer number on the equipment master to match the case customer number.

6. Site inconsistent with Equipment Master

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

Blank: Do not compare the site numbers.

1: Display a prompt to update the site number to the equipment master to match the case site number.

2: Automatically update the site number to the equipment master to match the case site number.

7. Validate assignee in Provider Group

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

Blank: Do not check whether assignee is in queue.

1: Display error when assignee is in queue.

2: Display warning when assignee is in queue.

8. Check required fields

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

Blank: Do not check the required fields.

1: Check the required fields.

9. Bill for Cases

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

Blank: Do not bill for maintenance requests.

1: Bill for maintenance requests.

10. Next Number Processing

Use this processing option to specify whether the system captures next numbers that are temporarily assigned, but not used on permanent records. Values are:

Blank: Do not capture burned next numbers.

1: Save burned next numbers as status 3.

3.4.1.6 Vertex

Access the Vertex tab.

1. Transaction Type for Flat Rate Billings

Use this processing option to specify the default transaction type for flat rate billing. If you leave this option blank, the system uses **SERVIC**.

This processing option only pertains if Vertex's Quantum Sales and Use Tax Software (third-party tax software) has been implemented.

3.4.2 Setting Processing Options for the Case Entry Program (P90CG504)

Use these processing options to set up default processing for the Case Entry Program (P90CG504).

3.4.2.1 Versions

Access the Versions tab.

1. Case Master Business Function (P90CG002) for Case Add and 2. Case Update (P90CG501) Version.

Use these processing options to define the default version of the P90CG002 and P90CG501 programs. If you leave these options blank, the system uses version ZJDE0001.

3.4.3 Setting Processing Options for the Case Update Program (P90CG501)

Use these processing options to define default processing for the Case Update program (P90CG501).

3.4.3.1 Version

Access the Version tab.

1. Case Master Business Function (P90CG002) Version.

Use this processing option to define the default version of the P90CG002 program. If you leave this option blank, the system uses version ZJDE0001.

3.4.4 Setting Processing Options for the Case CSS Inquiry and Add Program (P90CG900)

Use these processing options to define default processing for the Case CSS Inquiry and Add program (P90CG900).

3.4.4.1 Versions

Access the Versions tab.

1. CSS Case Add (P90CG904) Version and 2. CSS Case Update (P90CG910) Version
Use these processing options to define the default versions of the P90CG904 and P90CG910 programs. If you leave these options blank, the system uses version ZJDE0001.

3.4.5 Setting Processing Options for the CSS Case Update Program(P90CG910)

Use these processing options to define default processing for the CSS Case Update program (P90CG910).

3.4.5.1 Version

Access the Version tab.

1. Case Master Business Function (P90CG002) Version.
Use this processing option to define the default version of the P90CG002 program. If you leave this option blank, the system uses version ZJDE0001.

3.4.6 Setting Up Processing Options for the Tasks Program (P17504)

You can configure the work space by setting processing options to include only the information with which you work directly. Some of the available options include case sequencing, sorting cases by priority or status, and preloading information to the work space to limit the information that appears. You can also lock tasks so that only one user at a time can review and change case information.

3.4.6.1 Defaults

The processing options on this tab define the defaults that the system uses when you run inquiries on tasks. Although you can override these values to search for tasks, you can specify defaults that are standard to most tasks on which you run inquiries in this version of Work With Tasks.

1. From status and 2. To status
Specify the From status or the To status. The system displays only those tasks that are within the status specified in the From status and To status processing options.

3. Document Type
Specify the document type for the system to use when you add a task directly through the Work With Tasks program. Document type CL (call) is the default. Enter document type if the case document type is different.

4. Status to use when a task is assigned.
Define the case status code from UDC 17/ST to use when a task is assigned.

5. Default the Assignee as the User
Specify the user as the default for the assignee. The system displays task that are assigned to the user. Values are:

Blank: Do not specify.

1: Specify.

6. Default Document Type
Specify the document type for the system to use when you add a task directly through the Case Update program. The document type CL (call) is the default. Enter the document type if the case document type is different.

3.4.6.2 Edits
The processing option on this tab defines what information the system verifies when you enter a task.

1. Maximum Days for Reopening a Task
Specify the maximum number of days that a task can be closed and reopened. This processing option specifies the number of days that a closed task is eligible to be reopened. If you leave this processing option blank, the program does not check the number of days. Otherwise, enter a number to specify the number of days in which a user can reopen a task after it is closed.

2. Entitlement
Use this processing option to specify how the system performs the entitlement check. Values are:

Blank: Do not perform entitlement checking.

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

2: Check the entitlement without the date table (F1791).

3.4.6.3 Process
The processing options on this tab define the processing that the system performs for this version of Work With Tasks.

1. Check Required Fields
Specify whether the system verifies that there is information in the required fields. You define which fields are required in the Required Fields Setup program (P1759). Values are:

Blank: Do not check.

1: Check.

See Setting Up Required Fields.

2. Notify when task is entered/closed
Specify whether the system sends notification when a task is entered or closed. Values are:

Blank: Do not send.

1: Send notification to provider group when task is entered and to originator when task is closed.

3. Notify Assignee
Specify whether the system sends notification to the assignee. Values are:

Blank: Do not notify.

1: Notify.

4. Notify Queue

Specify if the system notifies the provider group. Values are:

Blank: Do not notify.

1: Notify.

5. Bill for Cases

Use this processing option to specify whether to bill for maintenance requests. You must activate this processing option if you need to enter billing information for maintenance requests. Values are: Blank Do not bill for maintenance requests. 1 Bill for maintenance requests.

3.4.6.4 Versions

These processing options control the version that the system uses when it calls these programs:

1. Time Entry (P17505) Version,, and 2. Work with Failure Analysis (P17766) Version

Use these processing options to specify the default version. If you leave these processing options blank, the system uses the ZJDE0001 default version.

3.4.7 Setting Up Processing Options for the Work With Case Program (P17500)

You can customize the work space by setting processing options to include only the information with which you work directly. Some of the available options include case sequencing, sorting cases by priority or status, and preloading information to the work space to limit the information that appears. You can also lock cases so that only one user at a time can review and change case information.

3.4.7.1 Display

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

1. Time Zone Filter

Specify whether the system verifies the time zone of the customer. The system displays cases based on time zones. Values are:

Blank: Bypass time zone filter.

1: Check time zone filter.

If you select the option to check the time zone and then set the processing option to verify a call back time, the system verifies whether the time at the customer's location in the customer's time zone is within business hours. If the customer time is earlier or later than the business hours, the system does not display the calls.

2. Starting Call Back Time

Specify the call-back time to filter calls. If the time at the customer location is earlier than this time and time zone filter check box on the Work With Case form is selected, the system does not display the calls. When you enter a call-back time, you must enter military time and include the hour, minutes, and seconds. For example, 130000 for 13:00:00.

If you set this processing option to verify a call back time and select the option to check the time zone filter, the system verifies whether the time at the customer's location is earlier than that current time. If the customer time is earlier than the current

time, the system does not display the calls.

3. Country Code
Specify whether the system displays the Country Code field for you to use as selection criteria. Values are:

Blank: Hide.

1: Display.

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

4. Language
Specify whether to display the Language field. Values are:

Blank: Hide.

1: Display.

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

5. From status and 6. To status
Specify the From status or the To status. The system only displays those cases that are within the status specified in the From status and To status processing options.

7. Number of days to use for date filter
Specify a number of days with which the system uses to calculate the Date Entered From/Thru fields. The system displays only cases within this date range.

If you leave this processing option blank, the system does not calculate filter dates.

8. Priority column
Specify whether the system displays priority with color. The color setup is defined in UDC 17/PR in the Special Handling column. Values are:

Blank: Without color.

1: With color.

10. In Use cases
Specify whether the system displays the cases that are currently in use by a user. Cases that are in use are locked in the system so that only one user at a time can access case information. Values are:

Blank: Display locked cases.

1: Do not display locked cases.

3.4.7.2 Defaults
The processing options on this tab define the defaults that the system uses when you run inquiries on cases. Although you can override these values to search for cases, you can specify defaults that are standard to most cases on which you run inquiries in this version of Work With Case, such as country code, language code, assignee, and provider group.

1. Country Code

Specify the country code that the system uses when the Country Code field appears. The system displays cases that have this country code.

If you leave this processing option blank, the system does not use a specific country code in the selection criteria.

You must also set the Display Country Code processing option on the Display tab to display country codes.

2. Language

Specify which language to retrieve as the default language when the Language field is displayed. The system displays only cases that indicate this particular language preference.

If you leave this processing option blank, the system does not retrieve a default language.

You must also set the Display Language processing option on the Display tab to display languages.

3. Assignee

Specify the user as the default for the assignee. The system displays cases that are assigned to the user. Values are:

Blank: Do not specify.

1: Specify.

4. Provider Group

Specify the default provider group in the selection criteria. The system displays only cases that are assigned to this provider group. Values are:

0: Do not specify.

Specific queue: Specify.

5. Document Type

Use this processing option to specify the default document type.

6. Case Reason

Use this processing option to specify the default case reason.

7. Responsible Business Unit

Use this processing option to specify the default responsible business unit.

3.4.7.3 Versions

The processing options on this tab defines the versions that the system uses when it calls these programs:

1. Case Update (P90CG501) Version

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

2. Case Add (P90CG504) Version

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

3. Work Center (P012501) Version
Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0005 default version.

4. Speed Case Entry for Add (P90CG601) (Release 9.1 Update)
Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0001 default version.

5. Speed Case Entry for Update (P90CG601) (Release 9.1 Update)
Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0001 default version.

6. Case Master Business Function (P90CG002) (Release 9.1 Update)
Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0001 default version.

3.4.7.4 Process

The processing options on this tab define the processing that the system performs for this version of Work With Case.

1. Deleting Records
Specify whether the system deletes records from the F17500 table. Values are:

Blank: Delete.

1: Do not delete, but change its status to 4.

2. Use Speed Case Entry for Add (Release 9.1 Update)
Specify whether you want to use the Case Add program (P90CG504) or the Speed Case Entry program (P90CG601) to add new case records. Values are:

Blank: Do not use the Speed Case Entry program to add new case records.

1: Use the Speed Case Entry program to add new case records.

3. Use Speed Case Entry for Update (Release 9.1 Update)
Specify whether you want to use the Case Update program (P90CG501) or the Speed Case Entry program (P90CG601) to update existing case records. Values are:

Blank: Do not use the Speed Case Entry program to update existing case records.

1: Use the Speed Case Entry program to update existing case records.

3.4.8 Setting Processing Options for Speed Case Entry (P90CG601) (Release 9.1 Update)

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

3.4.8.1 Display

1. Specify the open/closed state for the Customer section when the Case Entry (P90CG601) application loads
Specify whether the Customer groupbox is open or closed when you open the Speed Case Entry form and the Case Revisions form. Values are:

Blank: Section closed in both add mode and update mode.

1: Section open in both add mode and update mode.

2: Section closed in add mode and open in update mode.

3: Section open in add mode and closed in update mode.

2. Specify the open/closed state for the Issue section when the Case Entry (P90CG601) application loads
Specify whether the Issue Description groupbox is open or closed when you open the Speed Case Entry form and the Case Revisions form. Values are:

Blank: Section closed in both add mode and update mode.

1: Section open in both add mode and update mode.

2: Section closed in add mode and open in update mode.

3: Section open in add mode and closed in update mode.

3. Specify the open/closed state for the Attachments section when the Case Entry (P90CG601) application loads
Specify whether the Attachments groupbox is open or closed when you open the Speed Case Entry form and the Case Revisions form. Values are:

Blank: Section closed in both add mode and update mode.

1: Section open in both add mode and update mode.

2: Section closed in add mode and open in update mode.

3: Section open in add mode and closed in update mode.

4. Specify the open/closed state for the Case Detail section when the Case Entry (P90CG601) application loads
Specify whether the Case Detail groupbox is open or closed when you open the Speed Case Entry form and the Case Revisions form. Values are:

Blank: Section closed in both add mode and update mode.

1: Section open in both add mode and update mode.

2: Section closed in add mode and open in update mode.

3: Section open in add mode and closed in update mode.

5. Specify the open/closed state for the Product Information section when the Case Entry (P90CG601) application loads
Specify whether the Product Information groupbox is open or closed when you open the Speed Case Entry form and the Case Revisions form. Values are:

Blank: Section closed in both add mode and update mode.

1: Section open in both add mode and update mode.

2: Section closed in add mode and open in update mode.

3: Section open in add mode and closed in update mode.

6. Specify the open/closed state for the Category Codes section when the Case Entry (P90CG601) application loads
Specify whether the Category Codes groupbox is open or closed when you open the Speed Case Entry form and the Case Revisions form. Values are:

Blank: Section closed in both add mode and update mode.

1: Section open in both add mode and update mode.

2: Section closed in add mode and open in update mode.

3: Section open in add mode and closed in update mode.

7. Specify the open/closed state for the Additional Information section when the Case Entry (P90CG601) application loads
Specify whether the Additional Information groupbox is open or closed when you open the Speed Case Entry form and the Case Revisions form. Values are:

Blank: Section closed in both add mode and update mode.

1: Section open in both add mode and update mode.

2: Section closed in add mode and open in update mode.

3: Section open in add mode and closed in update mode.

8. Specify the open/closed/hidden state for the User Reserved Fields section when the Case Entry (P90CG601) application loads
Specify whether the User Reserved Fields groupbox is open, closed, or hidden when you open the Speed Case Entry form and the Case Revisions form. Values are:

Blank: Section closed in both add mode and update mode.

1: Section open in both add mode and update mode.

2: Section closed in add mode and open in update mode.

3: Section open in add mode and closed in update mode.

4: Section hidden in both add mode and update mode.

3.4.8.2 Process

1. Specify the case cancelled status
Specify the value that you want to use for cancelled status of a case. The system uses this value in the Cancel Case button. If you leave this processing option blank, the system uses **997** as the default value.

3.4.8.3 Versions

1. Case Master Business Function (P90CG002) Version
Specify the default version of the Case Master Business Function program (P90CG002). You use this processing option to control the versions of the programs that you access from the Row menu. If you leave this processing option blank, the system uses the ZJDE0001 default version.

3.4.8.4 Edit

1. Validate problem code against failure codes
Specify whether the system validates the problem code against failure codes. If you set this processing option to validate problem codes against failure codes, the Problem field is disabled in the Case Revisions form and the system uses the failure description as the default problem description. If you do not set this processing option to validate problem codes against failure codes, you can edit the value in the Problem field to override the failure description. Values are:

Blank: Do not validate.

1: Validate.

3.4.9 Setting Up Processing Options for Time Entry (P17505)

When you resolve a case, you need to enter time in order to accurately capture the amount of time spent on the issue for billing purposes. If you have contract and warranty agreements with customers that do not require billing by the hour, you still might need to report the time for accounting purposes. You can set the processing options to create either payroll batch transactions or general ledger transactions.

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

When you enter a case, the system calculates time entry information based on the time when you access the Case Entry form and the time when you exit the form. You can override the information, if necessary.

3.4.9.1 Process

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

1. Write time entry records
Specify the tables to which the system writes the time entry records. Values are:

Blank: Only F17860 table.

1: F0911Z1 and F17860 tables.

2: F06116Z1 and F17860 tables.

2. Protected time entry line
Specify whether you can change the time entry line when you inquire on time entry information. Values are:

Blank: Do not protect.

1: Protect.

3. Round Actual Hours
Specify how to display the actual hours worked. Values are:

Blank: Display actual hours.

1: Round to the quarter hour.

2: Round to a tenth of an hour.

3: Round to the half hour.

4. Round Billable Hours
Specify whether to round the billable hours. Values are:

Blank: Do not round.

1: Round to the quarter hour.

2: Round to a tenth of an hour.

3: Round to the half hour.

5. Protect Minimum Hours and Amount
Specify whether to protect the information in the Minimum Hours and the Minimum Amount fields. Values are:

Blank: Do not protect.

1: Protect.

6. Use Flex Accounting (FUTURE)

(Future Use) Specify whether to use flex accounting. Values are:

Blank: Do not use.

1: Use.

3.4.9.2 Defaults

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

1. Hour Type

Specify the default hour type description code from UDC 17/WT. If you leave this processing option blank, the system does not retrieve the description.

2. Cost Type

Specify the default cost type if you bill for cases and the pricing method is time and materials.

Typically, you enter **B1** (direct labor) as the default, or you can enter another value from UDC 30/CA (cost component add-ons).

3. Labor Unit of Measure

Specify the labor unit of measure for the Time Entry program.

Enter a value from UDC 00/UM. If you leave this processing option blank, the default for the Labor Unit of Measure field is **HR** (hours).

4. Minimum Hours

Specify the minimum hours on each time entry record. If you leave this option blank, the default for the Minimum Hours field is **0.**

5. Subledger

Specify the information that the system records in the Subledger field when you create time entry records for the F06116Z1 or the F0911Z1 table. Values are:

Blank: Leave the Subledger field blank.

1: Case number.

2: Customer number.

3: Site number.

4: Short item number.

5: Contract number.

6: Equipment number.

6. Labor Unit of Measure for Hour

Specify the unit of time that the system uses for the Hour field, such as **HR**. The system uses this processing option for Labor Unit of Measure conversion.

You must specify a value for this processing option if you want the system to upload the time entry record to the F06116Z1 table.

Enter a value from UDC 00/UM.

7. PDBA Code

Specify the default value for the PDBA code. The PDBA code defines the type of pay, deduction, benefit, or accrual. If you leave this processing option blank, the system leaves the PDBA code blank.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

3.4.9.3 Versions

The processing options on this tab defines the versions that the system uses when it calls these programs:

1. Service Billing Inquiry (P4812), 2. Customer Ledger Inquiry, and 3. Time Entry MBF (P050002A)

If you leave these processing options blank, the system uses the ZJDE0001 default version.

3.4.9.4 Vertex

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

1. Transaction Type for Labor Billings

Specify the Vertex transaction type that the system uses when calculating taxes for time entry billing. Use this transaction type only if you bill for cases and the pricing method is Time and Materials.

Enter a value from UDC 83/TY (Vertex Transaction Type). If you leave this processing option blank, the system uses the transaction type **SERVIC.**

3.4.10 Setting Up Processing Options for CRM Case Related Actions (P90CG503)

From the Case Revisions form or the Case Entry form, you can create and review a list of actions related to the case. Through the Related Actions tab, you can access other programs to associate sales orders, quotes, work orders, returned material authorization (RMA), scripts, action plans, and leads to cases.

3.4.10.1 Versions

The processing options on this tab defines the versions that the system uses when it calls these programs:

1. Sales Order (P42101) Version, 2. Quote (P42101) Version, and 3. Leads (P90CB010) Version

Use this processing option to specify the default version of the program. If you leave these processing options blank, the system uses the ZJDE0001 default version.

4. Work Order (P90CD002) Version and 5. Return Material Authorization (P400511) Version

Use this processing option to specify the default version of the program. If you leave these processing options blank, the system uses the ZJDE0001 default version.

6. Script (P90CF160) Version, 7. Script Runtime (P90CF180) Version, and 8. Equipment Work Order (P17714) Version

Use this processing option to specify the default version of the program. If you leave these processing options blank, the system uses the ZJDE0001 default version.

3.5 Setting Up Business Object Reservations

This sections provides an overview of business object reservations, lists a prerequisite, and discusses how to use business object reservations.

3.5.1 Understanding Business Object Reservations

Use the Business Object Reservation program (P00095) to view records, such as cases, that are locked. This program is shared by other programs as well, such as the Employee Master program and the Work Order Entry program, to review and unlock records. You can use this program to unlock records that have been locked because of system issues.

3.5.2 Prerequisite

You must define the program as a value in the Object in Use Application ID UDC (00/RR). For example, if you want to view cases that are locked, you must set up the Case Update program as a value in the Object in Use Application ID UDC.

3.5.3 Form Used to Set Up Business Object Reservations

Form Name	FormID	Navigation	Usage
Business Object Reservations	W00095A	Periodic Support Processing (G90CE02), Business Object Reservations	Search for records that are locked. If you want to unlock a record, select the record and click theDelete button.

3.5.4 Using Business Object Reservations

Access the Business Object Reservations form.

Object Name
Enter the name that identifies a system object in the header area or on the Query By Example (QBE) line. Examples of system objects include:

Batch applications (such as reports)

Interactive applications

Business views

Business functions

Business function data structures

Event rules

Media object data structures

Application
Enter the batch or interactive program number in the QBE line.

3.6 Setting Up Required Fields

You can define the fields in which you are required to enter information before the system advances a case to the next status in the queue. Required fields can be based on

specific request document types, request queues, and request types; or they can be set up to cover all document types, queues, and request types. For example, when a live request (call type 1) appears in the VIP queue and you advance it to the complete status (999), you can complete the reason field (CALLRN).

This section lists a prerequisite and discusses how to set up required fields for Case Management.

3.6.1 Prerequisite

Set the Check Required Fields processing option to enable the system to verify that information exists in the required fields.

See Setting Up Processing Options for the Work With Case Program (P17500).

3.6.2 Form Used to Set Up Required Fields

Form Name	FormID	Navigation	Usage
Work With Case Required Fields	W1759B	Case Setup (G90CG), Required Fields	Define required fields.
		On the Work With Case Required Fields form, enter the table number in the File Name field and click Find.	

3.6.3 Setting Up Required Fields for Case Management

Access the Work With Case Required Fields form.

Figure 3–3   Work With Case Required Fields form
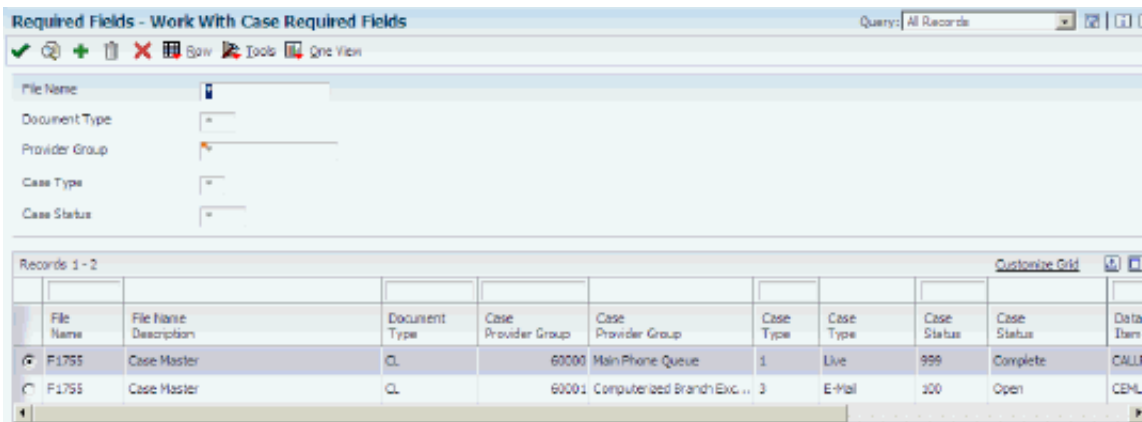
Complete the form to set up required fields for cases.

File Name
Enter the table name. Enter **F1755** to specify Case Master table, and **F1757** to specify Task Master table.

Data Item
Enter the alias. You cannot change the alias.

If you set up required fields for cases, you select data item fields from the F1755 table.

If you set up required fields for tasks, you select data item fields from the F1757 table.

3.7 Setting Up Activity Rules

Set up activity rules to define how the system processes cases.

This section provides an overview of case activity rules and discusses how to set up activity rules.

3.7.1 Understanding Case Activity Rules

You can set up activity rules for cases to define the status flow for cases and to define the next step, based on the current status. To have the system proceed to the next step, you must enter the next status in the Last Status field. If you do not include the next status, the case is considered complete. If you enter an open status code in one of the other columns, you can reopen the case.

3.7.2 Form Used to Set Up Activity Rules

Form Name	FormID	Navigation	Usage
Case Provider Group Status Revisions	W17506D	Case Setup (G90CG), Provider Group Revisions	Define activity rules for cases.
		Select Provdr Group Status (provider group status) from the Form menu on the Work With Provider Groups form.	

3.7.3 Case Activity Rules Example

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

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

3.7.4 Setting Up Activity Rules

Access the Case Provider Group Status Revisions form.

Figure 3–4   Case Provider Group Status Revisions form

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

Last Status

Enter a code that specifies the status of a case.

Next Status

Enter an active customer issue status. This is used as default status when a user activates a customer issue.

If you consider the last status that you enter to be a closed case, leave this field blank. If the Next Status field is blank, the system treats the case as closed. If you want to be able to reopen a closed case, enter the Open status in one of the Other status fields.

Protect History

Enter a code that specifies whether you can change a case that has a particular status.

Auto Update

Enter a code that specifies whether the system can update a case that has a particular status.

Time Entry

Enter a code that specifies whether the system displays a time entry form for a particular status.

Failure Analysis

Enter a code that specifies whether the system displays a failure analysis form for a particular status.

3.8 Setting Up Advanced Pricing Information for Cases

This section provides an overview of Advanced Pricing for Case Management and lists a prerequisite.

3.8.1 Understanding Advanced Pricing for Case Management

You can attach an advanced pricing adjustment schedule to a case. Setting up advanced pricing for cases enables you to price items and services by using an advanced pricing structure, and it enables you to streamline pricing setup and maintenance.

A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the

sequence that you specify in the schedule. You link customers to a price and adjustment schedule through the customer billing instructions.

When you enter a case, the system copies the schedule attached to the sold-to address into the order. You can override this schedule at the header level.

To set up advanced pricing for cases, you follow the same steps that you use to set up advanced pricing for Service Management.

3.8.2 Prerequisite

Before you can attach an adjustment schedule to a case, you must complete these tasks:

- Set up preference hierarchies.
- Set up customer service detail groups.
- Set up price adjustment definitions.
- Set up adjustment schedules.
- Set up adjustment details.

See Understanding Case Management Billing.

and

See "Setting Up the CRM Foundation System" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

4

Setting Up Provider Groups

This chapter contains the following topics:

4.1 Understanding Provider Groups and Escalation Methods

Set up provider groups to ensure that cases are assigned to the appropriate people. For example, you might set up and organize provider groups according to product lines and group consultants who are knowledgeable about each product into specific provider groups. You might also create provider groups to ensure that foreign language cases are directed to the appropriate groups.

Set up routing information to define the sequence and method by which cases are routed to the appropriate provider group.

The service and warranty management (S/WM) escalation method that you define in the S/WM System Constants program (P17001) determines how the system defines provider groups and escalates cases.

> **Note:** Setup requirements that are specific to an escalation method are noted in the applicable setup procedure.

4.1.1 Notification Escalation Method

If you decide to escalate cases using the notification method (escalation method 1 in the S/WM System Constants program), use the Distribution List Control program (P02150) to attach assignees to provider groups. Use the Queue Security program

(P01135) to specify whether groups or specific users can make changes to the distribution lists.

Through the Queue Properties program (P01133P), define which programs distribution list members view when they open their Workflow queue.

The escalation percentages you define on the Case Priority Revisions form determine how the system routes and escalates cases to distribution list members. When a case is assigned to a provider group, the system uses the values in this form to determine the escalation response time and sends notification to members on the distribution list assigned to the provider group.

4.1.2 Skill-Level Escalation Method

If you decide to escalate cases using the skill-level method (escalation method 2 in the S/WM System Constants program), you can assign members to provider groups using the Work With Provider Group Employees program (P90CG506). Through this program, you assign address book records, such as employees or contractors, to provider groups and specify a skill-level for each provider group member. You can assign any address book record to one or more provider groups, as long as the address book record has been set up as a service provider.

When cases are assigned to provider groups, the system compares the skill-levels and case loads of each provider group member and assigns cases appropriately.

The escalation percentages that you define on the Case Priority Revisions form determine when the system routes and escalates cases to provider group members.

4.2 Setting Up Provider Group User Defined Codes (UDCs)

This section provides an overview of provider group UDCs.

4.2.1 Understanding Provider Group UDCs

Before you can use any of the features of Provider Groups, you need to define information that the system uses for processing. You also need to specify the data that is used when you set up provider groups in the system. You can access these UDCs from the Case User Defined Codes menu (G90CG01).

This table describes the information that you must set up for provider groups:

UDC	Type of Data
90CG/SL	Skill Level
	Define the skill levels that the system uses for escalation when the Escalate using Skill Levels option is selected. The system starts with the provider group member with the lowest skill level and proceeds to the next highest level within the provider group when processing escalations. You can enter additional skill levels, as needed; however, you must enter integers. For example, enter 5, 6, 7, and so on, as skill levels.
17/PR	Case Priority
	Use case priorities to define and organize cases by severity level.

4.3 Setting Up Provider Groups

This section provides an overview of provider groups, lists a prerequisite, and discusses how to:

- Set up a provider group.

- Assign provider group members using skill levels.

- Assign provider group members using distribution lists.

4.3.1 Understanding Provider Groups

Provider groups are a particular search type (UDC 01/ST) in the Address Book. Use the Work With Provider Groups program to set up provider groups. When you set up a provider group, the system adds a record to the F1797 and F0101 tables.

If you escalate cases using skill levels, use the Provider Group Employees program to identify the members of each provider group and the skill level associated with each member.

If you escalate cases using distribution lists, use the Distribution List Control program to attach assignees to provider groups. When you define organizational structures, you create hierarchies of relationships between parents and children.

4.3.2 Prerequisite

All provider group members must first be set up in the Address Book and defined as service providers.

See "Setting Up Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

"Setting Up Customers and Service Providers for Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

4.3.3 Forms Used to Set Up Provider Groups

Form Name	FormID	Navigation	Usage
Provider Group Revisions	W17506B	Case Setup (G90CG), Provider Group Revisions Click the Add button on the Work With Provider Groups form.	Set up provider groups. You might need to add provider groups if the organization expands its product groups or if you decide to assign specialists to cases based on knowledge of product groups.

Form Name	FormID	Navigation	Usage
Provider Group Employees	W90CG506B	On the Work With Provider Groups form, search and select a provider group, and click Provider Grp Empl (provider group employee) from the Row menu.	Define members and associate skill levels with the provider group. **Note:** Use this form if you are escalating cases using skill levels. If you have not set the escalation constant in the S/WM System Constants program to escalate using skill level, the Provider Grp Empl option will not be available from the Row menu. Any address book record Search Type, not just employees, can be assigned to a provider group. The only requirement is that they must be set up as service providers in the Address Book. See "Setting Up Service Management, in th e*JD Edwards EnterpriseOne Applications Service Management Implementation Guide*. "Setting Up Customers and Service Providers for Service Management" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
Work With Distribution Lists	W02150A	On the Work With Provider Groups form, search and select a provider group, and click Workflow Grp Rev(workflow group revisions) from the Row menu. Alternatively, select Case Setup (G90CG), Group Revisions.	Review distribution list information. **Note:** Use this form if you are escalating cases using the notification method.
Address Parent/Child Revisions	W0150A	On the Work With Distribution Lists form, click Add.	Set up distribution lists for provider groups. **Note:** Use this form if you are escalating cases using the notification method.

4.3.4 Setting Up a Provider Group

Access the Provider Group Revisions form.

Figure 4–1   Provider Group Revisions form

4.3.4.1 Provider Group Information

Access the Provider Group Information tab.

Provider Group Number/Name

Enter an existing Address Book number.

You can either manually enter a provider group number, or you can leave the field blank and have the system assign a provider group number. The system creates an Address Book record for this new provider group with that provider group number.

Name

Enter the provider group name. This 40-character alphabetic field appears on many forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on these special characters when you use this field to search for a name.

Long Provider Group Number

Enter a value in this field to enter and locate information. If you enter a value other than the Address Book number such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the Address Book number in this field.

For example, if Address Book number 4100 (total solutions) has a long address TOTAL and an asterisk (*) distinguishes it from other entries (as defined in the Address Book constants), you might type *TOTAL into the field, and the system would return 4100.

Mail Box Designator

Enter a mailbox code from UDC 02/MB associated with the provider group that should be used on delivery of the message.

ACD Extension (automatic call distributor extension)

Enter the telephone number of the provider group. Do not enter a prefix or special characters, such as hyphens or periods. You can use any applicable telephone number format for a country. This field is used in conjunction with the Prefix field; you enter the first segment of the telephone number, which is called the area code in the U.S. When you search for an address using a phone number, you must enter the number exactly as it is set up in Oracle's JD Edwards EnterpriseOne Address Book system, including any special characters.

Work Center
Complete this field to calculate commitment date and time if you are not using entitlements. The system also uses the work center to calculate the elapsed time and the time remaining on the request.

Case Category Code 05 and Case Category Code 06
Enter the case category codes (UDCs 17/05 and 17/06) to record additional information for a provider group. You can use this information for reporting on provider groups.

Pager/E-mail Address
Enter the provider group's page or email information. This field is a text field.

4.3.4.2 Associated Addresses

Access the Associated Addresses tab.

1st Address Number, 2nd Address Number, 3rd Address Number, 4th Address Number, 5th Address Number, and 6th Address Number
Completes the address number information for a case assigned to a provider group.

Do not associate the Address Book number of consultants who receive cases for this provider group. Instead, associate consultants with the provider groups that are appropriate for reporting purposes or for workflow. To associate consultants to a provider group, include them as a member of the provider group.

4.3.5 Assigning Provider Group Members Using Skill Levels

Access the Provider Group Employees form.

Figure 4–2   Provider Group Employees form

Employee Number
Enter the Address Book number of the person whom you assign to the provider group. You can assign Address Book numbers with all search types to a provider group as long as the Address Book record has been set up as a service provider.

Skill Level

Enter the provider group member's skill level. Use a value from UDC 90CG/SL. The system uses each provider group member's skill level to assign cases and process escalations. When assigning cases, the system starts with the provider group member with the lowest skill level and then proceeds to the next skill level.

Manager

Define the manager for the provider group. You can select only one manager per provider group. To select the provider group's manager, you must click the radio button by the member and then select Set Manager. The manager of each provider group receives the past due notification and is assigned to all unresolved cases. The manager still receives past due case assignments even if the Unavailable Flag is selected.

Unavailable Flag

Select this field for members who are unavailable for case assignment; for example, when they are on vacation or out of the office. Provider group members that have the Unavailable Flag selected do not have any cases assigned to them until the field is cleared.

4.3.6 Assigning Provider Group Members Using Distribution Lists

Access the Address Parent/Child Revisions form.

Figure 4–3   Address Parent/Child Revisions form

Parent Number

Enter the parent number for the distribution list. The system uses this number to associate addresses with the parent distribution list. Any value that you enter in this field updates the F0150 table for the blank structure type. This address number must exist in the F0101 table for validation purposes.

The Address Book number of the primary level in a hierarchy, or reporting relationship. A parent in one hierarchy can be a child in another hierarchy. A hierarchy can be organized by business unit, employee, or position. For example, you can create a hierarchy that shows the reporting relationships between employees and supervisors.

Structure Type

Enter a value from UDC 01/TS that identifies a type of organizational structure that has its own hierarchy in the JD Edwards EnterpriseOne Address Book system (for example, email).

When you create a parent-child relationship for Oracle's JD Edwards EnterpriseOne Accounts Receivable system, the structure type must be blank.

The field identifies the type of distribution list, such as *WFS* for workflow, *ORG* for group, and *EML* for email. Enter **WFS** as the value.

Group

Enter the group number. When you define case priorities, the Message Level field in the Case Priorities program uses the value in this field to determine who receives messages when cases are escalated.

See Setting Up Case Priorities Using Notification Escalation Method.

Address Number

Enter a number that identifies an entry in the Address Book, such as employee, applicant, participant, customer, supplier, tenant, or location.

Remark

Enter a remark, description, name, or address. This field is a generic field.

Begin Eff Date (beginning effective date)

Enter the date on which the address number appears in the structure. The Beginning Effective Date field prevents the address number from occurring in the structure until the beginning effective date is the same as the current date.

If left blank, the address number always occurs in a structure unless there is an ending effective date.

End Eff Date (ending effective date)

Enter the date on which the Address Book record ceases to exist in the structure.

Note: Threshold values, escalation hours, and escalation minutes are not used for cases.

4.4 Setting Up Queue Security

This section provides an overview of queue security and discusses how to set up queue security.

4.4.1 Understanding Queue Security

If you are escalating cases using the notification method, you can set up the security status for a user or group of users within a workflow message queue. You can add security by user, distribution list, or both.

4.4.2 Form Used to Set Up Queue Security

Form Name	FormID	Navigation	Usage
Workflow Message Security Revisions	W01135A	Case Setup (G1743), Queue Security Click the Add button on the Work With Workflow Message Security form.	Set up queue security. **Note:** For security reasons, this form is available only in the Windows client.

4.4.3 Setting Up Queue Security

Access the Workflow Message Security Revisions form.

User

Enter a user in the workflow system. This field can also specify a group.

Group/Role

Enter a group or list of users in the workflow system; the Address Book number that identifies a list of users in the workflow system.

Authority Y/N

Enter whether the user is authorized to make changes to security information.

For workflow, this field indicates whether the user can view other queues in the Work Center.

4.5 Setting Up Queue Properties

This section provides an overview of queue properties and discusses how to set up queue properties.

4.5.1 Understanding Queue Properties

If you escalate cases using the notification method, you can set up queue properties to provide a link to an JD Edwards EnterpriseOne application if, for example, you want recipients to review information within an JD Edwards EnterpriseOne application whenever they open messages in that particular queue.

4.5.2 Forms Used to Set Up Queue Properties

Form Name	FormID	Navigation	Usage
Work With Queues	W01133PA	Case Setup (G1743), Queue Properties	Review the list of queues.
Queues Properties Revisions	W01133PB	Click the Add button on the Work With Queues form.	Set up queue properties. **Note:** For security reasons, this form is only available in Windows Client.

4.5.3 Setting Up Queue Properties

Access the Queues Property Revisions form

Queues

Enter a field that determines the mailbox associated with the queue that is used on delivery of the message.

Application

Enter the name that identifies a system object. JD Edwards EnterpriseOne architecture is object-based. Discrete software objects are the building blocks for all applications, and developers can reuse the objects in multiple applications. The object librarian tracks each object. Examples of system objects include:

Batch applications (such as reports).

Interactive applications.

Business views.

Business functions.

Business function data structures.

Event rules.

Media object data structures.

Form Name
Enter a unique name that identifies a form.

Version
Enter a specific set of data selection and sequencing settings for the application. Versions can be names using any combination of alphanumeric characters. Versions that begin with XJDE or ZJDE are delivered with the JD Edwards EnterpriseOne system.

4.6 Setting Up Routing Information

When you set up routing information, you can direct cases to provider groups in the order that you determine as the most logical.

This section provides and overview of routing sequences and rules and discusses how to set up:

- Routing sequence
- Routing rules

4.6.1 Understanding Routing Sequences and Rules

Use routing sequence to manage the order that a case is routed to provider groups. Use routing sequence to define how the system searches through the routing rules to determine the provider group to which an incoming case is directed.

Use routing rules to define the prescribed path for assigning cases to the proper provider groups. You might assign cases to certain provider groups or individuals bases on their knowledge of a product family or language.

Through the Routing Rules form, you can assign cases to a provider group or person based on any of the following or any combination of the following information:

- Customer Address Book number.
- Call center location.
- Product model.
- Product family.
- Environment.
- Address Book language code.
- Address Book geographic region code.

You can define the call center location in the Address Book for the service provider, the person entering the case. In the Address Book Revisions form, access the Address Book record for the service provider and enter the call center location in the Business Unit field.

See "Setting Up Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

"Setting Up Customers and Service Providers for Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

4.6.2 Forms Used to Set Up Routing Information

Form Name	FormID	Navigation	Usage
Case Provider Group Routing Rules Sequence	W17506H	Case Setup (G90CG), Provider Group Revisions On the Work With Provider Groups form, select Routing Sequence from the Form menu.	Define the order that the system uses to search for a match between the case and routing rules. The system uses a hierarchical search method, from most specific to most general. Record a number in the Sequence Number field and then enter **Y** in the fields that the system includes in the hierarchical search.
Case Provider Group Routing Rules Revisions	W17506G	On the Work With Provider Groups form, select Routing Rules from the Form menu.	Set up routing rules to direct cases to the proper provider groups. Specify either a person (assignee) or a provider group and then use any of the other active fields such as Product Model, Product Family, Environment, and so on, to determine the routing rule.

4.6.3 Setting Up Routing Sequence

Access the Case Provider Group Routing Rules Sequence form.

Figure 4–4   Case Provider Group Routing Rules Sequence form

4.6.4 Setting Up Routing Rules

Access the Case Provider Group Routing Rules Revisions form.

Figure 4–5 Case Provider Group Routing Rules Revisions form (1 of 2)

Figure 4–6 Case Provider Group Routing Rules Revisions form (2 of 2)

Case Provider Group
Enter the Address Book number of the provider group if you are entering routing rules for provider groups.

Assignee Number
Enter the Address Book number of the assignee if you are entering routing rules for an assignee.

Product Model
Enter a value from UDC 17/PM that classifies an inventory item into a model.

Product Family
Enter a value from UDC 17/PA that classifies an inventory item into a group.

Environment
Enter a value from UDC 17/EN to define the operating environment of the user.

Language
Enter a value from UDC 01/LP that specifies the language.

Before specifying a language, a language code must exist at either the system level or in the user preferences.

Geographic
Enter a value from UDC 17/GR to specify the geographic region of the customer.

4.7 Setting Up Case Types

Set up case types to organize cases and then assign specific case types to provider groups.

This section provides an overview of case types and discusses how to set up generic and provider-group-specific case types.

4.7.1 Understanding Case Types

You can set up various case types, depending on how the organization receives cases. The types of cases might include:

- Facsimile

- Live telephone call

- Returned phone call

- Email

Set up generic case types to apply to all provider groups. You can then define specific case types for each provider group, as needed.

If you do not set up specific case types for a provider group, the values associated with the generic version of the case type are associated by default with the provider group.

You use the same form to set up generic and provider group-specific case types; however, the navigation to the form is different.

4.7.2 Forms Used to Set Up Case Types

Form Name	FormID	Navigation	Usage
Case Type Revisions	W17506C	Case Setup (G90CG), Provider Group Revisions On the Work With Provider Groups form, select Provider Group Type from the Form menu.	For generic case types, define the default Case Type from UDC 17/CT, Default Case Sourcefrom UDC 17/SC, and Resp Time (response time) for all provider groups.
Case Type Revisions	W17506C	On the Work With Provider Groups form, select the provider group and select Prdr Grp Types (provider group types) from the Row menu.	For provider group-specific case types, define the default case type from UDC 17/CT, Default Case Source from UDC 17/SC, and Resp Time (response time) for the selected provider group. **Note:** To define a case type, you must first create the case type value in the UDC 17/CT table.

4.7.3 Setting Up Generic and Provider-Group-Specific Case Types

Access the Case Type Revisions form.

Figure 4–7   Case Type Revisions form

Provider Group Number
For generic case types, this field is blank.

For provider-group-specific case types, the provider group number appears by default.

Case Type
Enter a value from UDC 17/CT to specify the type of case.

Default Case Source
Enter a value from UDC 17/SC to specify the source of a case.

Resp Time (response time)
Enter a response time to define a guaranteed length of time when a consultant must respond to a case. This guaranteed response time is a component that is used to calculate commitment date and time, and escalation date and time if the case is not covered under a contract. This unit of time relates to the service type in the F1725 table. Enter the response time in hours.

Note: If a contract covers a case, then the contract response time overrides the response time on the Case Request Types Revisions form.

4.8 Setting Up Case Priorities Using Notification Escalation Method

This section provides an overview of priorities and escalations, and discusses how to set up generic and provider-group-specific priorities.

4.8.1 Understanding Priorities and Escalations

The escalation method that is defined in the S/WM system constants determines how you can set up case priorities in the system. For both escalation methods, you use the Work With Case Priorities form to define how the system escalates cases; however, the form contains different fields, and the form numbers are different.

Each time that the system escalates a case, it uses the detail data from the Case Priority Revisions form to calculate:

- New escalation date and time.

- Message level within the parent distribution list for sending messages.

- Priority.

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

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

You must define a generic priority that applies to all provider groups. You can specify an escalation process for each case priority (UDC 17/PR).

After you set up generic priorities, you can then set up priority values for each provider group. If a provider group does not have specific values assigned, the generic values apply by default.

You use the same form to set up generic and provider-group-specific priorities; however, the navigation to the form is different.

4.8.2 Forms Used to Set Up Priorities

Form Name	FormID	Navigation	Usage
Work With Case Priorities	W17506J	On the Work With Provider Groups form, select Prdr Grp Priorities (provider group priorities) from the Form menu.	Review generic case priorities and commitment percentages. These values apply by default for all provider groups.
Case Priority Revisions	W17506I	On the Work With Case Priorities form. click Add.	Define the generic case priorities that are the default values for all provider groups. When you set priorities, the system updates the F1753 table.
Work With Case Priorities	W17506J	On the Work With Provider Groups form, select a provider group and select Prdr Grp Priorities (provider group priorities) from the Row menu.	Review the specific case priorities and commitment percentages that apply to the provider group.

Form Name	FormID	Navigation	Usage
Case Priority Revisions	W17506I	On the Work With Case Priorities form, select the provider group and click Add.	Define the case priorities for the provider group. When you set priorities, the system updates the F1753 table.
			You can set up as many escalation levels as necessary. The system sends escalation messages until the issue is closed or until no more escalation levels exist.

4.8.3 Setting Up Generic and Provider-Group-Specific Priorities

Access the Case Priority Revisions form.

Provider Group
For generic priorities, this field is blank.

For provider-group-specific priorities, the provider group number appears by default.

Priority
Enter the level of severity pertaining to the customer issue.

Commit Percentage
Enter the percentage to use when calculating the escalation due time. The commit time is based on the case type. When a case is not covered under a contract, the system uses the value in this field to calculate escalation time.

Escalation Time = Current Time + (Commit Time × Percentage)

Escalation Level
Enter the status code used to track commitment to the customer or an escalation. The escalation level is derived from a case and must be greater than or equal to 1.

Message Level
Enter the message level. The message level is associated with the group number on the Address Parent/Child Revisions form and enables the system to determine who receives messages when the case is escalated.

Unassigned Percentage and Assigned Percentage
Enter the percentage to use when calculating the escalation due time.

Escalation Time = Current Time + (Commit Time × Percentage)

The commit time is based on the type of case. The percentage is based on the request priority and whether the request is assigned to an individual.

The system uses the unassigned percentage to calculate escalation date and time for unassigned cases. The formula is Escalation Date and Time = Commitment Date/Time × Unassigned Percentage.

> **Note:** For Assigned Percentage, the values in the percentage field can be over 100 percent because you can send escalation messages after the commit time has been reached.

Escalation Priority
Enter a value from UDC 17/PR to specify the escalation priority.

4.9 Setting Up Priorities Using Skill-Level Escalation Method

This section provides an overview of priorities and escalations, and discusses how to set up generic and provider-group-specific priorities.

4.9.1 Understanding Priorities and Escalations

The escalation method defined in the S/WM system constants determines how you can set up case priorities in the system. For both escalation methods, you use the Work With Case Priorities form to define how the system escalates cases; however, the form contains different fields, and the form numbers are different.

Using the values in the F1753 table, the system assigns and processes the case through the provider group members assigned to the case. The values in this table enable the system to determine how long a provider group member works on a case before the case is systematically escalated to the next highest level member of the provider group.

You must define a generic priority that applies to all provider groups. After you set up generic priorities, you can then set up priority values for each provider group. If a provider group does not have specific values assigned, the generic values apply by default.

You use the same form to set up generic and provider group-specific priorities; however, the navigation to the form is different.

4.9.2 Forms Used to Set Up Priorities

Form Name	FormID	Navigation	Usage
Work With Case Priorities	W17506J	On the Work With Provider Groups form, select Prdr Grp Priorities (provider group priorities) from the Form menu.	Review generic case priorities and commitment percentages. These values apply by default to all provider groups.
Case Priority Revisions	W17506E	On the Work With Case Priorities form, click Add.	Define the generic case priorities that are the default values for all provider groups. When you set priorities, the system updates the F1753 table.
Work With Case Priorities	W17506J	On the Work With Provider Groups form, select a provider group and select Prdr Grp Priorities (provider group priorities) from the Row menu.	Review the specific priorities and their associated commitment percentages that are specified for the selected provider group.

Form Name	FormID	Navigation	Usage
Case Priority Revisions	W17506E	On the Work With Case Priority form, click Add.	Define the case priority details for the provider group. When you create the priority and its details, the system updates the F1753 table. You can set up as many escalation levels as necessary. The system sends escalation messages until the issue is closed or until the case has been escalated to the highest skill level. If the case is still not closed a message is sent to the manager.

4.9.3 Setting Up Generic and Provider Group-Specific Priorities

Access the Case Priority Revisions form.

Figure 4–8   Case Priority Revisions form

Provider Group
For generic priorities, this field is blank.

For provider-group-specific priorities, the provider group number appears by default.

Issue Priority
Enter a value from UDC 17/PR to specify the issue priority.

Commit Percent
Enter the percentage to use when calculating the escalation due time. The commit time is based on the case type. When a case is not covered under a contract, the system uses the value in this field to calculate escalation time.

Escalation Time = Current Time + (Commit Time × Percentage)

Escalation Percentage
Enter the percent of the total response time scheduled to elapse between each of the case's escalation intervals. An escalation interval is the time that lapses between the

case's assignment to a provider group member and the case's escalation to the provider group member with the next highest skill level.

For example, if you enter **25** in this field and the response time for the case is 4 hours, the first skill level assigned to this case will have the case for one hour and each skill level thereafter will have the case for 1 hour until the response time is depleted.

Escalation Warning Percentage
Enter the percent of the current escalation interval that remains when the assignee is warned about an upcoming escalation to another provider group member.

For example, if you enter **25** in this field and the provider group member has the case for an hour, the system generates and delivers a warning message 15 minutes before the case is escalated to the next skill level.

Resolution Warning Percentage
Enter the percentage of the entire escalation routine that remains when the current assignee is warned about an upcoming escalation to the provider group manager.

For example, if you enter **10** in this field and the response time is 4 hours (240 minutes), the assignee working on the case when 24 minutes remain receives a warning message.

Escalation Start Percentage
Specify the percent of the response time assumed to have already lapsed or expired before the first escalation interval begins

For example, if you enter **10** in this field and the response time is 4 hours (240 minutes) the first provider group member assigned to the case will be assigned as soon as the case is created and saved, but the complete escalation interval will not begin until 24 minutes have elapsed.

4.10 Setting Up Processing Options for the Work With Provider Groups Program (P17506)

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

4.10.1 Versions

The processing option on this tab defines the version that the system uses when it calls this program:

1. Address Book MBF (10100041) Version (address book master business function (10100041) version)
If you leave this processing option blank, the system uses the ZJDE0001 default version.

4.10.2 Default

The processing option on this tab defines the default values that the system uses when you work with provider groups.

1. Document Type
Specify the default document type for provider group revisions. **CL** (call) is the default. Change the default as needed.

4.10.3 Display

The processing options on this tab indicate the information that the system displays when you inquire on provider groups using this version of the Work With Provider Groups program.

1. Display Case Provider Groups or Work Order Provider Groups
Specify which provider group the system displays. Values are:

Blank: Work order provider groups.

1: Case provider groups.

5

Understanding Case Management Billing

This chapter contains the following topics:

- Section 5.1, "Understanding Billing in Case Management"
- Section 5.2, "Understanding Pricing Methods"
- Section 5.3, "Understanding Multicurrency in Case Management Billing"
- Section 5.4, "Understanding Case Management Automatic Accounting Instructions (AAIs)"

> **Note:** This chapter is required if you bill for cases. You must complete the tasks discussed in this chapter to implement case billing.

5.1 Understanding Billing in Case Management

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

JD Edwards EnterpriseOne Case Management is integrated with Oracle's JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne General Accounting systems. The billing process in Oracle's JD Edwards EnterpriseOne Service and Support Management is the same whether you are billing for contracts, service work orders, or cases. After you set up the billing details in Service or Support Management, the system runs the billing process, updates Accounts Receivable tables with invoice information, and updates General Accounting tables with revenue information.

Invoices are based on billable cases. The first step in the billing process is to accumulate billable cases. When you run the Case Workfile Generation report (R17675), the system finds the cases that are eligible for billing from the F1755 table and the F1760 table, and creates F4812 records.

See Also:

- "Understanding the JD Edwards EnterpriseOne Service Management Features", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.
- "Additional Features", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- "Billing for Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

5.1.1 Prerequisite

Set up the distribution AAIs.

5.2 Understanding Pricing Methods

To enter billing information for a case, you can select one of these pricing methods:

- Flat rate

- Time and materials

For the flat rate method, define billing through the processing options for the Case Update program. You can specify the cost type, pricing unit, and pricing unit of measure.

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

- F06116Z1

- F0911Z1

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

> **See Also:**
>
> - Setting Up Processing Options for Case Management.

5.3 Understanding Multicurrency in Case Management Billing

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

- If you do not activate multicurrency, the system does not display currency information fields on the billing information forms.

- If the currency code for the customer is the same as the base currency code (the currency code for the company), the Foreign option is disabled.

- The system retrieves the customer currency code from the customer number in the F03012 table.

  If a currency code does not exist for this customer, the system retrieves the currency code from the company.

- The system retrieves the company number from the F0006 table.

  If the value in the Company field is blank, the system uses company 0000. Then the system retrieves the base currency code from the F0010 table.

- The system uses the exchange rate, which you can override, to calculate the domestic amount.

- The currency fields are disabled if the case or time entry records have been billed.

- If you select the Foreign option, the system displays billable amounts in the customer's currency.

  Otherwise, billable amounts appear in the company's currency.

5.4 Understanding Case Management Automatic Accounting Instructions (AAIs)

To bill cases and process business transactions properly, you must identify information about the account structure and specific account values. You define the account structure and specific account values by using AAIs. The system stores the AAI values in the F4095 table. Whenever a program performs an accounting function, it accesses this table.

Distribution AAIs define the rules that the JD Edwards EnterpriseOne Case Management system uses to interact with the general ledger. Accounting AAIs define the rules that the JD Edwards EnterpriseOne Case Management and the JD Edwards EnterpriseOne Accounts Receivable systems use to interact. When you define AAIs, you establish how the system processes transactions for various programs.

Case-related distribution consist of these AAIs :

- Calls Revenue (1747).

  This AAI determines the credit account for billable cases. Accounting AAIs determine the debit side of revenue, also known as the trade accounts receivable account.

- Call Center Expense (1792).

  This AAI determines the debit account for case time entry records that the system uploads to the F0911Z1 table or the F05116Z1 table.

- Accrual Call Center Cost (1793).

  This AAI determines the credit account of costs for case time entry records that the system uploads to the F0911Z1 table.

Based on key fields, the system retrieves the General Ledger account to use when creating an entry in the F4812 table. The key fields are:

- Company.

- Doc Type (document type).

- G/L Category Code (general ledger category code).

- Cost Type.

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

- Branch/plant

- Object account

- Subsidiary

5.4.1 Hierarchy for General Ledger Class Codes for Cases

Based on the service type of the case, the system finds the Covered G/L Code (covered general ledger code) or the Non-Covered G/L Code (non-covered general ledger code) in the F1725 table. The system uses these general ledger (GL) codes to locate the appropriate distribution AAIs for amounts that are either covered or not covered by service contracts.

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

5.4.2 Hierarchy for Responsible Business Unit for Cases

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

On the S/WM Constants form, you can select one of these tables for the system to use to locate the responsible business unit:

Inventory (F4117/F41171)
Select this table for the system to use the branch/plant and item number on the case to find the responsible business unit in the F41171 table.

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

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

Prod Family/Model (F1791) (product family/model (F1791))
Select this table for the system to use the product model on the case detail line to find the responsible business unit in the F1790 table.

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

Equipment (F1201)
Select this table for the system to use the equipment number on the case detail line to find the responsible business unit in the F1201 table.

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

Customer Number (F0101)
Select this table for the system to use the customer number on the case detail line to find the responsible business unit in the F0101 table.

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

S&WM Line Type (F1793) (service and warranty management line type (F1793))
Select this table for the system to use the customer number on the case detail line to find the responsible business unit in the F1793 table.

If the business unit for the customer exists in the F1793 table, the system uses the same business unit in the resulting accounting journal entry.

S&WM Customer Number (F1797) (service and warranty management customer number (F1797))
Select this table for the system to use the customer number on the case detail line to find the responsible business unit in the F1797 table.

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

> **Note:** If you assign a project business unit to the responsible business unit in the F0006 table, the system uses the project business unit as the business unit for the account.

6

Setting Up and Managing Scripts

This chapter contains the following topics:

6.1 Understanding Scripting

A script is a predefined set of questions or statements that are joined together in a specific order and used to gather information from respondents. When the script is processed, which is known as runtime, a questioner follows the script and records the respondent's answers. Depending on the purpose of the script, the system can use the respondent's answers to score the script.

Before you can create a script, you must define its components in the proper sequence. Script components include:

- Answer sets

- Variables

- Tokens

- Rate sets

- Questions

You do not necessarily use all components in every script; you use only the components that support the features that you want to include in the script. For example, you might choose not to use variables and tokens in a script.

After you have created script components, you can create scripts. Scripts can be either branch scripts, which use conditional logic to determine a sequence of questions, or linear scripts, which contain a fixed set of questions in a fixed order.

In a branch script, a script tree shows hierarchical relationships among questions. Questions are parents of answers, which are in turn parents of follow-up questions. Sibling nodes on the tree represent mutually exclusive paths through the script, so the questions that are asked depend on the answers that are provided.

In a linear script, the script tree hierarchy is flat. Questions are parents of answers, but answers have no children. Instead, all questions appear at the same hierarchical level. All questions are asked, and no branching logic is used. This diagram illustrates the difference between a branch script and a linear script:

Figure 6–1   Example of a linear and branch script
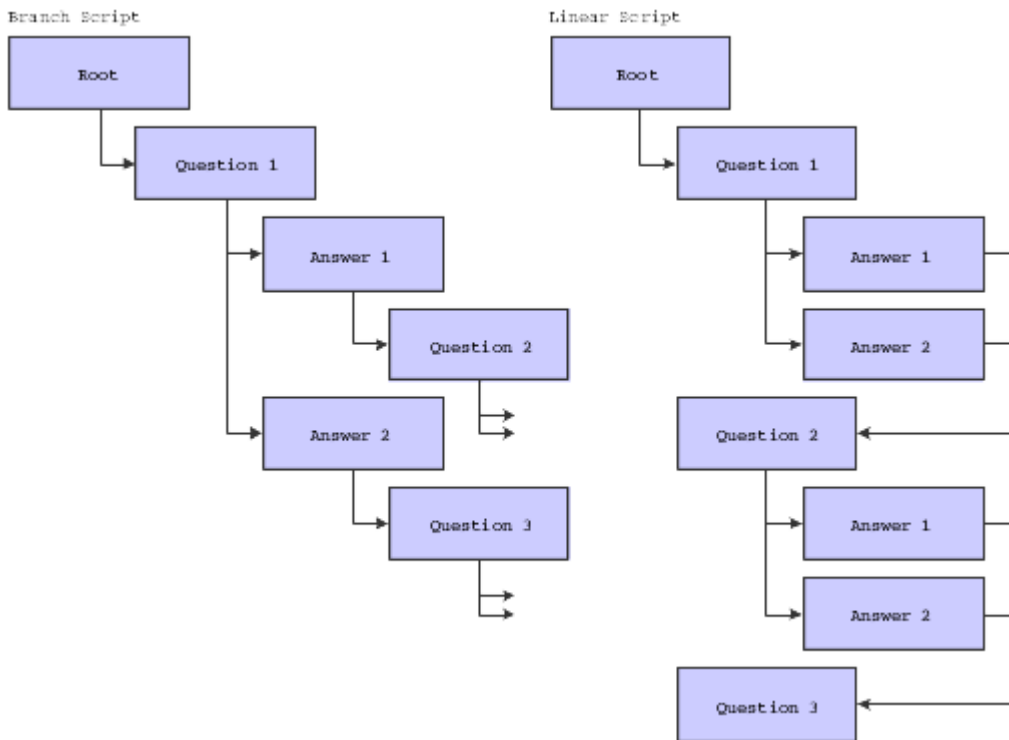
After you create scripts, you can validate them to verify that you have set them up correctly. When you validate a script, the system compares the script against one or more of three predefined rules to determine whether all nodes in the script tree are valid.

After have created a valid script, you can clone the script. You might find this feature useful if you want to create several similar scripts. Using the cloning feature, you can create one script and clone it as many times as necessary. You can then change the cloned scripts so that they contain the information that is specific to that version of the script.

You can also translate scripts into multiple languages. You might find this feature useful if customer service representatives are working with the same issues in different countries. Using the translation feature, you can create one script and translate it into multiple languages, rather than creating multiple scripts to support each necessary language.

After you have created valid scripts, you can use them to solve work order or case-related issues. You can access scripts directly from work order and case entry forms, or by using Solution Advisor. When you find scripts that pertain to the issue that you are trying to resolve, you can attach an instance of each relevant script to the work order or case. When you attach a script instance to a work order or a case, you can run the script immediately; save the script to run in the future; or run a portion of the script, save the answers that are received from the respondent, and complete the script at a later time.

6.2 Creating Script Components

This section provides an overview of script components and discusses how to:

■   Create answer sets.

- Attach answers to answer sets.

- Translate answers.

- Create variables.

- Create tokens.

- Create rate sets.

- Create questions.

- Translate questions.

6.2.1 Understanding Script Components

Before you can create a script, you must create the components, or building blocks, that you will use in the script. Script components include:

- Answer sets

- Variables

- Tokens

- Rate sets

- Questions

It is not necessary to create all components for each script. You can choose the components that you want to include in a script based on the purpose for the script. However, at a minimum, a script must contain answer sets and questions.

The components must also be set up in the correct sequence. You must create an answer set before you can create a question. You must also create a variable before you can create a token. This sequence is recommended when creating script components:

1. Answer sets (required)

   An answer set must exist before you can create a single or multiple select question. When you create one of these types of questions, you must attach valid answers from an existing answer set.

2. Variables

   Creating variables is optional. If you create variables, you must also create tokens; however, the variable must exist before you can create the token.

3. Tokens

   Creating tokens is optional, unless you create variables. You must create tokens if you create variables.

4. Rate sets

   Creating rate sets is optional. You create rate sets if you want to score the script each time it is processed. If you choose to create a rate set for a script, you can assign values to both the questions and answers that are associated with a script. The script is then scored, based on these values, and the score is compared to the rate set to determine the meaning of the score. You assign values to questions and answers when you create the questions; therefore, it is not necessary to create rate sets before you create answer sets. However, you must create the rate set before you create the questions.

5. Questions (required)

Regardless of which components you choose to include in the script, you must include questions. When you create questions, you attach valid answers for the question from existing answer sets. You can also use variables, tokens, and rate sets when creating a question.

6.2.1.1 Answers and Answer Sets

The first step in building a script is to create answer sets. Answer sets are groups of valid answers that you can associate with questions. You use the Answer Set program (P90CF030) to create answer sets. To create a valid answer set, you first create the answer set header, and then you can attach answers to the answer set. When you create an answer set, the system creates records in these tables:

- F90CF030

- F90CF040

For example, you might create an answer set called **Favorite Color,** and add these answers to the set:

- **Red**

- **Blue**

- **Green**

- **Yellow**

You can then use this answer set when building a script. For example, if you insert a question into the script, such as **What is your favorite color?**, you can attach any or all of the answers from the **Favorite Color** answer set to the question. When a user runs the script, the user asks the respondent what the respondent's favorite color is and chooses an answer from the answer set.

You can create default answers for an answer set. You might choose to do this if most respondents answer a question with the same answer. By setting an answer as the default, the system automatically selects this answer when the script is processed. Therefore, the user does not have to select this answer before continuing to the next question. However, the user can choose any of the other valid answers for the question before continuing to the next question. Using default answers can help minimize the number of mouse clicks a user must make when running a script. You can have only one default answer in an answer set.

You can also disable answers in an answer set. For example, if the answer set is a list of current products that the service department supports, and one of the existing products is no longer supported, you can disable the answer that corresponds to the product that is no longer supported.

You can also translate each answer in an answer set into multiple languages. If the organization deals with multilingual clients, prospects, or respondents, translating answers enables you to create one set of answers, and translate it into all necessary languages. When a user runs a script, they select the language in which they want the script to appear. If the answer is available in the selected language, the user sees the translated answer. If the answer is not available in the selected language, the system displays the answer in the language in which it was originally created.

When you translate answers, the system creates records in the F90CF03A table.

Lastly, you can assign a score to each answer. If you use a scoring system when you run scripts, you assign each answer a score. The system then calculates the total score of the script, based on the respondent's answers to all of the questions, and compares the total score to the value in the corresponding rate set.

For example, you might create a script that customer service representatives use when they receive a call. The questions and answers in the script are scored and used to determine the priority of the call. One of the questions might be to ask respondents how long they have been having the problem or issue. The answer set might include these answers and corresponding scores:

Time to Resolve (Answer)	Score
One day or less.	100
One week or less.	75
One month or less.	50
More than a month.	25

When the respondent chooses an answer, the system uses the score that is associated with the answer to calculate an overall score for the question. In this example, the answers with the shortest amount of time are given higher scores. The assumption is that if a problem has existed for a long period of time before the respondent places a call, it is not as critical as a problem that is reported at the time it occurs.

To calculate the script score, the system then adds the scores for each question in the script together. The script score is then compared to the rate set that is associated with the script to determine the meaning of the score.

6.2.1.2 Variables and Tokens

Variables and tokens are used to customize scripts based on respondents' answers. Variables and tokens enable you to replace generic values with values that are specific to the respondent. If you choose to use variables and tokens, you must use both of them. You cannot use variables without tokens, or tokens without variables.

You use the Variables program (P90CF080) to create variables and the Tokens program (P90CF070) to create tokens. The system updates these tables when you create variables and tokens:

- F90CF080

- F90CF070

If you choose to use variables and tokens, you must first create a variable. For example, you might choose to create the variable **Favorite Color.** You then create a token, which you might also name **Favorite Color.** You then associate the variable with the token.

After you have created the variable and token, you can then use them when creating questions. For example, you can associate the **Favorite Color** variable with the question: **What is your favorite color?** The answer that the respondent gives is then considered the value of the variable when the script is run. You can then use the **Favorite Color** token in subsequent questions to personalize the script for the respondent. For example, you might create the next question in the script as follows, using the **Favorite Color** token:

Would you be interested in purchasing {Favorite Color} widgets?

When a user runs the script, the token in the preceding question is replaced with the value that is associated with the **Favorite Color** variable. For example, if the respondent chose red as the favorite color, the preceding question appears as follows when the script is run:

Would you be interested in purchasing red widgets?

6.2.1.3 Rate Sets

Rate sets are used to provide meaning and context to a script score. When you create a script, you can assign values to the questions and answers in that script. As the respondent answers the questions in the script, the system scores the script based on those assigned values.

You use the Rate Set program (P90CF140) to create a rate set. When you create a rate set, the system creates records in these tables:

■   F90CF140

■   F90CF14A

To understand what the final script score means, you associate a rate set with the script. For example, you might create a script to determine the priority of an incoming call to the support department. When you create the script, you assign values to each question and answer in the script. As the representative completes the script, the system calculates the score using a numeric value. The system then compares the numeric score to the associated rate set to determine what the score means. This rate set might be used for this call priority script:

Script Score	Rate Set Value	Rate Set Score
40 or higher	Critical	40
25 to 39.9999	High	25
10 to 24.9999	Medium	10
0 to 9.999	Low	0

Therefore, if the final score for the script was 28, the system displays **High** next to the script score when the script is completed.

6.2.1.4 Questions

The last step in creating script components is to create script questions. You use the Question program (P90CF060) to create script questions. When you create questions, the system creates records in the F90CF060 table.

You can create these types of questions:

■   Single select

  The respondent can choose only one answer to this question. This question has a list of valid answers which are associated with an answer set. An example of a single select question might be **Are you calling about an existing issue?** Valid answers are **Yes** or **No,** and the user can choose only one.

■   Multiple select

  The respondent can choose one or more answers to this question. This question has a list of valid answers that are associated with an answer set. An example of a multiple select question might be **What are your three favorite colors?** Valid answers include a list of different colors, from which the respondent can choose three.

■   Value input

  The user can enter free-form text as the answer to the question. This question is not associated with a list of answers from an answer set. An example of a value input question might be **What is your address?** The user can enter the

respondent's address as the answer to the question. You cannot assign scores to value input questions.

- Guide information

  Guide information questions are statements that the user sees, and they do not require any answers. You might insert guide information questions periodically in a script to provide the respondent with information. An example of a guide information question might be **Thank you for this information. We're about half way through the survey now.** These questions are not associated with a list of answers from an answer set, and you cannot assign scores to them.

After you select the type of question, you can then enter the question and additional information about the question. You can provide a question hint, which helps users to understand the context in which a question should be asked or helps them determine the type of information that they are trying to receive from the respondent. For example, for the question **What is your address?,** you might include a hint that instructs users to gather the full address, including city, state, and zip code, so that they do not move on to the next question before gathering all of the necessary information.

You then associate the question, if it is a single or multiple select, with an answer set. When you build the script and insert the question, you can specify which answers in the answer set are available for this question in this script. The ability to select specified answers from an answer set enables you to create fewer answers sets. For example, you might create one answer set called **Colors.** This answer set can be used for any question where a respondent must choose a color, even if each question has a different set of valid colors to choose from. When you build the script, you can choose from the answer set only the colors that are associated with the current question.

You can also associate a variable with a question, or insert a token in the question or question hint text. If you associate a variable with a question, the answer to the question is used as the value for that variable. That value is then used to replace the associated token in subsequent questions. For example, you might create the question **What is your favorite color?** and associate that question with the **Favorite Color** variable. If the respondent selects **red** as the answer, any subsequent questions that have the **Favorite Color** token display the word **Red** in place of the token. For example, if the next question is **Would you be interested in purchasing {Favorite Color token} widgets?,** the system displays the question as follows, replacing the token with the variable value:

Would you be interested in purchasing red widgets?

To insert a token into a question, you click the Display Token link to display a list of available tokens. The tokens are displayed in alphabetical order. You can copy and paste the token from the Display Token area of the form into the question text.

Lastly, you can translate questions into multiple languages. If the organization deals with multilingual clients, prospects, or respondents, translating questions enables you to create one set of answers, and translate it into all necessary languages. When users run a script, they select the language in which they want the script to appear. If the question is available in the selected language, the user sees the translated question. If the question is not available in the selected language, the system displays the question in the language in which it was originally created.

When you translate a question, the system creates a record in the F90CF06A table.

6.2.1.5 User Defined Codes for Scripting

Before you begin creating scripts, you should familiarize yourself with the user defined code (UDC) tables that are used by the Branch Scripting system. Though many of these UDC tables can be changed to accommodate organizational requirements, these UDC tables contain values that are critical to the Branch Scripting system and should not be modified:

- 90CF/AS — Answer Set.

- 90CF/IS — Script Instance Status.

- 90CF/QT — Question Type.

- 90CF/SC — Script Category.

- 90CF/ST — Status.

- 90CF/VT — Variable Type.

6.2.2 Forms Used to Create Script Components

Form Name	FormID	Navigation	Usage
Search for Answer Sets	W90CF030A	Scripting Setup (G90CF), Answer Set Definition	Select existing answer sets, or access forms to create new answer sets.
Add Answer Set	W90CF030C	Click Add on the Search for Answer Set form.	Create an answer set.
Answer Set - Manage {Answer Set Name}	W90CF030D	Click Save and Continue after creating the answer set header.	Attach answers to an answer set, and translate answers.
Search for Variables	W90CF080A	Scripting Setup (G90CF), Variable Setup	Review existing variables, or access forms to create new variables.
Add Variable	W90CF080B	Click Add on the Search for Variables form.	Create a variable.
Search for Tokens	W90CF070C	Scripting Setup (G90CF), Token Setup	Review existing tokens, or access forms to create new tokens.
Add Token	W90CF070B	Click Add on the Search for Tokens form.	Create a token.
Search for Rate Set	W90CF140B	Scripting Setup (G90CF), Rate Set Definition	Review existing rate sets, or access forms to create new rate sets.
Add Rate Set	W90CF140C	Click Add on the Search for Rate Sets form.	Create a rate set.
Search for Questions	W90CF060A	Scripting Setup (G90CF), Question Definition	Select existing questions, or access forms to create new questions.
Add Question	W90CF060B	Click Add on the Search for Questions form.	Create a question.
Question - Manage {Question Name}	W90CF060C	Select a question on the Search for Questions form.	Translate questions.

6.2.3 Creating Answer Sets

Access the Add Answer Set form.

Figure 6–2   Add Answer Set form

After you create the answer set, click Save and Continue, and then proceed to the next
task to attach answers to the answer set.

Answer Set ID
Review this field after you save the answer set to see the unique identification number
that the system assigns to the answer set using Next Number functionality.

Inactive
Select this option to make the answer set inactive. If you select this option, the answer
set will not be available for use for any questions that you create after you select this
option and save the answer set. However, selecting this option does not affect
questions that already use the answer set.

6.2.4 Attaching Answers to Answer Sets

Access the Answer Set - Manage {Answer Set Name} form, Answer Set tab. Click the
Detail link.

Figure 6–3   Answer Set - Manage {Answer Set Name} form: Answer Set tab: Detail link
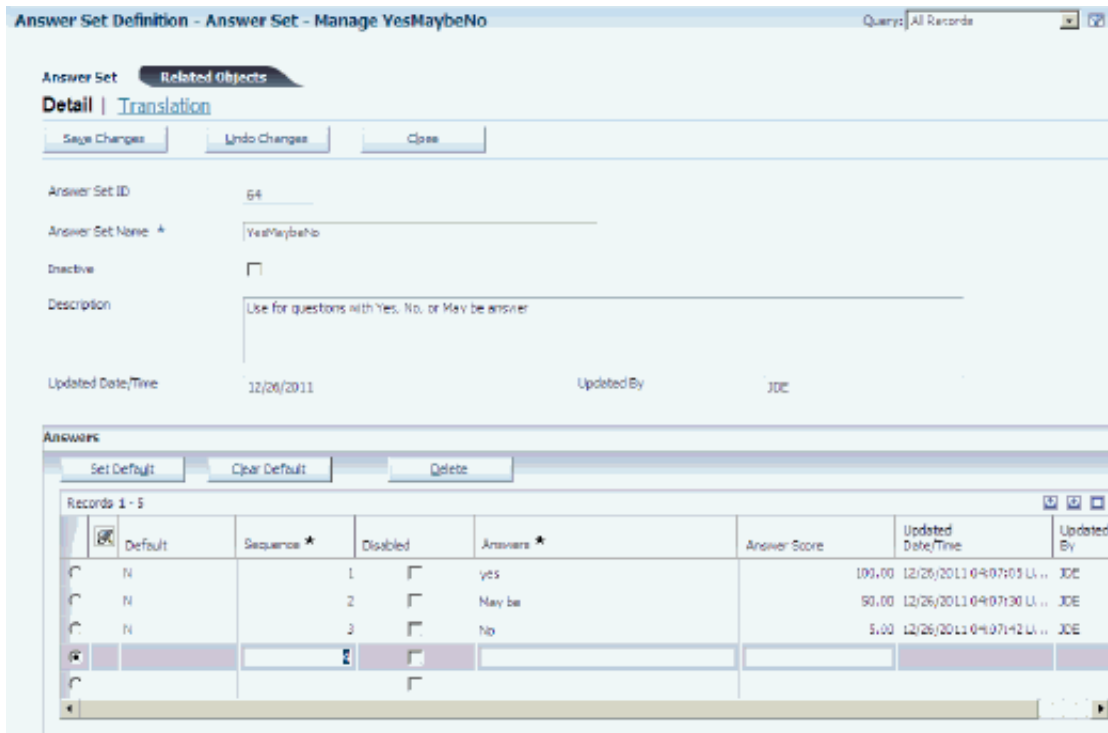
Set Default

Select an answer and then click this button to mark the answer as the default answer for the answer set. You can have only one default answer per answer set.

Clear Default

Select an answer that is currently marked as the default answer, and then click this button to clear the default option from the answer. It is not necessary to clear the default before changing the default answer. When you select an answer and click the Set Default button, the system automatically clears the default setting from the existing default and sets the new answer as the default. Use this option to clear the default if you no longer want the answer set to have a default answer.

Disable

Select this option if you no longer want this answer to be available to users when building scripts. When you select this option, this answer is no longer displayed as a valid answer during script creation. However, the system continues to display the answer for scripts that currently include this answer. To stop the answer from appearing in any scripts, you must remove the answer from each script that currently uses the answer. You can view a list of questions that currently use the answer set on the Related Objects tab.

Answer Score

Enter the numeric value that the system uses to calculate the score for the corresponding question. The system:

Totals the question weight value of each question in a script, and then divides the total by the number of questions that have a question weight in the script to determine the question percentage for each question.

Multiplies the question percentage by the answer score of the selected answer to determine the score for the question.

Totals the score for each question in the script to determine the script score.

Compares the script score to the rate set that is associated with the script to determine the meaning of the script score.

6.2.5 Translating Answers

Access the Answer Set - Manage {Answer Set Name} form, Answer Set tab. Click the Translation link.

Figure 6–4   Answer Set - Manage {Answer Set Name} form: Answer Set tab: Translation link

Language
Select the language into which you want to translate the answer.

Answer Value
Select the answer from the answer set that you want to translate.

Translated Answer Value
Enter the translated text of the answer.

Save Changes
Click this button to save the translated answer. The system creates a record in the detail area that lists the answer, language, and translated value. You can then edit or delete the record if necessary.

6.2.6 Creating Variables

Access the Add Variable form.

Figure 6–5   Add Variable form

After you enter the variable, click OK to save the information, and then click Cancel to exit the form.

Type
Enter a value to specify whether the variable is a numeric or text variable. If the variable is a numeric value, enter **I** (integer). If the variable is a text value, enter **S** (string). Values are stored in UDC 90CF/VT.

6.2.7 Creating Tokens

Access the Add Token form.

Figure 6–6   Add Token form

After you enter the token, click OK to save the information, and then click Cancel to exit the form.

Token Name
Enter a descriptive name for the token. The name that you choose should be easy to find in an alphabetical search. When you insert tokens into questions, you cannot search for tokens using a query by example (QBE) line. You select tokens from an alphabetical list. Also, because variables and tokens are closely linked, you might want to consider naming tokens and their associated variables with the same name.

Variable Name
Enter the name of the associated variable that is used to hold the value that you want to use to replace the token. For example, if the token that you are creating is used to

display the respondent's favorite color, enter the variable that is associated with the question **What is your favorite color?** in this field.

6.2.8 Creating Rate Sets

Access the Add Rate Set form.

Figure 6–7   Add Rate Set form

After you complete the Rate Set Name and Description fields, click OK, and enter the values that are associated with the rate set in the detail area of the form. After you enter values in the detail area, click OK to save the information, and then click Cancel to exit the form.

Figure 6–8   Rate Set - Manage {Rate Set Name} form

Rate Value

Enter the text value that you want to appear in the script when the system scores the script. For example, if you run a script to determine call priorities, you might want a particular script score value, or range of values, to be associated with critical priority calls. Therefore, enter **Critical** in this field.

Rate Score

Enter the lowest script score that is associated with this rate value in this field. For example, if you want scripts with a score of 0 through 9.999 to be associated with low priority calls, and scripts with a score of 10 or more to be associated with high priority calls, you might create two rate values, **Low** and **High**. You then enter **0** for the rate value of**Low,** and **10** for the rate value of **High**.

6.2.9 Creating Questions

Access the Add Question form.

Figure 6–9   Add Question form

Question Type
Determine the type of question that you want to create. The question type is determined by the answers the respondent is allowed to give. For example, if the respondent can choose only one answer, create a single select question. Values are stored in UDC 90CF/QT, and include:

G: Guide information

M: Multiple select

S: Single select

V: Value input

Question Weight
Enter the value that is associated with the question. This value is used to determine the score of the script in which the question is included. Typically, the most important questions in the script have a higher weight than the least important questions. You can enter question weights for single and multiple select questions only. The system:

Totals the question weight value of each question in a script, and then divides the total by the number of questions that have a question weight in the script to determine the question percentage for each question.

Multiplies the question percentage by the answer score of the selected answer to determine the score for the question.

Totals the score for each question in the script to determine the script score.

Compares the script score to the rate set that is associated with the script to determine the meaning of the script score.

Answer Set Name
Select the answer set that contains the valid choices for this question. When you create the script, you can specify which answers from the associated answer set appear to the user when the script is run.

Variable ID
Enter the identification number of the variable that you want to hold the value of the respondent's answer. This value can then be used to replace the token that is associated with this variable in subsequent questions. Using tokens and variables enables you to personalize questions based on the responses that are received.

Display Token
Click this link to display a list of available tokens. Tokens appear in alphabetical order. For a token to be valid, you must have used the associated variable in a question that appears in a script before this question. For example, if you use the **{Favorite Color}** token in the current question, you must have used the **{Favorite Color}** variable in a previous question. The variable is used to store the value that the system uses to replace the token. If no variable is used, no value exists to replace the token, and a user will see the token, rather than the variable value, when running the script.

6.2.10 Translating Questions

Access the Question – Manage {Question Name} form, Question tab. Click the Translation link.

Language
Select the language into which you want to translate the question.

Translated Question
Enter the translated text of the question in the specified language.

Translated Question Hint
Enter the translated text of the question hint in the specified language.

Save Changes
Click this button to save the translated text. The system creates a record in the detail area that lists the translated question, translated question hint, and language. You can then edit or delete the record if necessary.

6.3 Creating Scripts

This section provides an overview of script creation and discusses how to:

- Create a script header.

- Create a linear script.

- Create a branch script.

- Validate a script.

- Translate a script exit message.

- Clone a script.

6.3.1 Understanding Script Creation

After you have created script components, you can use them to build scripts. Scripts are predefined sets of questions or statements that are joined together in a specific

order, and used to gather information from respondents. Using the Script program (P90CF160), you first create a script header. After you save the script header, you can create these types of scripts using the Script Related Re-usable Subforms program (P90CFSUB):

- Linear scripts

  Linear scripts are fixed sets of questions or statements that are arranged in a fixed order. Questions are the same for each respondent, regardless of the answers given.

- Branch scripts

  Branch scripts are more complex than linear scripts. They include conditional logic that determines which questions appear, based on the respondent's answers.

When you create a script, the system creates records in these tables:

- F90CF160

- F90CF170

Scripts can be used to:

- Solve problems

- Capture information

- Fulfill requests

- Evaluate potential

Scripts can help an organization streamline and standardize information gathering processes, which in turn facilitate greater accuracy and consistency of data. Scripts provide repeatable processes that can help an organization increase efficiency and lower training time and costs. Scripts can help an organization simplify the diagnoses of complex issues, enabling less experienced employees to mirror the skill level of more experienced employees. You can also use tokens and variables within questions to configure scripts according to a respondent's answers.

You can also translate the exit message for a script into multiple languages. When a user runs the script, the exit message appears in the selected language if a translation in that language is available. If no translation is available in that language, the exit message appears in the language in which it was originally created. When you translate an exit message, the system creates a record in the F90CF16C table.

When you create a script, you can assign it a script type. Script types are used to classify different types of scripts, which can facilitate searching for scripts. You can create as many script type codes as necessary to meet the needs of the organization. Script type codes are stored in UDC 90CF/TY, and include values such as:

- Configure order

- Contact questionnaire

- Product advisor

- Troubleshooting guide

6.3.1.1 Scoring Scripts

Depending on the purpose of the script, you might choose to score the script based on the respondent's answers. You can score both linear and branch scripts. For a script to be scored, at least one of the questions in the script must contain a question weight, and the answer to that question must have a score value.

You must also associate a rate set with the script. The rate set is used to put the script score in context. For example, a script score of 10 does not necessarily tell a user anything about the respondent's situation. Therefore, the system associates the script score with the corresponding value in the rate set to give the score meaning. For example, the value of 10 might correspond to **High Priority** in the rate set that is associated with one script, but might correspond to **Low Priority** in the rate set that is associated with another script.

The system performs these steps to calculate the score of a script:

1. The system totals the question weight value of each question in a script, and then divides the total by the weight of each question in that script that has a question weight, to determine the question percentage for each question.

2. The system multiplies the question percentage by the answer score of the selected answer to determine the score for the question.

3. The system totals the score for each question in the script to determine the script score.

4. The system compares the script score to the rate set that is associated with the script to determine the meaning of the script score.

6.3.1.2 Scripting Trees and Nodes

When you build a script, the system displays the questions and answers in a hierarchical tree structure to help you identify parent, child, and sibling items, or nodes. A node is any line in the tree. There are four types of nodes:

- Root nodes

  A root node is the first node in a script tree. Root nodes must be followed by a question node. The system automatically creates the root node when you save the script header.

- Question nodes

  Question nodes are the questions in a script. Question nodes must be followed by one or more answer nodes or any nodes, with one exception:

  You do not need to follow a guide information question in a linear script with an any node or an answer node.

  For example, if you insert a single select question into a script, you must follow it with one or more answer nodes. Question nodes can follow an answer node or an any node.

- Answer nodes

  Answer nodes are children of their associated question node. Each answer node represents a valid answer choice for the question. You use answer nodes after single or multiple select questions. You can follow a set of answer nodes with an any node or a question node.

- Any nodes

  Any nodes are used to direct the script when no answer nodes, or multiple answer nodes, are chosen. Any nodes can follow a question or answer node. Any nodes are children of their associated question node. You must include an any node in these situations:

  – In branch or linear scripts, an any node must follow a value input question.

You cannot put an answer node after this question type, and you cannot follow a question node with another question node. Therefore, you insert an any node to direct the system to the next question in the script.

– In a branch script, an any node must follow a guide information question, unless that question is the last question in the script.

You cannot put an answer node or another question node directly after a guide information question node in a branch script.

– In a branch script, if a question has one or more answers with a follow-up (child) question, but not all of the questions have a follow-up question.

The any node directs the system to the next question in the script if the user chooses one of the answers that does not have a follow-up question. For example, you might ask respondents what their favorite color is, and allow them to choose from red, blue, yellow, or green. Your organization has bright red and maroon products. Therefore, if the respondent chooses red, you might ask a follow-up question such as **Do you prefer bright red or maroon?**

However, if the respondents answered that their favorite color was blue, yellow, or green, and you offer only one type of blue, yellow, or green product, you might not include follow-up questions for those answers. Therefore, in addition to inserting answer nodes for red, yellow, blue, and green, you must insert an any node for this question. The any node directs the system to the next question in the script if an answer with its own path is not chosen. If the respondent chooses red, the system brings the user to the next question under the red path. However, if the respondent chooses yellow, there is no path to follow that is associated with the yellow answer. Therefore, the system uses the any node to direct the user to the next question in the script.

– In a branch script, an any node must follow a multiple select question.

If a single answer is selected, the system follows the branch that is associated with that answer node, if one exists. If the answer node does not have its own branch, the system follows the any node. Additionally, if multiple answers are selected, it is possible that each of those questions has a separate branch. Therefore, when multiple answers are selected, the system follows the any node. The any node directs the system to the next valid question in the script. The system disregards the paths of the selected answer nodes if multiple answers are selected, as each path might be different.

When you build scripts, you use the Add Question, Add Answers, Add Any Node, and Delete Node buttons to add nodes to the tree or remove them from the tree. To prevent you from adding nodes in the wrong location, these buttons are enabled and disabled depending on the user's location in the tree. For example, by disabling the Add Question button, the system does not allow you to enter a question node directly after another question node.

Caution: If you delete a node in the tree, the system deletes the selected node *and all of its children.* Therefore, you should carefully plan the script before you begin entering it to avoid deleting portions of the script. Also, you should validate the script often. When you validate the script, the system runs through the script from the top, and notifies you of any errors in the script. The more often you validate, the more likely it is that you identify and fix an error before it becomes necessary to delete large portions of the script.

6.3.1.3 Validating Scripts

As you create scripts, or after you have finished creating scripts, you can validate them to ensure that the script does not contain any errors, loops, or dead ends. The system includes these predefined validation rules:

■   Rule 1 — Single select questions must be followed by at least one branch node.

■   Rule 2 — Multiple select questions must be followed by at least one branch node.

■   Rule 3 — Value input questions must be followed by at least one branch node.

You can choose to run any or all of these three rules when you validate the script. If the system finds an invalid node in the script, it displays the node that is in error, along with the rule that the node failed to pass. The system then marks the script as inactive.

Run the validation process often during script creation to identify and fix errors early and to avoid having to delete significant portions of the script.

6.3.1.4 Tips for Creating Linear Scripts

Linear scripts are used when all respondents are asked the same questions, regardless of their answers. When you create a linear script:

■   Be aware of the hierarchy level when inserting nodes into a tree.

     For linear scripts, you cannot insert questions as children of answer nodes. All questions in a linear script must be at the same hierarchical level. Therefore, to add a question node to a linear script, you must select the question node after which you want the new question to appear. Do not select the last answer node of the question under which you want the new question to appear. The system disables the Add Question button when you select an answer node.

■   The rules for any nodes are different in linear and branch scripts.

     It is not necessary to insert an any node after a guide information question in a linear script. The system allows you to enter question nodes directly after a guide information question node when you are creating a linear script.

6.3.1.5 Tips for Creating Branch Scripts

Branch scripts can be complex due to the fact that you can create several different paths within a single script. Be aware of these items when creating branch scripts:

■   Be aware of the hierarchy level when inserting nodes into a tree.

     When you select a node, and click one of the Add buttons, the system adds the node as a child of the selected node. To add a question at the end of the script, you select the last node in the tree and click the Add Question button. However, if the last node in the tree is an answer node, the question that you add will be a child of that answer node.

     If you do not want the next question to be a child of one of the answer nodes (and therefore, only asked to respondents who choose that answer), you must insert an any node at the end of the tree, and then insert the question as a child of the any node. The any node directs the system to the next question when the respondent picks multiple answers or picks a single answer that does not have its own path.

■   Be aware that when you begin down a specific path, the system continues down that path and does not return to questions that are at higher hierarchical levels.

     For example, you might ask respondents their favorite color at the beginning of the script. The three available answers are red, blue, and yellow. If the respondents pick red, you might ask them whether they prefer bright red or maroon. However,

if the respondent picks blue or yellow, there are no follow-up questions that are associated with those answers.

In this situation, even if the next question for all respondents is the same, you must insert it into the script in two places: once for the respondents who choose blue or yellow, and once for the respondents who chose red and were directed to the follow-up question about the type of red. Because the system branched out into the red path, all subsequent questions for red respondents must be children of the question regarding their preferred type of red. All subsequent questions for respondents who chose yellow or blue are children of an any node that falls under the favorite color question node.

Given this information, you might try to insert the questions that must be asked to all respondents at the top of the script before you begin creating separate branches.

This graphic illustrates an example of a simple branch script:

Figure 6–10 Example of a simple branch script
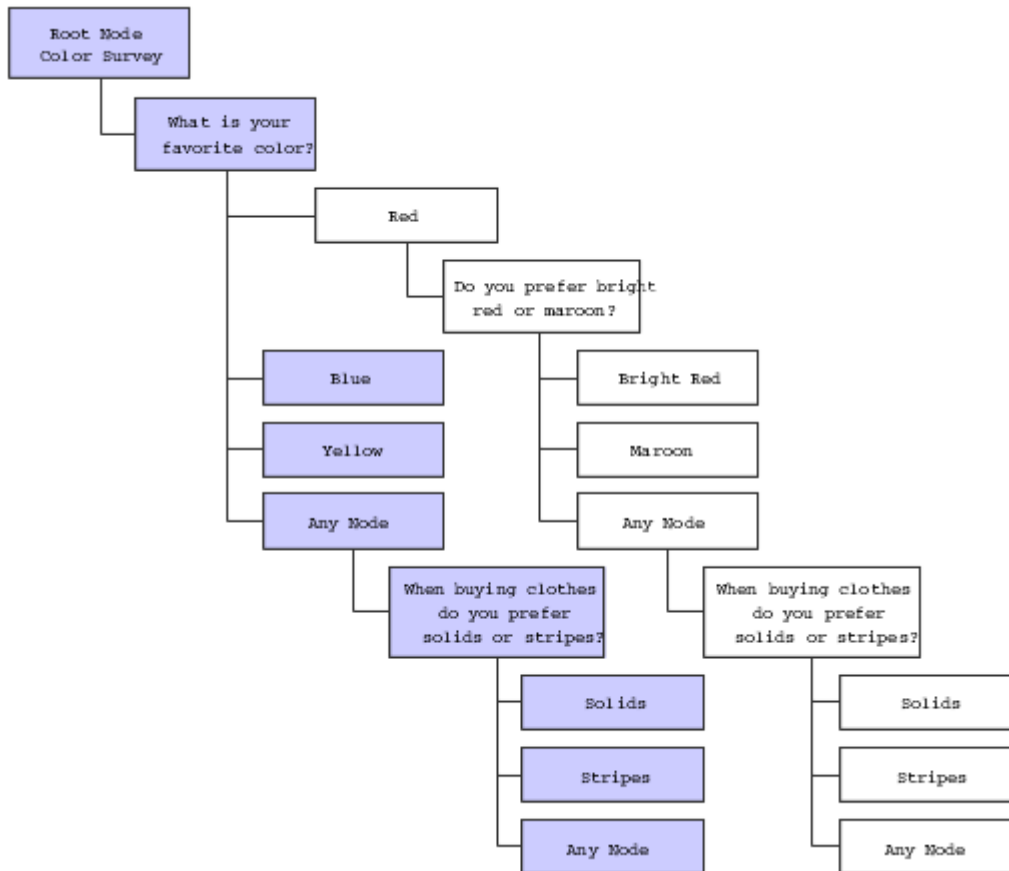
6.3.1.6 Cloning Scripts

If the organization uses scripts that are similar to each other, you can create one generic script and then clone the script as many times as necessary. You can then make changes to each script so that the scripts are specific to the business needs.

6.3.1.7 Adding Items to a Script

After you create a script, you can attach items to the script. You might choose to attach an item to a script if that script is used to solve issues that are associated with the item.

Users can then search for scripts that are associated with that item when trying to resolve cases or work orders that are associated with the item. When you add an item to a script, the system creates a record in the F90CF16B table.

You add items to a script by using the Related Objects tab on the Script –Manage {Script Name} form.

6.3.2 Forms Used to Create Scripts

Form Name	FormID	Navigation	Usage
Search for Scripts	W90CF160E	Scripting Setup (G90CF), Script Entry	Select existing scripts, or access forms to create new scripts.
Add Script	W90CF160C	Click Add on the Search for Scripts form.	Create a script header.
Script - Manage {Script Name}	W90CF160B	Click Save and Continue on the Add Script form, or select the script header on the Search for Scripts form, and then click Select.	Create, validate, clone, or add items to a linear or branch script, and translate the final script message.

6.3.3 Creating a Script Header

Access the Add Script form.

After you create the script header, click Save and Continue to begin building the script. Proceed to the tasks in this section for further instructions.

Figure 6–11   Add Script form

Script Category
Specify whether you are creating a branch script or a linear script. Values are:

B: Branch script

L: Linear script

Script Type
Enter a value to specify the type of situation in which the script should be used. Use script types to separate scripts into meaningful categories. For example, you might choose to create script type codes for each product area that the service department or call center supports. Values are stored in UDC 90CF/TY and include codes such as:

CO: Configure order

CQ: Contact questionnaire

LQ: Lead qualification

PA: Product advisor

TG: Troubleshooting guide

Visibility
Enter a value to specify whether you want this script to be available to internal users only or to internal users and self-service users as well. Values are stored in UDC 90CE/VI and include:

AL: All users

IN: Internal users only

Total Script Weight
Review this field after you add questions to the script to determine the total number of points that are associated with the script. This system populates this field with the total of the question weight of each question in the script.

Rate Set
Enter the rate set that is used to give meaning to the score of the script. When a user runs the script and enters a respondent's answers, the system scores the script instance. The system then compares the numeric score to the rate set to determine what the value means when associated with this script. For example, one rate set might classify a script score of 10 as **Low Priority**, and another rate set might classify a script score of 10 as **High Priority**.

Last Question Message
Enter the last question or statement that a user sees and reads when they reach the end of a script.

6.3.4 Creating a Linear Script

Access the Script – Manage {Script Name} form, Tree tab. Click the Detail link.

Figure 6–12   Script - Manage {Script Name} form: Tree tab: Detail link

To create a linear script:

1. Select the root node, which contains the name of the script.

2. To add a question to the script, click the Add Question button.

   The Question Information section appears on the form. You might need to scroll down to view this section on the screen.

3. In the Question Information section, select the question that you want to add to the script by populating the Question ID field.

   The system displays the text of the selected question in the Question field.

4. To insert the selected question, click the Insert Selected Question button, or click Cancel, and then select a new question.

   When you insert the question into the script, the system adds a question node to the script tree.

   > **Note:** You can create a new question at this point; click the Create New Question button. If you choose to create a new question here, you must complete steps 3 and 4 after you create the question to add it to the script.

5. In the script tree, select the question that you inserted.

   If you inserted a single or multiple select question, click the Add Answers button, and proceed to the next step.

   If you inserted a value input question, click the Add Any Node button. To add another question to the script, select the question node under which you want to insert a new question, click the Add Question button, and return to step 3 to continue building the script.

   If you created a guide question, return to step 2 to continue building the script.

6. To add answer nodes to the question, scroll down to the Answer Set Information section of the form, select all of the answers that you want to attach to the question, and then click Insert Selected Answers.

The system inserts answer nodes for each selected answer under the associated question. To add another question to the script, select the question node under which you want to insert a new question, click the Add Question button, and return to step 3 to continue building the script.

> **Note:** If necessary, you can create an answer set at this point; click the Create Answer Set button and complete the steps to create an answer set.

7. When you have finished adding all question, answer, and any nodes to the script, click Save Changes.

8. To preview the script, click the Preview Runtime button.

The system creates an instance of the script and runs the user through the script. When you have finished running through the script, click Finish. The system returns to the script tree.

9. Verify that all changes have been saved, and then click Close to exit the program.

6.3.5 Creating a Branch Script

Access the Script – Manage {Script Name} form, Tree tab. Click the Detail link.

Figure 6–13   Script - Manage {Script Name} form: Tree tab: Detail link
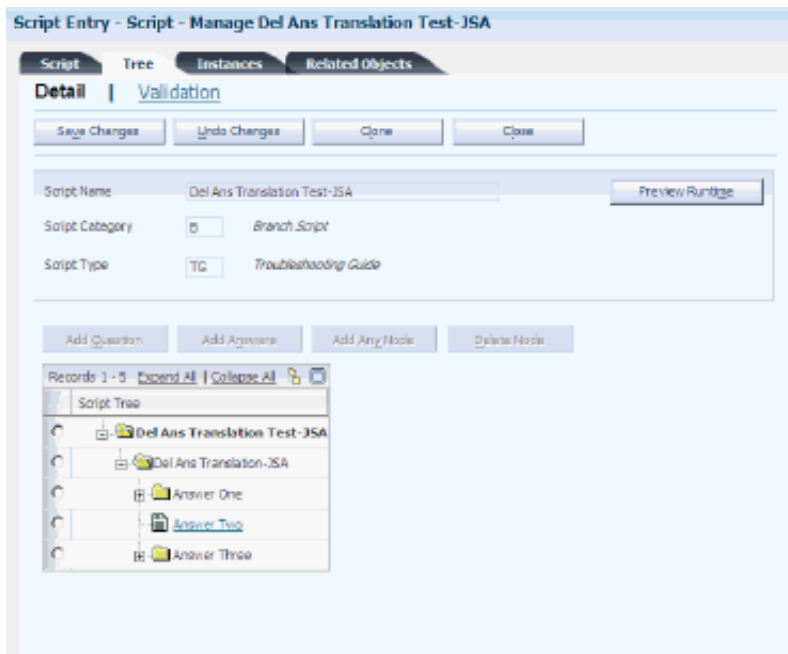
To create a branch script:

1. Select the root node, which contains the name of the script.

2. To add a question to the script, click the Add Question button.

The Question Information section appears on the form. You might need to scroll down to view this section on the screen.

3. In the Question Information section, select the question that you want to add to the script by populating the Question ID field.

   The system displays the text of the selected question in the Question field.

4. To insert the selected question, click the Insert Selected Question button, or click Cancel, and then select a new question.

   When you insert the question into the script, the system adds a question node to the script tree.

   > **Note:** You can create a new question at this point; click the Create New Question button. If you choose to create a new question here, you must complete steps 3 and 4 after you create the question to add it to the script.

5. In the script tree, select the question that you inserted.

   If you inserted a single or multiple select question, click the Add Answers button, and proceed to the next step.

   If you inserted a value input or guide information question, click the Add Any Node button. Then, select the answer, question, or any node under which you want to insert a new question, and return to step 3 to continue building the script.

6. To add answer nodes to the question, scroll down to the Answer Set Information section of the form, select all of the answers that you want to attach to the question, and then click Insert Selected Answers.

   The system inserts answer nodes for each selected answer under the associated question. If you added answer nodes under a multiple select question, you must insert an any node at the same level as the answer nodes before you can add any additional questions under that question. It is not necessary to insert an any node after a single select question.

   To add another question to the script, select the answer, question, or any node under which you want to insert a new question, click the Add Question button, and return to step 3 to continue building the script.

   > **Note:** If necessary, you can create an answer set at this point; click the Create Answer Set button and complete the steps to create an answer set.

7. When you have finished adding all question, answer, and any nodes to the script, click Save Changes.

8. To preview the script, click the Preview Runtime button.

   The system creates an instance of the script and runs the user through the script. When you have finished running through the script, click Finish. The system returns to the script tree.

9. Verify that all changes have been saved, and then click Close to exit the program.

6.3.6 Validating a Script

Access the Script – Manage {Script Name} form, Tree tab. Click the Validation link.

Figure 6–14   Script - Manage {Script Name} form: Tree tab: Validation link

Rule 1
Select this option if you want the system to validate that all single select question nodes are followed by at least one answer node.

Rule 2
Select this option if you want the system to validate that all multiple select question nodes are followed by at least one answer node.

Rule 3
Select this option if you want the system to validate that all value input question nodes are followed by at least one answer or any node.

Validate Script
Click this button to validate the script against the selected rules. If the validation is successful, the system displays **Tree is Valid** under this button. If the script is not valid, the system displays a grid, listing all of the nodes that are invalid and the rule that the node failed to pass.

6.3.7 Translating a Script Exit Message

Access the Script – Manage {Script Name} form, Script tab. Click the Translation link.

Figure 6–15   Script - Manage {Script Name} form: Script tab: Translation link

Translated Exit Message

Enter the text of the exit message in the language that appears in the Language field, and then click Save Changes. The system adds the translated record to the detail area of the form. You can create translations in multiple languages, but you can have only one translation per language.

6.3.8 Cloning a Script

Access the Script – Manage {Script Name} form, Tree tab. Click the Detail link.

To clone a script:

1. Click the Clone button.

2. On Clone Script, enter the name of the new script in the Script Name field.

   To return to the previous form without cloning the script, click the Return to Define Tree link before you click Clone.

3. To access the script tree of the newly created script, click the Return to Cloned Script link.

   To return to the original script, click the Return to Define Tree link.

4. Update the script as necessary, save changes, and then click Close to exit.

6.4 Managing Scripts

This section provides an overview of script management, lists prerequisites, and discusses how to:

- Run a script for a case or work order using Solution Advisor.
- Run a script for a case or work order using Related Actions.

6.4.1 Understanding Script Management

After you have created valid scripts in all of the necessary languages, you can begin using those scripts to gather information and to assist in solving support calls and service work orders.

6.4.1.1 Scripts, Cases, and Work Orders

You use scripts to help solve open cases and work orders on which the support and service teams are working. Scripts can help support and service representatives diagnose issues by providing a list of questions and possible answers. For example, the script might ask callers what model of a given product they are using. Depending on the model selected, the script can then ask a series of questions that are specific to that product model. This table illustrates how a support representative might use a script to solve a case or work order:

Questions	Responses
What product is causing your issue?	I'm having trouble with the widgets that we purchased.
What model widget are you using?	I'm not sure.
Is it red or black?	Black.
Is it larger or smaller than a golf ball?	Smaller.
I believe you are using widget model 500A.	No response necessary, as this was a guide information question.
Are you using the 500A widgets in refrigerators or in freezers?	Refrigerators.
Does the widget appear to be loose?	Yes.
You'll need to tighten that up using a crescent wrench. That should fix your problem.	No response necessary, as this was a guide information question.

To use scripts to solve cases and work orders, you can use either the Solutions or the Related Actions tab to find and run scripts.

If you are using Solution Advisor, you can search for scripts by accessing the Advanced Search on the Solutions tab of the case or work order. When you find the script that you want to run, click the script ID to run the script. The system creates an instance of the script for the associated case or work order. You can then review all script instances on the Related Actions tab. To search from scripts using JD Edwards EnterpriseOne Solution Advisor, you must set up the Case Management constants.

See Setting Up Case Management Constants.

Alternatively, you can use the QBE search on the Related Actions tab to search for scripts. When you identify a script that you want to use, you can then select it and run it from the Related Actions tab.

Regardless of the method that you use to run the script, the system uses the Script Runtime program (P90CF180) to run the script.

See Entering and Reviewing Related Actions.

6.4.1.2 Script Instances

When you run a script, the system creates an instance of the script to hold the respondent's answers and comments. Each time you run a script, the system creates a new instance. You can see all of the script instances that are associated with a case or work order by reviewing the Related Actions tab. When you associate and run a script from a case or work order, the system populates these tables:

- F90CF180
- F90CG503

When you run through a script instance, you can save information as you go; click the Save and Continue button. You can also save the instance as it is at the current time, and complete the script at a later time using the Save For Later button. While you are working with the script, you can return to previous answers and make changes. However, be aware that if you change an answer to a question in a branch script, the system deletes all of the information below that change. This is necessary because it is possible that changing an answer causes the script to include different questions than those that were asked before the answer was changed.

When you complete the script instance, you click the Finish button to save the script. After you click the Finish button, you cannot update answers in the script. However, if necessary, you can create another instance of the same script.

6.4.1.3 Related Objects

When you create a script, you can associate it with items that the organization supports, services, or sells. Items are considered related objects to a script. After you begin creating script instances from cases and work orders, the associated cases and work orders are also considered related objects.

You can review all of a script's related objects directly from the script. This information can be useful in determining how useful a script is. Reviewing the related objects shows you how many times the script has been used.

6.4.2 Prerequisites

Before you can run a script from a case or work order, you must complete one of these tasks:

- Create a case.

- Create a work order.

  See Also:

  - Entering Cases.
  - "Managing Work Orders" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

6.4.3 Forms Used to Manage Scripts

Form Name	FormID	Navigation	Usage
Work With Case Management	W17500A	Daily Support Processing (G90CE01), Case Entry	Access existing cases, or access forms to enter new cases.
Manage Case	W90CG501J	Select a case on the Work With Case Management form, and click Select.	Access the Solution or Related Action tab to enter and review scripts that are associated with cases.
Search For Service Work Orders	W90CD020B	Daily Work Order Processing (G1712), Service Management Workbench	Access existing work orders and forms to enter new work orders.
Service Work Order - Manage {Work Order Name}	W90CD002B	Select a work order on the Search for Service Work Orders form, and click Select.	Access the Solution or Related Action tab to enter and review scripts that are associated with work orders.

Form Name	FormID	Navigation	Usage
Search for Scripts	W90CF160E	Scripting Setup (G90CF), Script Entry	Select an existing script.
Script - Manage {Script Name}	W90CF160B	Select a script on the Search for Scripts form, and then click Select.	Review script instances and related objects by selecting the Instances or Related Objects tab.

6.4.4 Running a Script from a Case or Work Order Using Solution Advisor

Access the Case Entry – Manage {Tab Name} form, Solution tab, or the Service Work Order – Manage {Work Order Name} form, Solutions tab. Click the Search link.

To run a script from a case or work order:

1. Click the Advanced Search link.

2. To search for scripts that are associated with the case or work order, select the Script option.

3. Enter key words in the Script Name and Description fields to assist in searching for scripts that are related to the issue, and choose the type of search for each **(Match All, Match Any,** or **Match Exact).**

4. If applicable, in the Item field, enter the item number that is associated with the issue to search for scripts that are also associated with that item.

5. Click Search and scroll to the bottom of the form to review a list of scripts that match the search criteria.

6. To create an instance of the script and associate it with the case or work order, click the ID link.

7. On Runtime for {Script Name}, the system prompts the user with the first question in the script.

8. Choose the answer and click Next to move to the next question in the script.

   As the user progresses through the script, the system records the questions and answers on the left side of the form.

9. At any time during the script run, you can save the information; click the Save and Continue button.

   You can also save the script instance to run at a later time; click the Save for Later button.

10. When you reach the end of a script, the Last Question Message appears, and you can click Finish to save the script instance.

6.4.5 Running a Script from a Case or Work Order Using Related Actions

Access the Case Entry – Manage {Tab Name} form, Related Actions tab, or the Service Work Order – Manage {Work Order Name} form, Related Actions tab.

To run a script from a case or work order using Related Actions:

1. From a case, select **Script** from the available options, and then click Add.

   From a work order, click Add.

2. On the Select Script form, locate the scripts that are associated with the issue using the Script ID, Script Category, Script Name, and Visibility search fields.

3. Select the script that you want to run, and then click Select.

4. On Runtime for {Script Name}, the system prompts the user with the first question in the script.

5. Choose the answer, and click Next to move to the next question in the script.

As the user progresses through the script, the system records the questions and answers on the left side of the form.

6. At any time during the script run, you can save the information; click the Save and Continue button.

You can also save the script instance to run at a later time; click the Save for Later button.

7. When you reach the end of a script, the Last Question Message appears, and you can click Finish to save the script instance.

7

Setting Up Solution Advisor

This chapter contains the following topics:

7.1 Understanding Solution Advisor

Solution Advisor is a knowledge base application that assembles and classifies customer-specific information. The information is accessible by customers, as well as service and support agents, all of whom have the ability to search the knowledge base for an appropriate solution to a specific case or work order.

Solution Advisor comprises these components:

- Solutions
- Solution libraries
- Solution searches

7.1.1 Advanced Text Search

You can use advanced text search functionality to perform searches of JD Edwards EnterpriseOne data. Advanced text searches enable you to:

- View the score of each search result.

  The system determines which search results most closely match the search criteria, and displays the score as a percentage in the Score field. Typically, search results with high score values are the most useful.

- Search text within media objects.

  You can search the text in the media object notes that are attached to cases and work orders.

- Search using wildcards.

You can use * (asterisk) as a wildcard in words or phrases. For example, if you search for cases related to item number R500*, the system displays cases or work orders associated with items R500A, R500B and R5000.

To use advanced text searches with Solution Advisor, you must define the data source for these business views:

- V90CE03A

- V90CE03B

- V90CE03C

- V90CE03D

- V90CE03E

- V90CE03F

You must also define text search properties for each business view, and build each search index.

You can use the SES Text Search Build program (R958001A) to build an index.

This program builds an index for all business views that are set up for text searches. You can choose different versions of this program to create a full indices, optimize indices, or clear indices.

You must create a full build at least one time before you can search for solutions using advanced options.

Note: The SES Text Search Build program (R958001A) is not located on a menu. To access this program, use batch versions, which you access by typing **BV** in the fast path.

See Also:

- For complete instructions about setting up advanced text searches and indices, see the *JD Edwards EnterpriseOne Tools System Administration Guide*.

7.2 Prerequisite

Before you complete the tasks in this chapter, you must specify in the S&WM Constants Revisions program (P17001) that you are using Solution Advisor. You specify whether you use Solution Advisor on the Case tab and the Work Order tab.

See Setting Up Case Management Constants.

See "Setting Up Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

"Setting Up Service and Warranty Constants" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

7.3 Setting Up Solution Advisor User Defined Codes (UDCs)

This section provides an overview of Solution Advisor UDCs and discusses the UDCs that you must set up to use solutions.

This table describes the UDC tables that you must set up for solutions:

UDC	Type of Data
90CE/AS	Associated Solution Status
	Define the solution status. The system uses this UDC table in the Status field on the Attempted Solutions form, which is accessed from the Solutions tab on the Case Entry form. Do not change the UDC values that are already set up in this table because the system uses these values for processing. You can change the value descriptions and add additional values, as needed.
90CE/SS	Solution Detail Status
	Define the solution status. Do not change the UDC values that are already set up in this table because the system uses these values for processing.
90CE/ST	Solution Detail Type
	To facilitate searching, further define the type of solution.
90CE/VI	Solution Detail Visibility
	Define the solution visibility. Do not change the UDC values that are already set up in this table because the system uses these values to determine which solutions are visible to customers. Solutions with value **All** are visible to customers.

7.4 Creating Solutions

This section provides an overview of solutions and discusses how to create a solution.

7.4.1 Understanding Solutions

Solutions are records of known resolutions that are created to assist agents or customers with an issue. Each solution record stores a number of attributes designed to help you locate the solution quickly or resolve the issue.

These solution attributes include this information:

- Summary description.

- Detailed description.

- List of symptoms that the solution can resolve.

- Set of key words commonly associated with the issue.

Only solution administrators have permission to manage and maintain the solution knowledge base. They are responsible for creating, updating, deactivating, and approving solutions.

Call center agents can search on and create new solutions when they attempt to resolve a case or work order. Initially, the new solution is specific to a single case or work order. Upon approval, the solution becomes part of the knowledge base, and is available to all agents for case or work order association.

By using customer self service, customers can search for solutions and submit draft solutions. You can then review these draft solutions and add them to the solution library.

See *JD Edwards EnterpriseOne Applications Customer Self Service Implementation Guide*.

7.4.1.1 Related Objects

By using the Solutions program, you can associate solutions to items and review a list of cases and work orders to which the solution has been associated. You access this information through the Related Objects tab on the Solution Add form.

After you enter and save the basic solution information, you can associate solutions to items. When you enter a case or work order for a specific item, the solution displays on the Frequently Used form for you to review and select the appropriate solution. The solution displays on the Frequently Used form after it has solved at least one case or work order with the selected item. Until the solution has solved a case associated with the selected item, it does not appear on the Frequently Used form.

When a solution is associated with a case or work order, the system updates the solution record with the relationship information. The solution record includes all cases and work orders to which the solution has been applied, regardless of whether the solution solved the case or work order. The system maintains the list of related cases and work orders in real-time. These relationships cannot be deleted.

Solution administrators can use this information to review the quantity of cases and work orders with which the solution has been associated, as well as the details of each case or work order with which the solution has been associated. Solution administrators can also view which other solutions have also been associated with a case or work order.

See Working with Solutions.

7.4.1.2 Attachments

Use the Attachments tab in the Solution program to attach additional information. Attachments are visible on solution summary forms, including self service forms. Therefore, you typically want all attachments (especially those associated with solutions having a visibility of **All)** to be files that a customer uses when applying the solution. You can access the attachment form through the Attachments tab in the Solution Add form.

7.4.2 Forms Used to Create Solutions

Form Name	FormID	Navigation	Usage
Search for Solutions	W90CE050C	Solution Advisor (G90CE0302), Define Solutions	Search for and review solutions.
Add Solution	W90CE050B	Click Add on the Search for Solutions form.	Create solutions.

7.4.3 Creating a Solution

Access the Add Solution form.

Figure 7–1   Add Solution form

Library

Select the solution's primary library. This library is considered the solution's owning library. You define libraries by using the Add Library form.

See Creating Solution Libraries.

Status

Select the appropriate solution status from UDC 90CE/SS. When you create solutions through the Case Entry program, the system automatically assigns them a **Draft** status. Only solutions with an **Active** status are available for viewing by users other than solution administrators. When solutions are approved, the system changes their status to **Active** to make them available. Select **Inactive** when you want to expire a solution or make it no longer available.

Type

Select the appropriate type from UDC 90CE/ST. Typically, select either **Standard** or **Workaround.**

The systems assigns the type **Adhoc** to solutions that are created when agents enter an independent text resolution. You can convert these standard solutions by changing the type.

The system assigns the type **Canned** to solutions that are created when self service users select predefined case or work order closure reasons.

Visibility

Select **All** if you want self service users to view the solution. Select **Internal** to prevent self-service users from using this solution.

Solution Summary

Enter a short description of the solution. You can use this field to search for solutions.

Keyword or Phrase
Enter search keywords or a phrase for a solution.

Symptoms
Enter a description of the problem that the solution addresses.

Details
Enter the full explanation of how to solve the problem.

7.5 Creating Solution Libraries

This section provides an overview of solution libraries and discusses how to create a solution library.

7.5.1 Understanding Solution Libraries

A solution library:

- Groups solutions under a common header.

- Organizes solution information logically.

- Creates an intuitive solution repository and a less complicated search experience.

In the Solution Library program (P90CE040), create groups with which one or many solutions are associated. Each solution can be associated with only one solution library. Only those users with solution administrator rights can access this program and create new libraries.

7.5.2 Forms Used to Create Solution Libraries

Form Name	FormID	Navigation	Usage
Search for Libraries	W90CE040C	Solution Advisor (G90CE0302), Define Solution Library	Search for solution libraries.
Add Library	W90CE040A	Click Add on the Search for Libraries form.	Define solution libraries.

7.5.3 Creating a Solution Library

Access the Add Library form.

Figure 7–2   Add Library form

Library Name
Enter a name for the library.

Library Description
Enter a short description of the library.

7.6 Updating the Usage and Solved Count

This section provides an overview of the usage and solved count and discusses how to run the Frequently Used Solution Processing program (R90CE01).

7.6.1 Understanding the Usage and Solved Count

Each solution record stores metrics, such as a usage count and a solved count. The usage count enables an administrator to evaluate how often a solution is selected, whereas the solved count identifies how often the solution resolves the case or work order for which it was selected. Additionally, the metrics are used to generate a list of the most frequently used solutions for each case or work order, based on the inventory item that is associated with the case or work order.

7.6.1.1 Solved Count

The solved count indicates how many cases and work orders the solution has resolved. This number is informational only; Solution Advisor displays this number to help you determine a solution's potential. This number increases by one every time that you set a solution status to **Successful Resolution.** The number decreases by one if you change the status of a solution that was formerly designated as successful. You must run the Frequently Used Solution Processing program (R90CE01) for the system to update the solved count.

7.6.1.2 Usage Count

The usage count indicates with how many cases and work orders the solution has been associated, regardless of whether the solution was successful.

This number is a minor factor in determining the relevance score when you use Solution Advisor to search for solutions. This number increases by one every time that you associate the solution with a case.

7.6.2 Running the Frequently Used Solution Processing Program (R90CE01)

To access the Frequently Used Solution Processing program (R90CE01), enter **BV** in the Fast Path field, and then enter **R90CE01** in the Batch Application field on the Work With Batch Versions form. Because only solution administrators run this program, it is not available on the Solution Advisor (G90CE0302) menu.

8

Entering Cases

This chapter contains the following topics:

8.1 Understanding Cases

As the main component of Oracle's JD Edwards EnterpriseOne Support systems, the JD Edwards EnterpriseOne Case Management system captures the details of customers' problems and provides a process to track cases from creation to resolution.

Use the Case - Manage form to enter and review all information related to a case. This form provides tabs and access to the Case Entry program (P90CG501), the Solution program (P90CG502), the Activities program (P90CG510), and the Related Actions program (P90CG503). You can also attach both internal and external messages or documents to the case using media objects.

You can create various objects related to a case, such as sales orders, quotes, scripts, service work orders, equipment work orders, leads, and returned material authorizations (RMAs), all within the context of a case using the Related Actions program.

Click the Related Links link in the Manage Case form to access each area of a case that you want to review. You can access multiple contact, customer, supplier, employee, item, equipment, and contracts programs using this link.

> **Note (Release 9.1 Update):** You can also access related programs (contact, customer, supplier, case time entry, item/equipment, contracts, supplemental data, and case history) from the Row menu on the Work With Case Management form of the Case Entry program (P17500). This option of accessing related programs from the Work With Case Management form is helpful if you use the Speed Case Entry program (P90CG601) because you cannot access the related programs from the Speed Case Entry form.

Use the Activities program to assign issues related to the case to other team members in order to resolve a customer problem. Activities, a foundational component of JD Edwards EnterpriseOne Customer Relationship Management (CRM), enable users to track case-related actions such as meetings, tasks, and to-dos. Activities appear on the calendar control.

8.1.1 Speed Case Entry (Release 9.1 Update)

You can set processing options in the Case Entry program (P17500) to use the Speed Case Entry program (P90CG601) to quickly add a new case or update an existing case. The add and update mode of the Speed Case Entry program contains logical grouping of fields in nine collapsible groupboxes. Use the Speed Case Entry program to:

- Access existing case information, enter new cases, or edit existing cases.

- Access the Related Actions program (P90CG602) to view existing related actions or add new related actions. You can view the status of the related actions (wherever possible) in the grid of the Manage Related Actions form.

See Entering and Updating Cases Using the Speed Case Entry Program (P90CG601) (Release 9.1 Update) and Entering and Reviewing Related Actions for Speed Case Entry (Release 9.1 Update).

8.2 Entering Basic Case Information

This section provides an overview of basic case information, lists a prerequisite, and discusses how to enter basic case information.

8.2.1 Understanding Basic Case Information

Before you can process a case and enter additional information (such as activities, billing, and solutions), you must enter basic data in the system—for example, a customer or item number—so the system can assign a case number and begin processing the case.

8.2.2 Prerequisite

Before you can enter a case, you must:

- Complete the steps described in the chapter named "Setting Up Case Management Fundamentals."

- Exist in the Address Book and be defined as a service provider.

- Complete the steps described in the chapter named "Setting Up Provider Groups."

See Setting Up Case Management Fundamentals.

See Setting Up Provider Groups.

and

See "Setting Up Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

"Setting Up Customers and Service Providers for Service Management" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

8.2.3 Forms Used to Enter Basic Case Information

Form Name	FormID	Navigation	Usage
Work With Case Management	W17500A	Daily Support Processing (G90CE01), Case Entry	Search for cases.
Add Case	W90CG504A	Click the Add button on the Work With Case Management form.	Enter basic case information.

8.2.4 Entering Basic Case Information

Access the Add Case form.

Figure 8–1   Add Case form (1 of 2)

Figure 8–2   Add Case form: Detail tab (2 of 2)

8.2.4.1 Customer

Customer Number
Enter the customer number.

If the customer exists in the system, the system retrieves information about that customer, such as a telephone number. This information appears by default. You can override default values, if necessary.

If the customer does not in exist the Address Book, click the Quick Add link and add the customer record.

See "Setting Up Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

"Setting Up Customers and Service Providers for Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

"Setting Up Customers for Service Management", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

Call Backs
Enter a value from UDC 17/CB to specify the number of callbacks for the case.

Caller Number
Enter the caller number to associate a third-party with the case, such as a technician or a customer service representative. The customer number appears by default in this field.

Caller Name
Enter the customer contact name for the case.

If the caller does not exist not in the Address Book, click the ellipsis (...) link and add the contact information.

Problem
Enter a short description for the case.

Depending on how you have set the processing options, you can use the first 80 characters from the media object as the default value for this field. If you are not using Solution Advisor and the Solution system constant is not selected, you can also click the Search button to select a failure description

See Setting Up Case Management Constants.

Reason
Enter the reason for the customer issue.

> **Note:** To attach additional text to the case, enter additional text in the text box on the form. When you define status rules, you can define when the text attached to a case is protected. When you protect text, you prevent changes to the text attached to a case. You can add to text that is protected; click the Append Text link. You cannot modify the existing text. The system appends a time stamp to the text area when the information changes.

Priority
Enter a value from UDC 17/PR to specify the case priority code. In conjunction with the F1753 table, this field determines the response time.

Case Status
Enter a value from UDC 17/ST to specify the case status, such as Open, Active, and so forth.

Case Type
Enter a value from UDC 17/CT to specify the case type.

Equipment Number
Enter an identification code that represents an asset. You might enter a serial number in this field based on the equipment constants. Enter the identification code in one of these formats:

Asset number: A computer-assigned, eight-digit numeric control number.

Unit number: A 12-character alphanumeric field.

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 you enter indicates whether you are entering the primary format that is defined for the system, or one of the other two formats. A special character, such as a forward slash (/) or asterisk (*), in the first position of this field indicates the asset number format that you are using. You assign special characters to asset number formats on the Fixed Asset System Constants form.

Inventory Item Number
Enter a number that the system assigns to an item. It can be in short, long, or third item number format.

Product Model/Family
Enter a code that classifies an inventory item into a model for customer service.

> **Note:** Based on the equipment number that you set up in the equipment record, the system retrieves the inventory item number, branch/plant log, and product model/family. If you do not enter the equipment number, the system retrieves the branch/plant lot and the product model/family, based on the inventory item number.

Product Component

Enter the components that make an equipment number or components associated with a customer site.

Environment

Enter the operating environment of the user.

Provider Group Number

Enter the provider group number. If you set up routing rules, the system automatically assigns the case to a particular provider group, based on the case type or generically. The provider group is assigned based on the routing rules. If the provider group is manually entered or appears by default from the processing options; it is not assigned based on the routing information.

If you enter a value other than the Address Book number—such as the long address or tax ID—you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the Address Book number in this field.

For example, if the Address Book number 4100 (total solutions) has a long address TOTAL and an asterisk (*) distinguishes it from other entries (as defined in the Address Book constants), you might type *TOTAL into the field. The system would return 4100.

See Setting Up Case Management Constants.

Assignee

Enter the assignee manually; or assign by the routing information or the escalation routine if you are using escalation by skill level.

If you are manually assigning cases, enter the Address Book number for the assignee.

If you enter a value other than the Address Book number—such as the long address or tax ID—you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the Address Book number in this field.

If you are escalating using skill levels and an assignee has been entered or appears by default from routing rules and the assignee is not an employee for the provider group, the case is reassigned to a provider group member in the escalation process.

If you set up routing rules that specify the case to be directed to an assignee, this field contains the default information.

See Working with Escalations.

and

See Setting Up Routing Information.

Service Package

Displays the service package by default if the case is entitled. A service package contains the service type, coverage type, response time, and coverage group.

Coverage Group
Displays default information for the service package. The coverage group consists of unlimited cost codes and the percentage covered for each cost code.

See "Managing Contracts", in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

8.2.4.2 Dates/Times
Select the Dates/Times tab.

Figure 8–3 Add Case form: Dates/Times tab

Date/Time Returned
Enter the date that the job is executed. When a case is first assigned, the system supplies the current date and time in this field and the Date/Time Begin field.

Date/Time On Site
Enter the date that the service provider arrives at the customer site.

Date/Time Committed
Displays the system-calculated commitment date and time.

If the case is covered under a contract, this field uses the current date and time plus the response time guaranteed in the contract.

If the case is not covered under a contract, this field displays the current date and time plus a guaranteed response time that is based on the provider group and case type. This value is multiplied by the commitment percentage, which is based on the provider group and priority.

See Setting Up Case Priorities Using Notification Escalation Method.

and

See Setting Up Priorities Using Skill-Level Escalation Method.

Users Time Zone
Displays the time zone defined in the service provider information listed in the Address Book record for the user entering the case.

Commitment Duration
Displays the amount of time that has elapsed between case entry and case assignment.

8.2.4.3 Additional Information
Select the Additional Information tab.

Figure 8–4   Add Case form: Additional Information tab

Parent Case Number
Enter the parent case number if the case is a child of another case or if cases are related.

Claim Number
Enter a claim number to link a claim that product end user submits. Claim numbers are found often on preprinted forms.

Case Source
Enter a value from UDC 17/SC to specify the source of a case, such as telephone, email, or web.

Tickler Date
Enter the date on which the transaction takes effect. The effective date is used generically. It can be the date of the next raise, a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or any other date that is appropriate.

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

Tickler Description
Enter a user-defined name or remark.

Responsible Business Unit
Enter the entity for where you want to track costs; for example, a warehouse location, job, project, work center, or branch/plant

You can assign a business unit to a voucher, invoice, fixed asset, and so forth, for responsibility reporting. The system provides reports of open accounts payable and accounts receivable by business unit, for example, to track equipment by responsible department.

Business unit security can prevent you from running inquiries on business units for which you have no authority.

Covered

Enter a value from UDC 41/9 to identify the general ledger offset to use when the system is searching for the account to which it posts the covered portion (by warranty or contract) of the accounting transaction. If you do not want to specify a general ledger offset, you can enter four asterisks (****) in this field or you can leave the field blank. If you leave the field blank, the system uses the general ledger offset from Oracle's JD Edwards EnterpriseOne Inventory system.

Non-Covered

Enter a value from UDC 41/9 to identify the general ledger offset to use when the system is searching for the account to which it posts the non-covered portion of the accounting transaction. If you do not want to specify a general ledger offset, you can enter four asterisks (****) in this field or you can leave the field blank. If you leave the field blank, the system uses the general ledger offset from the JD Edwards EnterpriseOne Inventory system.

Partner

Enter the partner number. A partner can be a third-party that you attach to a case. For example, a partner might be a company that you use to resolve a case.

See "Managing Partners" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

8.2.4.4 Category Codes

Access the Category Codes form. Select the Category Codes tab.

Case Category Codes and Equipment Category Codes

Review and enter category codes for cases or equipment. Complete the category code fields, as necessary.

8.3 Entering Billing Information for a Case

This section lists a prerequisite and discusses how to enter billing information.

8.3.1 Prerequisite

Before you complete the tasks in this section, you must complete the tasks required for setting up billing for cases.

See Understanding Case Management Billing.

8.3.2 Form Used to Enter Billing Information for a Case

Form Name	FormID	Navigation	Usage
Billing Information	W90CG501B	Daily Support Processing (G90CE01), Case Entry	Enter billing information for a case.
		Select the customer on the Work With Case Management form, and click Select	
		From Case Entry, click the Billing link.	

8.3.3 Entering Billing Information

Access the Billing Information form.

Note: If you are running an inquiry on a case that you have already billed, some of the fields in this task might be disabled.

The system displays the Billing Information form only if you activated the Bill for Cases processing option on the Process tab for the Case Update program (P90CG501).

8.3.3.1 Customer Info

Bill To Number and Send Invoice To Number
Enter the Address Book number for the bill-to address or the send-to invoice address. If you enter a value other than the Address Book number—such as the long address or tax ID—you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the Address Book number in this field.

For example, if the Address Book number 4100 (total solutions) has a long address TOTAL and an asterisk (*) distinguishes it from other entries (as defined in the Address Book constants), you might type *TOTAL into the field, and the system would return 4100.

PO Number
Enter an alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.

Payment Terms
Specify the terms of payment, including the percentage of discount available if the invoice is paid by the discount due date. Use a blank code to indicate the most frequently-used payment term. You define each type of payment term on the Payment Terms Revisions form. Examples of payment terms include:

Blank: Net 15.

001: 1/10 net 30.

002: 2/10 net 30.

003: Due on the 10th day of every month.

006: Due upon receipt.

This code prints on customer invoices.

Payment Instrument
Enter a value from UDC 00/PY to specify how payments are made by the customer. For example:

C: Check

D: Draft

T: Electronic funds transfer

Responsible Business Unit
Enter the entity within the business for which you want to track costs; for example, a warehouse location, job, project, work center, or branch/plant. This field is alphanumeric.

You can assign a business unit to a voucher, invoice, fixed asset, and so forth, for responsibility reporting. The system provides reports of open accounts payable and accounts receivable by business unit, for example, to track equipment by responsible department.

Business unit security can prevent you from running inquiries on business units for which you have no authority.

8.3.3.2 Pricing Info

Select the Pricing Info (pricing information) tab.

Flat Rate and Time And Material
Enter a value that specifies whether a type of service is priced based on a flat rate or based on actual time and materials. Values are:

Blank: A blank value is only valid when defining the method of pricing for a service provider. It is used to indicate that the service provider is an internal service provider and is not paid.

F: Charges for labor are based on a flat rate. Charges for parts are already included in the flat rate.

T: Charges for labor are based on actual labor hours. Charges for parts are based on actual parts used.

Cost Type
Designate each element of cost for an item. Examples of the cost object types are:

A1: Purchased raw material.

B1: Direct labor routing roll-up.

B2: Setup labor routing roll-up.

C1: Variable burden routing roll-up.

C2: Fixed burden routing roll-up.

Dx: Outside operation routing roll-up.

Xx: Extra add-ons, such as electricity and water.

The optional add-on computations usually operate with the type Xx (extra add-ons). This cost structure can use an unlimited number of cost components to calculate alternative cost roll-ups. The system then associates these cost components with one of six user-defined summary cost buckets.

Adjustment Schedule
Enter a value from UDC 40/AS to identify the price and adjustment schedule. A price and adjustment schedule contains adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through customer billing instructions. When you enter a case, the system copies the schedule attached to the sold-to address into the order. You can override this schedule at the header level.

Price Effective Date
Enter the price effective date. The system uses the Price Effective Date field to determine the base price and all advanced pricing adjustments. The value loaded in this field is stored in the F4009 table.

Pricing Units

Enter the amount billed for a case. Depending on the type of charge calculated (the bill item rate basis), the value in this field multiplied by the billing rate produces the gross charge amount.

Pricing Unit of Measure

Enter a value from UDC 00/UM to specify the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic meter, liter, hour, and so forth.

Taxable

Select this check box if the case is taxable. The system enters default values in the Tax Explanation Code field and the Tax Rate/Area field.

(Release 9.1 Update) The alternate tax rate/area assignment functionality enables you to assign an alternate tax rate/area when the countries of the entities involved in a transaction are in the European Union (EU).

See "Setting Up Alternate Tax Rate/Area Assignment Functionality" in the *JD Edwards EnterpriseOne Applications Tax Processing Implementation Guide*.

You can set up the company, the responsible business unit and the site address number to use the alternate tax rate/area assignment functionality. When retrieving the billing information, the system checks if the alternate tax rate/area assignment functionality is enabled for the company. If the functionality is enabled, the system retrieves the tax rate/area for the cases added or modified, based on the combination of responsible business unit and site countries.

You can change the tax area from this form on the Pricing Info tab and you can change the entity Responsible Business Unit on the Customer Info tab. If you receive an error message, you can cancel the action and manually change the tax rate/area. If you manually change the tax rate/area, then the system does not overwrite the value you enter.

See "CRM - Case Management" in the *JD Edwards EnterpriseOne Applications Tax Processing Implementation Guide*.

8.3.3.3 Billing Amounts

Select the Billing Amounts tab.

Currency

Identify the transaction currency.

Exchange Rate

Enter the number that a foreign currency amount is multiplied by or divided by to calculate a domestic currency amount.

The number in this field can have a maximum of seven decimal positions. If more are entered, the system adjusts to the nearest seven decimal positions.

Foreign

Displays amounts in the domestic or foreign currency. Select this field to have the system display amounts in the foreign currency. Clear this field to have the system display amounts in the domestic currency.

Minimum Amount

Enter the minimum monetary amount to charge the customer. If the billable amount is less than the minimum amount, the system charges the customer for the minimum

amount instead of the billable amount. This monetary amount is expressed in the currency of the company.

Flat Rate Amount
Enter the monetary amount charged to the customer regardless of how many hours are spent or how many parts are used in performing the service. The monetary amount is expressed in the currency that is set up for the company initiating the transaction.

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

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

Discount Percent
Select this check box to indicate that this case is subject to a discount. If you use the discount percentage, the system calculates the discount based on a percentage of the billable amount.

Discount Amount
Enter the amount of the discount available, as opposed to the amount of the discount actually taken. The discount calculated is based on the invoice amount rather than the revenue amount.

Total Taxable Amount, Tax, and Total Billable Amount
Review the amounts in these fields. The system calculates the tax amount by using the tax rate area and the tax explanation code from the Pricing Info tab. The total billable amount is the sum of the Total Taxable Amount and the Tax fields.

Billable
Select this check box.

> **Note:** The Billable check box must be selected to generate an entry successfully when you run the Case Workfile Generation program (R17675).

8.4 Working with Solutions

This section provides an overview of solutions, lists a prerequisite and common fields used in this section, and discusses how to:

- Assign solutions to a case.

- Send solutions.

- Review frequently used solutions.

- Search for solutions to a case.

> **Note:** Solution Advisor is an additional application that can be used with cases.

8.4.1 Understanding Solutions

When you enter or review a case, you can access and assign solutions by using the Solutions tab in the Case Revisions program. The Solutions application enables you to:

- Review the attempted solutions.

- Review the frequently-used solutions.

- Search for solutions.

- Send solutions to a customer through email.

- Create a new solution that can be added to the solution repository.

8.4.1.1 Resolution Statuses

When you assign a solution to a case, it can have one of these statuses:

- **IC** (in consideration): You have not suggested this solution. The solution appears in the list of attempted solutions and is available when you're ready to try it.

- **FR** (failed resolution): The caller or technician attempted the solution, but the solution did not solve the problem.

- **SR** (successful resolution): The solution solved the problem. You can associate this status with only one solution listed in the Attempted Solutions grid for the selected case.

- **WC** (waiting on customer): You have suggested this solution, but you don't know whether the solution worked.

- **WD** (withdrawn): The solution should not be associated with the case and is not presented to the caller.

8.4.1.2 Resolution Process

You use Solution Advisor to search for resolutions to cases. You can search for solutions, cases, work orders, and scripts to find possible case resolutions. You access the basic and advanced search fields from the Solution tab on the Manage Case form. When you search for cases, solutions, work orders and scripts, the Solution Advisor returns results that match the search criteria. The system displays the score value of each search result. Typically, search results with the highest score provide the most valuable information, as they most closely match the search criteria that you enter. You can perform these searches with Solution Advisor:

- Wildcard searches.

  You can use asterisks (*) as wildcards when searching for solutions. For example, to search for cases that are related to items R500, R500A and R5001, you can enter R500* in the search criteria.

- Media object text searches.

  You can search the text in the notes that are attached to cases and solutions. Notes are attached to cases and solutions as media objects.

> **Note:** Resolutions do not change the status of the case. After you assign a successful solution for a case, the case status is updated to **999** (complete or closed). You must reopen the case by updating the Case Status field on the Case Update form before you can change the solution status.

This graphic illustrates the solution search and resolution process for cases:

Figure 8–5   Solution search process to resolve cases
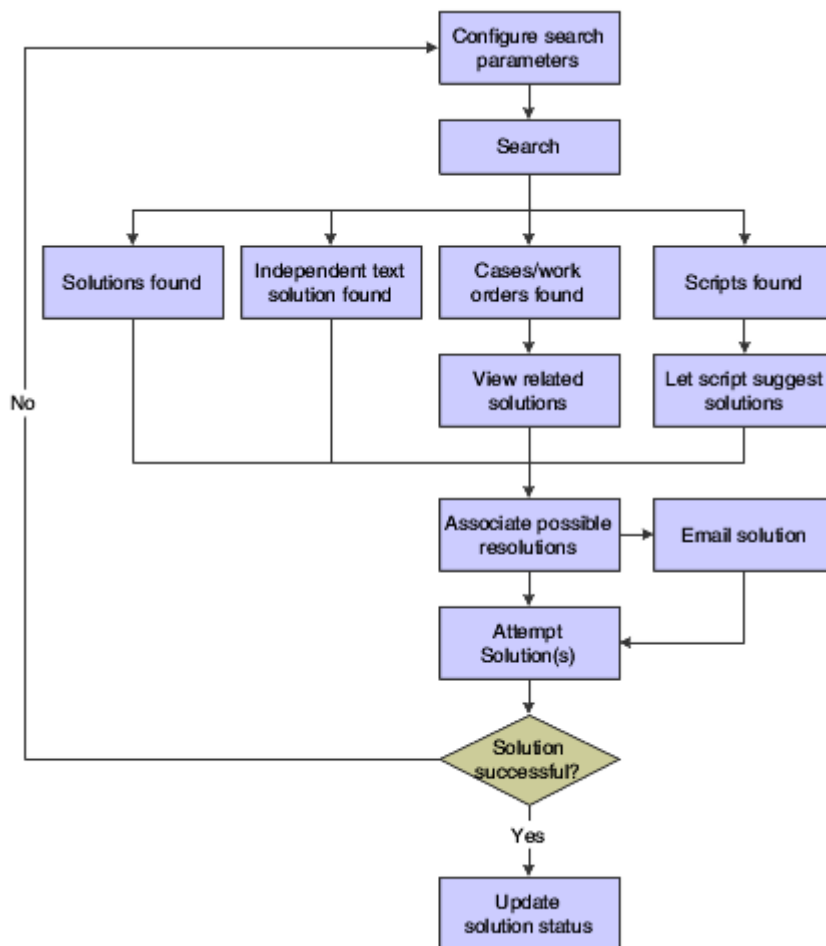
8.4.2 Prerequisites

Before you can search for and assign solutions to cases, a solution administrator needs to:

- Set up Solution Advisor.

- Define solution libraries.

- Define solutions.

- Specify in the S/WM (Service and Warranty Management) System Constants (P17001) for cases to use Solution Advisor.

> **See Also:**
>
> - Setting Up Solution Advisor.

8.4.3 Common Fields Used in This Section

Display
Select the number of records that are displayed. The system searches only until it reaches that amount. For example, if you select 25 rows, the system searches until it

finds the first 25 records that match the search criteria determined in the Search Solution fields. Click Search to display the results. When a user searches more than one search object (for example, cases and solutions) the selected number of display records for each object are added together to define the upper limit of the search result set.

ID
Click the ID link to review or execute a record included in the search result set.

For example, if solutions appear on the Frequently Used form, you can click the ID link to view the details of the Solution record. On the Advanced Search form, you can click the ID of a result set record to view the details of solutions, work orders, and cases. If you search for scripts, you can execute a script by clicking the script ID.

Select
Select a solution from the Attempted Solutions form to send the solution to the customer through email. You can select up to five solution records at a time.

When you assign solutions to the case from the Frequently Used, and Search forms, those solutions appear in the Attempted Solutions grid on the Attempted Solutions form.

Solution ID
Enter the unique identification number assigned to the solution in the Solutions program. On the Attempted Solutions form, you must enter a solution ID and then click the Assign Solution button to assign the solution to the case.

Solution Summary
Enter solution summary information in this field to search for possible solutions. You define this field when you set up solutions to enable searches.

8.4.4 Form Used to Work with Solutions

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry	Review case information.
		Search for and select the case.	

8.4.5 Assigning Solutions to a Case

Access the Manage Case form. Select the Solutions tab.

Figure 8–6   Manage Solutions for Case {number} form (1 of 2)

Figure 8–7   Manage Solutions for Case {number} form (2 of 2)

Use this form to view solutions that have been assigned to the cases and access the email application that enables users to send solutions to customers. You can assign solutions from the Search, Frequently Used, and Create New forms; however, you must always return to the Attempted Solutions form to view the list of solutions that you have associated with the case and to send selected solutions to the customer.

Resolution Status
Enter **SR** (successful resolution) in the Status field of an attempted solution record; the system populates this field. The value appears by default from the Status field of the updated solution record in the Attempted Solutions grid.

Resolution Summary
Enter **SR** (successful resolution) in the Status field of an attempted solution record; the system populates this field. The value appears by default from the Solution Summary field of the updated solution record in the Attempted Solutions grid.

Resolution Detail
Enter **SR** (successful resolution) in the Status field of an attempted solution record; the system populates this field. The value appears by default from the Details field of the updated solution record in the Attempted Solution grid.

Status
Select a solution status from UDC 90CE/AS. When solutions initially appear on this list, they have a status of **IC** (in consideration).

To specify that a solution has resolved the case, enter **SR** (successful resolution) in the Status field of the appropriate attempted solution record. When you enter **SR,** the system updates the Resolution Status, Resolution Summary, and Resolution Detail fields. After you assign a solution with a status *SR*, you cannot change the status of other solutions.

If you determine that a solution does not resolve a case after you have assigned it a status **SR**, reopen the case, click Resolution Failed and the system returns the solution to the Records area of the form with a status **FR** (failed resolution). You can then assign another solution to the case and edit the status of other solutions, including the solution that you marked as a failed resolution.

> **Note:** After you assign a successful solution for a case, the case status is updated to **999** (complete or closed). You must reopen the case by updating the Case Status field on the Case Update form before you can change the solution status.

8.4.6 Sending Solutions

Access the Email form by selecting up to five attempted solutions and clicking the Email Selected Solution(s) button.

You can send solutions to distribution lists or individuals that are set up in the system, or you can add external email addresses to forward solutions to additional contacts. To display the Email form, you must select solutions and click Email Select Solution(s) on the Attempted Solutions form.

When you assign solutions to the case, you must first click Save Changes to display the Email Select Solution(s) button. The email address of the contact listed on the case appears by default in the External Address grid of the Email application.

8.4.6.1 Detail

Create activity for contacts
Select this field to create an activity in the Activities program for the contact.

See Entering Activities for a Case.

Body
Enter additional text or edit default text. The email message consists of this text.

Email Group Lists
Select a group. If you have set up email distribution lists, click Add Email Group to search and to select additional groups that receive the details of the selected solution records.

Person List
Select the individuals who receive the solution. If individuals are set up in the system, click Add Person to search for and select individuals.

External Email
Enter additional email addresses to forward solutions to individuals not listed in the Person or Group lists. The email address for the case contact appears by default.

See "Using Email and Mail Merge" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*.

8.4.7 Reviewing Frequently Used Solutions

Access the Frequently Used form. Click the Frequently Used link on the Solutions tab.

Use this form to search for solutions associated with an item. If you complete the Inventory Item Number field on the Case Entry form, the Frequently Used form displays the list of solutions that have solved cases or work orders associated with the same item number as the current case record. The solutions listed on this form are sorted in descending order based on the total number of cases and work orders that the solution has solved.

If no results appear on this form, you cannot search for additional solutions; however, you can use the Query By Example (QBE) line to narrow the results if the item is associated with numerous solutions.

Solved Count
Enter a number to search for a specific solved count. This field records how many cases and work orders the solution has solved.

8.4.8 Searching for Solutions to a Case

The Solution Basic and Advanced Search program (P90CE030) is a search utility supported by Secured Enterprise Search (SES). This program supports expanded functionality in the Case Entry program (P17500).

8.4.8.1 Forms Used to Search for Solutions to Cases

Form Name	FormID	Navigation	Usage
Work With Case Management	W17500A	Daily Support Processing (G90CE01), Case Entry	Search for Cases.
		Search for and select the case.	
Manage Solutions	W90CG501J	Search for and select a case	Conduct basic and advanced searches for solutions.

> **Note:** It is recommended to set an upper limit of 100 records for the views used by P90CE030
>
> program.

Access the Manage Case form. Click the Search link on the Solutions tab.

You can conduct basic and advanced searches. When you click the Search link, the default form, the Basic Search form, appears.

Figure 8–8   Basic Search
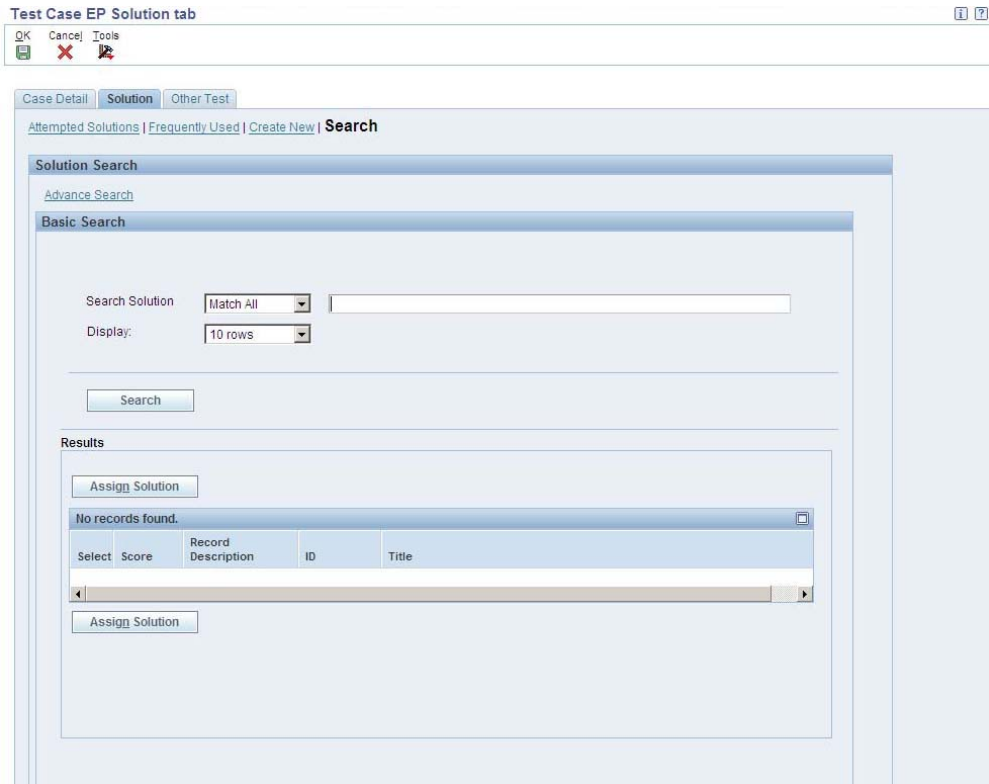
8.4.8.2 Basic Search

Search Solution
Select criteria from this list to conduct the search and then enter text to search for a solution. This list searches the Solution Summary, Solution Details, and Symptoms Description fields. Values are:

Keywords (s)
Enter the type of search to run. Values are:

Generic Query: Searches for a simple key phrase with SES specific qualifiers. Example: Fuzzy Search, Crisms~ will search for word "Christmas".

Match All: Place an *AND* between the words entered.

Match Any: Place an *OR* between the words entered.

Match Exact: Runs a query that includes only the combination of words in a particular sequential order.

Score
Review the value in this field to determine which solution best matches the search criteria. The system displays score values in whole numbers from zero to 100. Typically, the results with the highest score value are most valuable.

8.4.8.3 Advanced Search

Access the Advanced Search form. Click the Advanced Search link.

Select the appropriate option to activate the desired search fields. You can search by multiple items. For example, select Case and Solution to search using both areas. You

must conduct the search in one transaction. You cannot conduct a search on solutions and then conduct a search on cases to have the system combine the results.

Figure 8–9
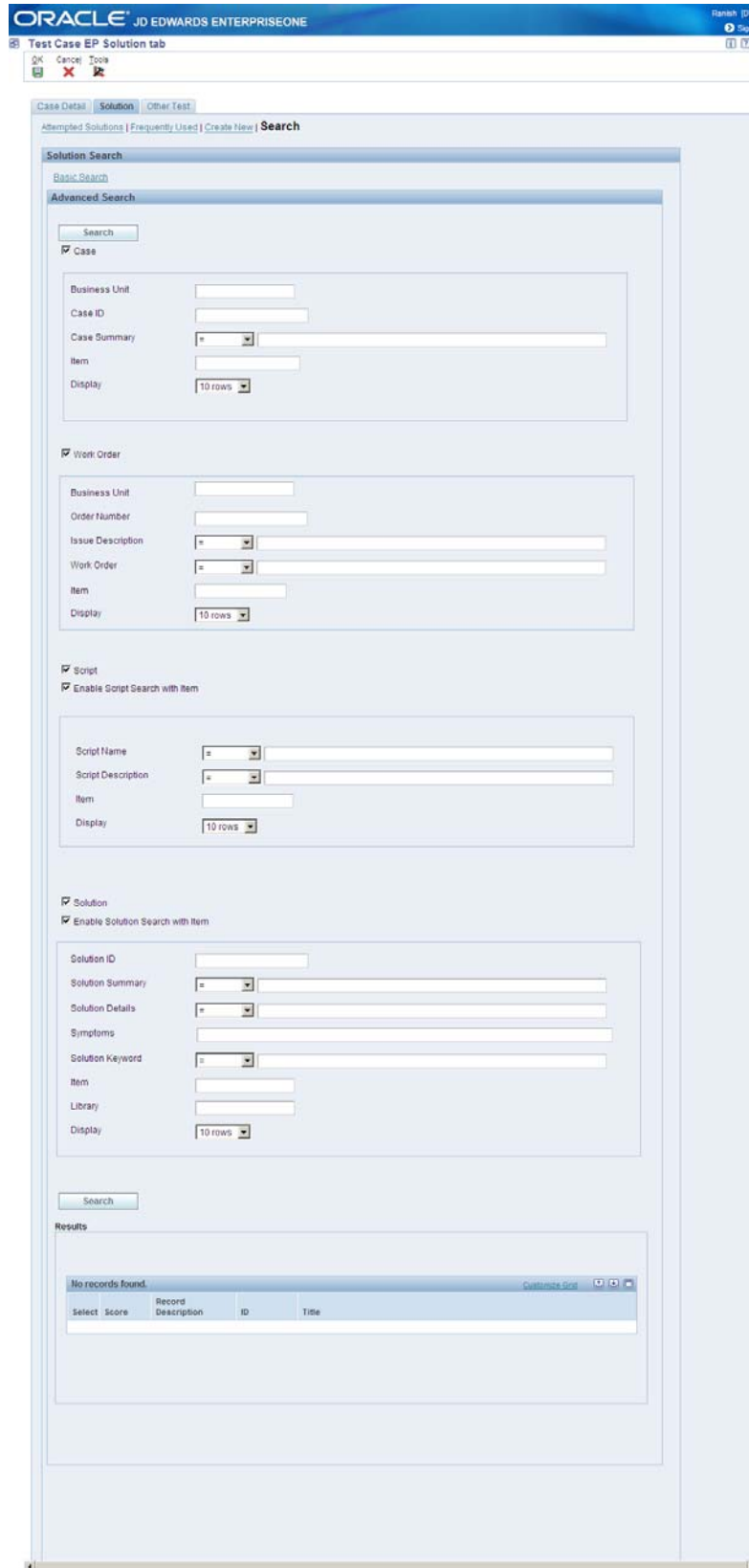
Case

Select this option to activate the case related search fields. A case enables you to capture the details of customers' problems and provides a process for tracking cases from creation to resolution. You can also attach either internal and external messages or documents to a case using media objects.

Business Unit

Enter text in this field to identify a separate entity within a business for which you want to track costs, for example, a warehouse location, job, project, work center, or branch/plant. The Business Unit field is alphanumeric. Business Unit Security can prevent you from inquiring on business units for which you have no authority.

Case ID

Enter the number to search for the solutions that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on.

Case Summary

Enter a description of the customer issue. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Item

Enter an item number to search for solutions, scripts, cases, or work orders that are associated with the item.

Note: You can use the item field to search for cases, work orders, scripts, and solutions.

Display

Enter a row number to display the search for solutions, scripts, cases, or work orders associated to the search solutions.

Note: You can use the Display field to search for cases, work orders, scripts, and solutions.

Work Order

Select this option to activate the work order related search fields. Work orders enable you to track all of the necessary phases of the work to resolve a customer's issue, from scheduling a technician to the technician's arrival and successful completion of the work.

Business Unit

Enter a text in this field 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.

Order Number

Enter the number of work orders for which you want the solutions that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on.

Issue Description

Enter a description of the customer issue. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Work Order
Enter a user-defined name or remark. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Script
Select this option to activate the script related search fields. A script is a predefined set of questions or statements that are joined together in a specific order and used to gather information from respondents. When the script is processed, which is known as runtime, a questioner follows the script and records the respondent's answers.

Enable Script Search with Item
Select this option to activate the script search with item related search fields. The Enable Script Search with Item check box enables you to activate the Item Number field. Use the Item Number field to enter an item number in the applicable area to search for scripts associated to an item.

Script Name
Enter the name of the script. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Script Description
Enter text in this field to search for a branch script record based on the script's detailed description. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Solution
Select this option to activate the solution related search fields. Solutions are records of known resolutions that can assist agents or customers issues. Each solution record stores a number of attributes designed to help you locate a solution quickly or to resolve the issue.

Enable Solution Search with Item
Select this option to activate the Enable Solution Search with Item related search fields. The Enable Script Solution with Item checkbox enables you to activate the Item Number field. Use the Item Number field to enter an item number in the applicable area to search for solutions associated to the item.

Solution ID
Enter a system-defined number that uniquely identifies each solution record that you create. The system generates the solution ID after the user successfully saves the solution record for the first time.

Solution Summary
Enter a summary of the solution details and content. The Solution Summary field is available for searching via the solution advisor basic and advanced search functionality. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Solution Details
Enter a detailed description of the solution record and the steps that user must complete to resolve the issue. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Symptoms
Enter a textual description of the symptoms that may be causing the problem identified by the caller. The solution details are designed to address and resolve the symptoms listed in this field. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Solution Keyword
Enter a summary of words or phrases that is valuable when searching for the solution record. Values are:

=: Is Equal to.

! =: Not Equal to.

Contains: Have within.

Library
Enter a solution library. When you set up solutions, you can add a level of organization to solutions by creating libraries to group solutions.

Score
Review the value in this field to determine which solution best matches the search criteria. The system displays score values in whole numbers from 0 to 100. Typically, the results with the highest score value are most valuable.

Record Description
Review the type of record. This field specifies whether the result is a case, work order, solution, or script. You can assign solutions to cases only; however you can access work order, case, or script records through the ID field to determine the solution.

This field enables you to search for and run a script. If you run a script, the Related Actions tab records a script instance for the script.

See Also:

- Entering Basic Case Information.

- Setting Up and Managing Scripts.

- Entering and Reviewing Related Actions.

- "Managing Work Orders" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

- Setting Up Solution Advisor.

8.5 Entering Activities for a Case

This section provides an overview of activities and discusses how to enter activities for a case.

8.5.1 Understanding Case Activities

Often, an agent must assign issues to other team members in order to resolve a customer's problem. Activities track case-related actions, such as meetings, tasks, and to-dos. Activities appear on the calendar control, enabling users to manage their daily activities. To manage cases, add activities (such as messages or calendar items) to a case through the Case Activities program, which you access on a tab off the Case Revisions form.

See Also:

- "Using Foundation Calendar" in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*.

8.5.2 Forms Used to Enter Activities for a Case

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry	Review case information.
		Locate and select the case on the Work With Case Management form and click Select.	
Manage Activities	W90CG510B	Select the Activities tab on the Manage Case form.	Review case activities.
		Alternatively, select Daily Support Processing (G90CE01), Activity.	
Add Activity	W01301B	Click Add Activity on the Manage Activities form.	Add case activities.

8.6 Entering and Reviewing Related Actions

This section provides an overview of related actions and discusses the forms used to relate actions to a case.

8.6.1 Understanding Related Actions

You can attach these objects to a case:

- Equipment work order

- Sales order

- Lead

- Quote

- Script

- RMA

- Service Work order

Use the Related Actions program (P90CG503) to create and associate objects, such as sales orders, quotes, service work orders, equipment work orders, leads, scripts, and RMA to a case. You can then access the revision forms for these related actions through links on the form. These associations to the case are in the F90CG503 table, which records the case or work order number, association type, lead ID, RMA number, and script ID.

8.6.1.1 Relating a Script to a Case

If the organization uses scripting, you use the Script Runtime program (P90CF180) to guide you through a case solution. A script is a predefined set of questions or statements that are joined in a specific order and used to gather information from respondents. You can use branch scripts or linear scripts to find a solution to an active case.

If you use branch scripts, the system displays different questions based on the answers provided by the respondent. Linear scripts present the same questions and responses to each respondent, regardless of the answers to previous questions. Scripts enable you to find the proper solution for a case.

You can access scripts by using either the Related Actions tab or the Solutions tab.

> **See Also:**
>
> - Working with Solutions.
>
> - Setting Up and Managing Scripts.

8.6.2 Forms Used to Relate Actions to a Case

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Locate and select the case on the Work With Case form and click Select.	Review case information.
CRM Case Related Actions	W90CG503B	Click the Related Actions link on the Manage Case form.	Enter related actions, such as equipment work orders, service work orders, sales orders, leads, quotes, RMAs, and scripts.

See Also:

- Setting Up and Managing Scripts.

- Working with Solutions.

- "Entering Sales Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

- "Generating Returned Material Authorization" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

- "Managing Work Orders" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

- "Processing Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*.

8.7 Entering Comments (Attachments)

This section provides an overview of comments and lists the forms used to enter comments.

8.7.1 Understanding Comments

Use the Attachments form to enter case comments. On this form, you can specify whether comments are external comments (which are visible to both the customer and the organization) or internal comments (which are visible only within the organization). You can then define customer reports that include only external comments.

8.7.2 Form Used to Enter Comments

Form Name	FormID	Navigation	Usage
Case External Attachment	W90CG509A	Daily Support Processing (G90CE01), Case Entry Locate and select the case on the Work With Case form and click Select. Click the Attachments link on the Manage Case form.	Enter internal and external comments for the case by using the Attachments tab.

8.8 Creating Tasks

This section provides an overview of tasks and discusses how to create a task.

8.8.1 Understanding Tasks

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

You cannot assign the same case to multiple users. However, you can assign the associated tasks to multiple people and assign case ownership to one person. You can assign tasks as needed to other users who assist in resolving the case.

8.8.2 Forms Used to Create Tasks

Form Name	FormID	Navigation	Usage
Work With Tasks	W17504A	Daily Support Processing (G90CE01), Case Entry	Work with case tasks.
		Locate and select the case on the Work With Case form and select Work With Tasks from the Row menu or select the folder button.	
Task Revisions	W17504B	Click Add on the Work With Tasks form.	Set up and assign tasks to associate with the case.
			Note: You can also attach a task to a case; on the Manage Case form, click the Related Links link.

8.8.3 Creating a Task

Access the Task Revisions form.

Figure 8–10 Task Revisions form
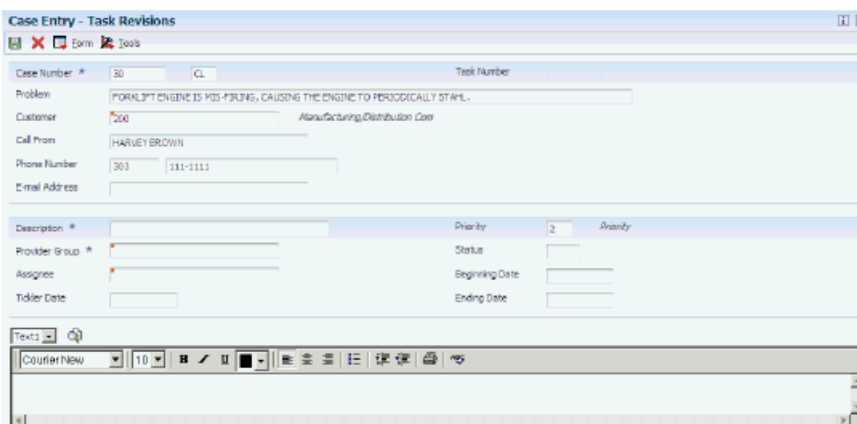
Case Number
Enter the case number. The Problem, Customer, and Call From field values appear by default from the case.

Description
Enter a value from UDC 17/TN to specify the task.

Provider Group
Enter the provider group number to assign the task to a provider group.

Assignee
Enter the Address Book number to assign the task to an assignee.

If you click the visual assist, the Distribution List form appears, and you can select a distribution list; you cannot search for individual Address Book records.

8.9 Using the Case History Form

This section provides an overview of case history and lists the forms used to access case history.

8.9.1 Understanding Case History

Access the Case History form to review case information changes such as caller, assignee, provider group, and so forth. From the Work With Case History Form menu, you can access failure analysis information associated with the case and work center.

> **Note (Release 9.1 Update):** You can also access the Case History program from the Row menu of the Work With Case Management form of the Case Entry program (P17500). This option of accessing the Case History program is helpful if you are using the Speed Case Entry program (P90CG601) to enter and update cases because the History link is not available in the Speed Case Entry form.

8.9.2 Forms Used to Access Case History

Form Name	FormID	Navigation	Usage
Work With Case History	W17500A	Daily Support Processing (G90CE01), Case Entry Search for and select a case.	Review case information. Click the History link to review case history.
Work Center	W012503F	Select Work Center from the Form menu on the Work With Case History form.	Review work center information.
Work With Failure Analysis	W17766C	Select Failure Analysis from the Form menu on the Work With Case History form.	Review failure analysis information. See "Working with Failure Analysis" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*.

8.10 Using Related Links

This section provides an overview of related links and lists the forms used to access related links.

8.10.1 Understanding Related Links

By clicking the Related Links link on the Case Entry program, you can specify each part of a case that you want to review. You can access multiple contact, customer, supplier, employee, item, equipment, and contracts programs by clicking this link.

> **Note (Release 9.1 Update):**   You can also access related programs (contact, customer, supplier, case time entry, item/equipment, contracts, supplemental data, and case history programs) from the Row menu on the Work With Case Management form of the Case Entry program (P17500). This option of accessing related programs from the Work With Case Management form is helpful if you use the Speed Case Entry program (P90CG601) because you cannot access the related programs from the Speed Case Entry form.

8.10.2 Form Used to Access Related Links

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Search for and select the case.	Review case information. Click the Related Links link and then select the application that you want to access.

8.11 Entering and Updating Cases Using the Speed Case Entry Program (P90CG601) (Release 9.1 Update)

This section provides an overview of speed case entry and discusses how to enter and update cases using the Speed Case Entry program (P90CG601).

8.11.1 Understanding Speed Case Entry

The Speed Case Entry program is a simplified and alternative program to the Case Add program (P90CG504) and the Case Update program (P90CG501). The add and update mode of the Speed Case Entry program contains logical grouping of fields in nine collapsible groupboxes. You can click the Tab key to easily move across fields from top to bottom and from bottom to right in the same groupbox. If you click the Tab key in the last field of a groupbox, the cursor moves to the next groupbox that is in expanded state.

You can set processing options in the Case Entry program (P17500) to use the Speed Case Entry program (P90CG601) to add a new case or update an existing case. You can set processing options to collapse or expand eight of these nine groupboxes before you load the Speed Case Entry program:

- Case header: The title of this groupbox displays the case number. By default, this groupbox is collapsed in add mode and expanded in update mode. You cannot control the state of this groupbox through processing option.

- Customer

- Issue Description

- Attachments

- Case Detail

- Product Information

- Category Codes

- Additional Information

- User Reserved Fields

If you enter incorrect information in the fields, the system displays the links of the errors at the top of the form. If you click on an error link, the system expands the groupbox (if it was collapsed earlier) that has the field with the error.

Access Related Actions information using a button in the Case Revisions form to view existing related actions or add new related actions.

Note: You can access case history and related links programs from the Row menu on the Work With Case Management form.

8.11.2 Forms Used to Enter and Update Cases Using Speed Case Entry Program (P90CG601)

Form Name	FormID	Navigation	Usage
Work With Case Management	W17500A	Daily Support Processing (G90CE01), Case Entry (P17500)	Search for and review existing cases.
Speed Case Entry	W90CG601B	Click Add on the Work With Case Management form.	Enter case details.
Case Revisions	W90CG601B	Select a case and click Select on the Work With Case Management form.	Update case information. Access the Related Actions form through the Related Actions button.

8.11.3 Updating Cases Using the Speed Case Entry Program

Access the Case Revisions form.

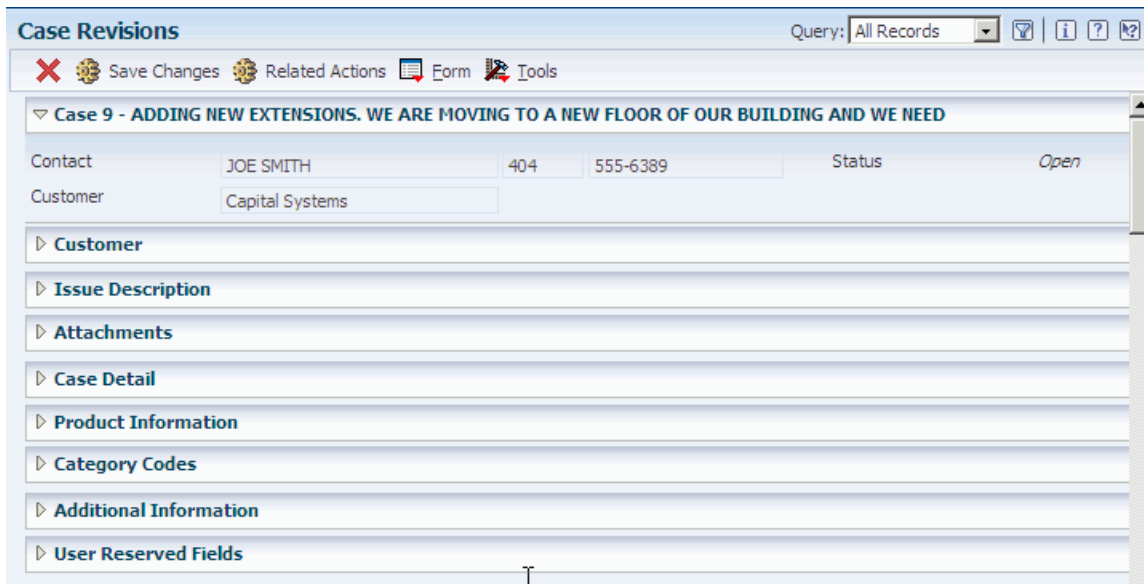*Figure 8–11   Case Revisions form: groupboxes in collapsed state (1 of 5)*

Figure 8–12   Case Revisions form: Case, Customer, and Issue Description groupboxes in expanded state (2 of 5)

The Case Revisions form contains nine collapsible groupboxes. You can set processing options to collapse or expand eight groupboxes in both the Add and Update mode of the Speed Case Entry program before you load the program:

8.11.3.1 Case header

The system populates the fields in this groupbox with the customer's name, customer's phone number, and the status of the case in the Case Revisions form. These fields do not have any values in the Speed Case Entry form.You cannot edit these fields in add and update mode.

8.11.3.2 Customer

The Customer groupbox includes fields that you can use to enter the customer's address book number, number of call backs for the case, caller's name, caller's address book number, phone number, and email address of the person associated with the case. The customer number appears by default in the Caller Number field. If the customer does not exist in the Address Book, click the Quick Add link and add the customer information. If the caller does not exist in the Address Book, click the ellipsis (...) link and add the caller information.

8.11.3.3 Issue Description

The Issue Description groupbox includes the Problem field that you can use to enter the description of the problem and the Reason field that you can use enter the reason for the problem. The system displays the Failure Code field if:

- You have selected the Failure Analysis Tree for Selecting Failure Analysis Codes option in the General tab of the S/WM System Constants Revisions form.

- You have not selected the Use Solution Advisor option in the Case tab of the S/WM System Constants Revisions form.

If you have set the constants to fulfil these conditions, the system displays and locks the Problem field and populates it with the associated description of the failure code that you entered in the Failure Code field. The system uses the failure description as the default value for the problem description and you cannot edit it. You can set the Validate Failure Codes processing option to not validate problem codes against failure codes. Then, you can edit the Problem field and can override the failure description.

If you have not set the constants to fulfil the conditions, the system does not display the Failure Code field and the problem description that you enter in the Problem field is not validated against failure codes.

You can also enter few lines of texts to describe the problem or attach a media object to explain the problem.

Figure 8–13   Case Revisions form: Attachments and Case Detail groupboxes in expanded state (3 of 5)

8.11.3.4 Attachments

The Attachments groupbox includes two tabs, Internal Comments and External Comments. Use the Internal Comments tab to enter comments which are visible only

within the organization and the External Comments tab to enter comments which are visible to both the customer and the organization.

8.11.3.5 Case Detail

The Case Detail groupbox has two sections, the Case Severity section and the Dates/Time section.

8.11.3.5.1 Case Severity: The Case Severity section includes fields that you can use to enter the case priority code, the case type, case status (Open, Active, and so forth), and the parent case number.

This groupbox also includes two buttons:

- **Advance Status**: You can use the Advance Status button to easily update the status of a case after you have finished working on it. When you click this button, the system advances the case status with the next status based on the case activity rules and displays the text of the next status on the button. If case status activity rules are not applicable for your case or if the status is complete and no more statuses are available, then the system does not display this button.. Even if the button does not appear, you can use the Case Status field to manually select a status.

    See Setting Up Activity Rules.

- **Cancel Case**: You can use the Cancel Case button to automatically cancel the case. You can set a processing option to define the value to use for cancelled status.

You can also define the fields that you must enter information before the system advances a case to the next status in the queue. You can define required fields on specific request document types, request queues, and request types; or you can set required fields to cover all document types, queues, and request types. The system uses the Check required fields processing option in the Process tab of the Case Master Business Function program (P90CG002) processing options to determine whether to check required fields when advancing a status.

8.11.3.5.2 Dates/Time: The Dates/Time section includes fields that you can use to provide information of when the job was executed, when the service provider arrived at the customer site, the commitment date and time, the time zone defined in the service provider information, and the commitment duration.

Figure 8–14   Case Revisions form: Product Information and Category Codes groupboxes in expanded state (4 of 5)

8.11.3.6 Product Information

The Product Information groupbox includes fields that you can use to enter the equipment number, inventory item number, branch plant or lot number, product model, product component, and the operating environment.

8.11.3.7 Category Codes

The Category Codes groupbox includes category codes fields from one to ten that you can use for cases or equipment.

Figure 8–15   Case Revisions form: Additional Information groupbox in expanded state (5 of 5)

8.11.3.8 Additional Information

The Additional Information groupbox includes additional case information in the groupbox header and four sections:

8.11.3.8.1   Accounting Information: The Accounting Information section includes fields that you can use to enter the business unit for which you want to track costs and values (from UDC 41/9). The system uses the business unit to identify the general ledger offset that the system uses when searching for the account to post the covered and non-covered portion of the accounting transaction.

8.11.3.8.2   Partner: The Partner section includes fields that you can use to enter the partner's address book number and phone number.

8.11.3.8.3   Provider Group: The Provider Group section includes fields that you can use to enter the following:

■   Address book number of the provider group to assign the task to a provider group.

■   Assignee address book number to assign the task to an assignee

■   ACD (automatic call distributor) phone number to search for the address book number of an entity using a phone number.

8.11.3.8.4   Contract Information: The Contract Information section includes a field that you can use to enter the contract number and the Entitlement Check icon that you can click to perform entitlement checking. The system provides the results of the entitlement check, the coverage group, and the service package type to which the customer is contractually entitled.

8.11.3.9 User Reserved Fields

The User Reserved Fields groupbox includes fields that you can use to reserve a number, code, amount, date, or reference specifically for your use. You can set a processing option to hide this section.

> **See Also:**
>
> - For detailed explaination of the fields in the Case Revisions and the Speed Case Entry forms, see the Entering Basic Case Information.
>
> - Setting Processing Options for Speed Case Entry (P90CG601) (Release 9.1 Update).

8.12 Entering and Reviewing Related Actions for Speed Case Entry (Release 9.1 Update)

This section provides an overview of related actions and discusses the forms used to relate actions to a case for speed case entry.

8.12.1 Understanding Related Actions for Speed Case Entry

You can access the Related Actions program (P90CG602) from the Speed Case Entry program (P90CG601) to create and associate objects to a case. The Case Revisions form includes the Related Actions button that you can click on to access the Manage Related Actions form. This button is available only in the Case Revisions form and is not available in the Speed Case Entry form.

You can attach these objects to a case:

- Equipment work order

- Sales order

- Lead

- Quote

- Script

- RMA

- Service work order

The system displays the status of each type of related action in the grid along with the associated description. The system does not display a status for sales order transactions and sales quotes because they do not have statuses.

8.12.2 Forms Used to Relate Actions to a Case for Speed Case Entry

Form Name	FormID	Navigation	Usage
Work With Case Management	W17500A	Daily Support Processing (G90CE01), Case Entry (P17500)	Search for and review existing cases.

Form Name	FormID	Navigation	Usage
Case Revisions	W90CG601B	Daily Support Processing (G90CE01), Case Entry (P17500) Select a case and click Select on the Work With Case Management form.	Update case information. Access the Related Actions form through the Related Actions button.
Manage Related Actions	W90CG602A	In the Case Revisions form, select a case and click the Related Actions button.	Enter related actions, such as equipment work orders, service work orders, sales orders, leads, quotes, RMAs, and scripts.

9

Working with Escalations

This chapter contains the following topics:

- Section 9.1, "Escalating (Promoting) Cases"
- Section 9.2, "Managing Case Escalations Using Skill-Level Escalation Processing"

9.1 Escalating (Promoting) Cases

This section provides overviews of escalation using notification method and escalation using skill-level method, and lists a prerequisite.

You determine the escalation method by using the Case tab in the S/WM System Constants program (P17001).

See Setting Up Case Management Fundamentals.

9.1.1 Understanding Escalation Using Notification Method

Use the workflow tools in the JD Edwards EnterpriseOne system to streamline the case escalation process and to notify the necessary individuals that the case has been escalated. The system enables you to send email notifications if a case is not closed within a specified period of time. This automates traditionally paper-based tasks with an email-based process throughout the network.

Define workflow structures for each provider group, priority, and level of escalation. Workflow structure setup allows only a single address number at any escalation level. To send the escalation message to multiple people, you must create a distribution list and specify the group within the distribution list at the appropriate escalation level.

When you add a case to the database, the system creates a message within the Work Center (P012501). This message is placed in a mailbox at the provider group level or at the assignee level. If you have defined routing rules, the system assigns the case to the provider group or individual that you assigned in these rules. After the system makes the provider group assignment, it calculates the case commitment date and time by analyzing entitled (service contracts) and unentitled records (which are case type and priority records), workday calendars, and threshold hours. Based on the provider group setup, the case type, and the priority information defined in the Provider Group Revisions program (P17506), the system updates the case record with the escalation date and time and an escalation level of 1. All escalation date and time calculations are based on the commitment date and time that the system calculates using the provider group or contract information. When you run the Escalation processing program (R17680), the system checks for cases requiring escalation.

When the escalation time expires, the system can increase the priority of the case and send notification messages to the provider group members (the distribution list) if the

case is assigned to a provider group, or it can send a message to the assignee if the case is assigned to an individual. The system updates the escalation level for the case and awaits a status change, the next level of escalation, or notification. At each escalation level, the system uses the escalation percentage values defined in the F1753 table and the time remaining in the time-to-close to calculate the escalation interval. When you close the case or reach the end of the escalation levels, the case is no longer eligible for escalation.

9.1.2 Understanding Escalation Using Skill-Level Method

If you decide to escalate cases using the skill-level method and have set up routing rules, the system assigns a provider group and an assignee to the case based on the routing rules that have been created. After the system makes the provider group assignment, it calculates the case commitment date and time by analyzing entitled records (that is, service contracts) and unentitled records (case type and priority records), workday calendars, and threshold hours. The escalation routine then assigns the initial provider group member to the case by reviewing and comparing workloads and skill levels of provider group members

If an assignee is assigned by the routing rules or manually assigned to the case and the assignee is a member of the provider group, the case remains with that assignee until the escalation interval expires. The escalation routine does not process the initial assignment. The case's initial assignee is usually the provider group member with the lowest skill-level value and the fewest number of assigned cases.

At case entry, the system calculates the escalation start event, escalation warning event, and escalation event. The system uses the values defined in the F1753 and F90CG506 tables to assign and process the case through the provider group members assigned to the case. The F90CG506 table stores the assignees and skill levels; the F1753 table stores the escalation percentage values. The values in these tables determine when and for how long a provider member works on a case.

Using the values in the F1753 table, the case escalates through provider group members until the case reaches Closed status or the list of provider group members is exhausted. The most skilled provider group member remains as the assignee if there are not enough provider group members to continue escalating the case. The provider group manager receives all past due notifications for all unresolved cases.

9.1.2.1 Skill-Level Escalation Example

In this example, Provider Group 1 receives a critical priority case.

The F1753 table contains these escalation values for this case priority (critical) for this provider group:

- Escalation percentage: **25**

- Escalation warning percentage: **25**

- Resolution warning percentage: **13**

The system determines that the time-to-close is eight hours (or 480 minutes) by using this calculation:

(JD Edwards EnterpriseOne commitment date and time) –(case created date and time)

This graphic illustrates how the system processes the case using skill-level escalation:

Figure 9–1 Skill-level escalation processing
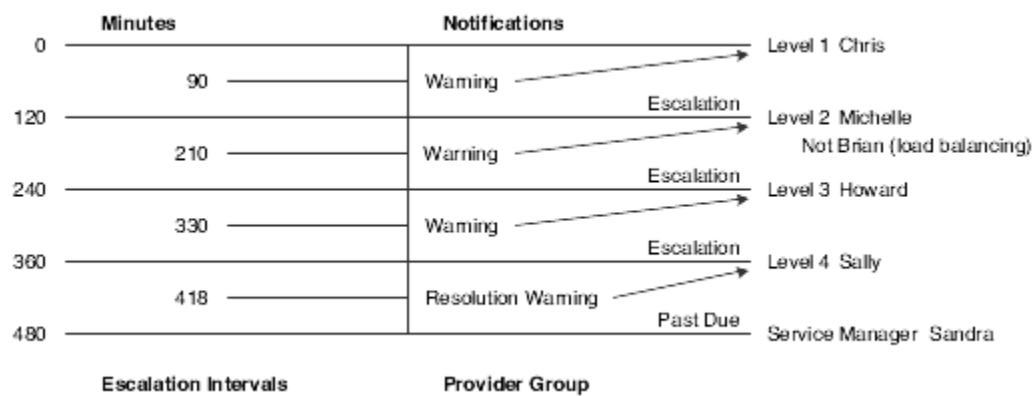
Each provider group member assigned to the case, has 120 minutes to work on the case before it is escalated to the next skill level. Because of load balancing, the employee named Brian does not receive this case. The system sends escalation warning messages when 30 minutes remain in each escalation interval, and the current assignee receives the message. A resolution warning message is generated when 62 minutes remain in the escalation interval, and Sally receives the resolution warning message. If the case is not resolved within the commitment time, Sandra, the service manager, receives the unresolved case.

9.1.3 Prerequisite

If you are processing escalations using the notification method, ensure that you have:

- Installed the Workflow Modeler so that you can use escalation workflow.
- Set up the S/WM system constants for Escalation 1 (escalation using notification).
- Defined provider groups and associated distribution lists.

If you are processing escalations using the skill-level method, ensure that you have:

- Set up S/WM system constants for Escalation 2 (escalation using skill level).
- Defined provider groups and associated provider group members and skill levels.

Note these considerations when escalating cases:

- Escalation is based on the date and time when a case is first entered and each time that it is escalated.
- Dates and times are based on specific escalation setup for each provider group and priority, or they are based on the generic escalation setup for all provider groups and each priority.

See Also:

- Setting Up Provider Groups.
- Setting Up Case Priorities Using Notification Escalation Method.
- Setting Up Priorities Using Skill-Level Escalation Method.
- *JD Edwards EnterpriseOne Tools Workflow Tools Guide*.

9.2 Managing Case Escalations Using Skill-Level Escalation Processing

This section provides an overview of escalation processing when parameters change.

9.2.1 Understanding Escalation Processing When Parameters Change

At any time in the escalation process, you can reassign the case to another provider group member, change case priority, adjust commitment date and time, or reassign the case to another provider group. When you change any of these variables in the escalation process, the system adjusts escalation intervals accordingly. This section includes examples of changes in processing during escalations and discusses how the system makes adjustments for these changes.

9.2.1.1 Case Reassigned to Another Provider Group Member

You can manually promote the case to another provider group member at any time in the escalation process. When you reassign the case to another provider group member, the new assignee receives a full escalation interval, as long as there is adequate time remaining in the promised response time (also called the *time-to-close*).

You can manually reassign a provider group member by:

- Using the Assignee field to search and select a provider group member.

  You can reassign the case to a provider group member at any skill level, even a skill level lower than the current assignee. If you reassign the case to a provider group member, the system could still escalate the case back to the current assignee after the full escalation interval has passed. For example, suppose that you reassign the case from a provider group member with skill level 3 to a provider group member with skill level 2. After the escalation interval has passed, the provider group member with skill level 3 could receive the case again.

- Clicking the Re-Routing button.

  If you reassign the case by clicking the Re-Routing button, the system uses load-balancing, and it escalates the case to the next available skill level in the provider group.

9.2.1.2 Unavailable Provider Group Member

If a provider group member is marked as unavailable in the Provider Group Employees program, the system automatically reassigns the case to the next provider group member. The unavailable member does not receive an escalation notification. Managers who are marked as unavailable still receive past due notifications.

9.2.1.3 Change in Priority

You may need to reassign the case priority during the case escalation process. For example, you can reduce the escalation percentages to escalate the case more quickly through the skill levels. When the priority changes, the case remains with the current assignee, and the current assignee is given a complete escalation interval based on the new priority. The assignee receives a complete escalation interval regardless of when the case priority changes in the escalation process as long as there is adequate time remaining in the time-to-close.

When you change the priority, the commitment date and time could change, depending on whether a service contract is connected to the case. For example, suppose that you change the case priority from 2 to 1, the case is not attached to a service contract, and different values exist for each priority in the Commit Percentage field in the F1753 table. The escalation interval could change. In this example, the case

remains with the current assignee, who receives a complete escalation interval based on the new priority; however, that interval changes according to the new response date and time. If the new escalation interval is changed from 12 hours to 8 hours and the escalation percentage changes to 25 percent for the new priority, the assignee receives a complete escalation interval of 120 minutes (25 percent of 8 hours) instead of 180 minutes (25 percent of 12 hours).

9.2.1.4 Change in Commitment Date and Time

Because of case severity or change in case priority, you might move the case commitment date and time. When you move the commitment date and time for a case, the current assignee retains the case; however, the assignee receives a full escalation interval based on the new commitment date and time, as long as there is adequate time remaining in the time-to-close. For example, if the initial escalation interval is 8 hours, the escalation percentage is 25 percent, and the current assignee has worked on the case for 20 minutes before the commitment date and time changed the escalation interval to four hours, the current assign retains the case and receive another escalation interval of 60 minutes (25 percent of four hours).

9.2.1.5 Call Center Closed During Escalation

The system continues to escalate cases even when the call center is closed. Depending on the escalation percentages, skill levels might not receive a case because it is escalated while the call center is closed. In this example, the skill level that receives the case when the call center reopens can manually reassign the case to the initial assignee. The initial assignee receives a full escalation interval, as long as there is adequate time in the time-to-close.

9.2.1.6 Not Enough Provider Group Members

Depending on the case load, the case type, and the case priority, the escalation routing could exhaust all of the skill levels. In this example, the case remains with the most skilled member until the escalation time expires, and the case is forwarded to the provider group manager; the system does not process escalations or send escalation notices after the case reaches the highest skill level.

9.2.1.7 Case Reassigned After Resolution Warning Issued

If a case is reassigned after the system issues the resolution warning, the new assignee receives an email message indicating the case commitment date and time, but the assignee does not receive other notifications.

9.2.1.8 Change in Provider Group

You can reassign the case at any time in the escalation process. You might reassign a case to manually adjust workloads. Or after initial investigation, you might determine that the case should be routed to a provider group that specializes in a particular area.

When you reassign a case to another provider group, the system uses load balancing to assign the case to the least skilled member of the new provider group and initiate the escalation process, according to the case priorities defined for the new provider group.

10

Resolving Cases

This chapter contains the following topics:

10.1 Understanding Case Resolution

Resolving a case can include finding an answer to a customer's inquiry or problem or entering a work order because the case requires further support. A case remains in **Open** status until it is resolved. To allow for accurate reporting, you must change the status to **Closed** when a case is resolved. To report time, you access the Time Entry program (P17505) if the activity rules are set up to display the Time Entry form as you are closing the case.

10.2 Entering Service Work Orders for Cases

This section provides an overview of service work orders and lists the forms used to enter service work orders for cases.

10.2.1 Understanding Service Work Orders

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

Depending on the customer request, you may need to first open a case and then create the service work order, or you may be able to create a service work order that is not attached to an open case. If a case cannot be resolved by a consultant, or if a replacement part is required, you can create a service work order.

Use the Related Actions form in the Case Entry program to enter and revise service work orders connected to cases.

See Entering and Reviewing Related Actions.

and

See "Managing Work Orders" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

10.2.2 Forms Used to Enter Service Work Orders for Cases

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry	Review cases.
		Select a case and click Select.	
CRM Case Related Actions	W90CG503B	Select the Related Actions tab on the Manage Case form.	Review a list of related actions connected to the case.
Add Work Order	W90CD002A	On the CRM Case Related Actions form, select Work Orders as a related action, and click Add.	Enter a service work order related to the case.

10.3 Closing Cases

When you resolve a case, you must change the status of the case to close it. After you close the case, you might also need to enter time to bill the customer accurately.

This section discusses how to close a case.

> **Note:** Depending on how the system is set up, the status of the issue might not require you to manually change the case to closed. Instead, the system might close the case.

10.3.1 Form Used to Close Cases

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry	Close the case.
		Select a case and click Select.	

10.3.2 Closing a Case

Access the Manage Case form.

Case Status

Enter a value from UDC 17/ST to specify that the case is resolved.

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

10.4 Charging Time to Cases

This section provides an overview of case time entry, lists prerequisites, and discusses how to charge time to a case.

10.4.1 Understanding Case Time Entry

When you resolve a case, you must enter time to accurately record the amount of time spent on the case for billing purposes. If you have contract and warranty agreements

with customers who do not require billing by the hour, you still might need to report the time for accounting purposes. You can set the processing options to create either payroll batch transactions or general ledger transactions.

Activity rules determine which stages of a case require time entry. You can set up the system to display the Time Entry form at any status change or only when the case is closed.

When you enter a case, the system calculates time entry information based on the time that you accessed the Add Case form and the time that you exited the form. You can override the information, if necessary.

The three methods for using the Case Time Entry program are:

1. Not using case billing with time entry for reporting purposes only.

2. Using case billing with the flat rate pricing method.

3. Using case billing with the time and materials pricing method.

The fields vary on the Case Time Entry form depending on which method you use. When case billing is not used, the fields are identical to flat rate billing except the Uploaded to Table and Date Uploaded fields do not appear.

> **Note:** If the case has already been billed, you cannot change the billing information.

10.4.2 Prerequisites

To access billing information and enter billable time, you must:

■ Activate the Bill for Cases processing option for the Case programs.

■ Set up the case activity rules to define at what status the time entry form displays.

See Setting Up Processing Options for Case Management.

and

See Setting Up Activity Rules.

10.4.3 Form Used to Charge Time to Cases

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry	Enter time information.
		Locate the case and click Select.	
		Change the case status to a status that displays the time entry form.	

10.4.4 Charging Time to a Case

Access the Case Time Entry form.

Figure 10–1   Case Time Entry form

Service Provider Number

Enter the service provider's address book number. If you enter a value other than the address book number, such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the address book number in this field.

Cost Type

Enter the code that designates each element of cost for an item. Examples of the cost object types are:

A1: Purchased raw material.

B1: Direct labor routing roll-up.

B2: Setup labor routing roll-up.

C1: Variable burden routing roll-up.

C2: Fixed burden routing roll-up.

Dx: Outside operation routing roll-up.

Xx: Extra add-ons, such as electricity and water.

The optional add-on computations usually operate with the type *Xx*. This cost structure enables you to use an unlimited number of cost components to calculate alternative cost roll-ups. The system then associates these cost components with one of six user defined summary cost buckets.

Actual Hours

Enter the number of hours associated with each transaction.

Labor Unit of Measure

Enter a value from UDC 00/UM to identify the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

Costing Rate

Enter the employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the F060116 table.

In the F060116 table, this number is the employee's base hourly rate.

In the F069126 table, this number is the straight time rate.

> **Note:** If you change the number of the data display decimal digits for this field, you must also change the Rate - Base Hourly and Rate - Hourly fields so that they have the same number of data display decimal digits.

Scheduled Start Date
Enter the start date for the work order. You can enter this date manually or have the system calculate it using a backscheduling routine. The routine starts with the required date and offsets the total leadtime to calculate the appropriate start date.

Start Time
Enter the amount of time that has elapsed between the date and time that you entered the case and the date and time that you assign the case.

End Date
Enter the date that the work order or engineering change order is completed or canceled.

End Time
Enter the amount of time that has elapsed between the date and time that you enter the case and the date and time that you assign the case.

Account Number
Enter the value that identifies an account in the general ledger. Use one of these formats to enter account numbers:

Standard account number (business unit.object.subsidiary or flex format).

Third general ledger number (maximum of 25 digits).

Account ID number; the number is eight digits long.

Speed code, which is a two-character code that you concatenate to the AAI item; you can then enter the code instead of an account number.

The first character of the account number indicates its format. You define the account format in the General Accounting constants.

The system retrieves the account number based on the account number that was set up for a service provider or consultant in the SWM (Service and Warranty Management) address book information.

PDBA Code (pay, deduction, benefit, or accrual code)
Enter the code that defines the type of pay, deduction, benefit, or accrual.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

Percentage Covered
Enter the percentage covered under warranty or contract. This value is used to calculate the amount to bill or the amount to cost for the line item that is processed on the service order or case.

Billable
Enter a value that specifies whether a general ledger account should be billed. Values are:

Y: Yes, the account should be billed.

N: No, it should not be billed.

1: It is eligible only for invoicing.

2: It is eligible only for revenue recognition.

4: It is eligible only for cost.

> **Note:** Codes 1, 2, and 4 relate only to Oracle's JD Edwards EnterpriseOne Service Billing system.

P.O. Number
Enter an alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.

Adjustment Schedule
Enter a value from UDC 40/AS to identify a price and adjustment schedule. A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through the customer billing instructions. When you enter a case, the system copies the schedule that is attached to the sold-to address into the order. You can override this schedule at the header level.

Price Effective Date
Enter the price effective date. The system uses this field to determine the base price and all advanced price adjustments. The value loaded in this date is stored in the F4009 table.

Billable Hours
Enter the number of hours billed.

Minimum Billable Hours
Enter the minimum number of hours to charge the customer. If the billable number of hours is less than the minimum number of hours, then the system charges the customer for the minimum number of hours instead of the billable number of hours.

Billing Rate
Enter the billing rate that the system uses when calculating the billable amount.

The billing rate is expressed in the currency that is set up for the company that initiates the transaction.

Minimum Billable Amount
Enter the minimum monetary amount to charge the customer. If the billable amount is less than the minimum amount, the system charges the customer for the minimum amount instead of the billable amount. This monetary amount is expressed in the currency of the company.

Discount Method
Specify the discount method. On the Item Price Category Revisions form, a **$** indicates that the numeric type is an added amount, a **%** indicates that the factor is a multiplier.

Discount Percent
Enter the takeoff pricing file discount percentage

Discount Amount
Enter the amount of the discount available, as opposed to the amount of the discount actually taken. The discount calculated is based on the invoice amount rather than the revenue amount.

Taxable
Enter the code that indicates whether the item is subject to sales tax when you sell it. The system calculates tax on the item only if the customer is also taxable.

Tax Explanation Code
Enter a value from UDC 00/EX that controls the algorithm that the system uses to calculate tax and general ledger distribution amounts. The system uses the tax explanation code in conjunction with the tax rate area and tax rules to determine how the tax is calculated. Each transaction pay item can be defined with a different tax explanation code.

Tax Rate/Area
Enter the code that identifies a tax or geographic area that has common tax rates and tax authorities. The system validates the code that you enter against the F4008 table. The system uses the tax rate area in conjunction with the tax explanation code and tax rules to calculate tax and general ledger distribution amounts when you create an invoice or voucher.

Bill To Number and Send Invoice To Number
Enter the user-defined name or number that identifies the bill to address book number, or enter the send invoice address book number. If you enter a value other than the address book number, such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the address book number in this field.

For example, if address book number 4100 (total solutions) has a long address of **TOTAL**, and an asterisk (*) distinguishes it from other entries (as defined in the Address Book constants), you might type ***TOTAL** in the field, and the system returns **4100**.

> **Note:** You can use the Send Invoice To Number to locate and enter information about the address book record.

10.5 Generating the Case Workfile

This section provides an overview of the case workfile and discusses how to set processing options for the Case Workfile Generation program (R17675).

10.5.1 Understanding the Case Workfile

When you run the Case Workfile Generation program, the system processes records in the F1755 and the F1760 tables.

When you run the generation program in final mode, the system creates billing records in the F4812 table and updates the case record with the date billed. The JD Edwards EnterpriseOne Service Billing system then creates workfile transactions that are used by Oracle's JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne General Accounting systems.

> **Important:** When you have billed a case in final mode, you cannot change it.

10.5.2 Form Used to Generate Case Workfile

Form Name	FormID	Navigation	Usage
Work With Batch Versions - Available Versions	W98305WA	Case (G90CE0201), Case Workfile Generation	Generate the case workfile.

10.5.3 Setting Processing Options for Case Workfile Generation (R17675)

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

10.5.3.1 Process

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

1. Proof or Final Mode

Specify whether to run the program in proof or final mode. Final mode updates all records. If you leave this processing option blank, the system generates the program in proof mode and does not update records. Values are:

Blank: Proof mode.

1: Final mode.

2. Work Center Or Report

Specify whether the system writes errors to the Work Center or to the report. Values are:

Blank: Write errors to the Work Center.

1: Write errors to the report.

10.5.3.2 Display

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

1. Print Domestic or Foreign

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

D: Domestic currency.

F: Foreign currency.

10.5.3.3 Defaults

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

1. Subledger

Specify the subledger value that the system uses when you create billing transactions. Values are:

Blank: No subledger value.

1: Case number.

2: Customer number.

3: Site number.

4: Item number.

5: Contract number.

6: Equipment number

2. Date Billed

Specify the date that the system uses when you create billing transactions. The system updates this field only when you run the report in final mode. Values are:

Blank: System date.

1: Case beginning date.

10.5.3.4 Vertex

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

1. Vertex Transaction Type for Labor Billings and 2.

Specify the Vertex transaction type that the system uses when calculating taxes for time entry billing or flat rate billing. Only use this transaction type if you are billing for cases and the pricing method is Time and Materials.

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

> **Note:** Use Vertex Transaction Type for Flat Rate Billings only if you are billing for cases and the pricing method is flat rate.

A

Delivered Workflow for JD Edwards EnterpriseOne CRM Support Applications

This appendix contains the following topics:

- Section A.1, "Delivered Workflow for JD Edwards EnterpriseOne CRM Support Applications"

> **See Also:**
>
> - *JD Edwards EnterpriseOne Tools Workflow Tools Guide*.

A.1 Delivered Workflow for JD Edwards EnterpriseOne CRM Support Applications

This section discusses the JD Edwards EnterpriseOne CRM Support Applications workflow.

A.1.1 Halt Workflow

This section discusses the Halt workflow.

A.1.1.1 Description

Workflow Description
The system halts the workflow until the time to send a warning message, and then halts the workflow again until the time to escalate. There is a business function that recursively creates K90CG01 until the end of the calculated time.

Workflow Trigger
The time elapses to send a warning message, and the time elapses to escalate.

Workflow Action
The business function is initiated.

A.1.1.2 Workflow Objects

System
90CG

Workflow Object Name
K90CG01

Object ID
N90CG01

Event Description / Function Name
StartCaseEscalationWorkflow

Sequence / Line Numbers
4

A.1.2 Past Due Message

This section discusses the Past Due Message workflow.

A.1.2.1 Description

Workflow Description
The system sends the past due message to the manager.

Workflow Trigger
The allocated time elapses, and the case status has not been changed to closed.

Workflow Action
An email is sent to the manager as notification that the case is being escalated to the next provider group member.

A.1.2.2 Workflow Objects

System
90CG

Workflow Object Name
K90CG06

Object ID
N90CG01

Event Description / Function Name
StartCasePastDueMessageWF

Sequence / Line Number
4

A.1.3 Past Due Work Flow

This section discusses the Past Due Work Flow.

A.1.3.1 Description

Workflow Description
Triggers the sending of a "past due warning message" and a "past due message". Also, reassigns case to manager when past due.

Workflow Trigger
Instantiation occurs when:

1. a case is created, or

2. a case is updated with a new commitment date/time

Workflow Action
K90CG02 halts until a percentage of the commitment time of a case has expired. This percentage value is configurable by the user. At this point, a business function is called that instantiates a K90CG05 work flow, which in turn sends an email (past due warning message) message to whoever the current assignee is on the case. Then K90CG02 halts again until the entire commitment time has expired. At this point, a business function is called which reassigns the case to the manager of the assigned provider group, and instantiates a K90CG06 work flow, which in turn sends an email (past due message) message to the manager of the assigned provider group on the case.

A.1.3.2 Workflow Objects

System
90CG

Workflow Object Name
K90CG02

Object ID
N90CG01

Event Description / Function Name
StartCasePastDueWorkflow

Sequence / Line Number
4

A.1.4 Escalation Message

This section discusses the Escalation Message workflow.

A.1.4.1 Description

Workflow Description
The system sends the escalation message to the next assignee.

Workflow Trigger
The lower-level provider group member does not change the case status to closed.

Workflow Action
The system sends an email to the provider group member at the next level.

A.1.4.2 Workflow Objects

System
90CG

Workflow Object Name
K90CG07

Object ID
N90CG01

Event Description / Function Name
StartEscalationPeriodExpireMsg

Sequence / Line Number
4

A.1.5 Escalation Warning

This section discusses the Escalation Warning workflow.

A.1.5.1 Description

Workflow Description
The system sends an escalation warning message.

Workflow Trigger
The lower-level provider group member does not change the case status to closed within the time allotted.

Workflow Action
The system sends an email notification to the case assignee that the case is being escalated within a specified time if the case is not closed.

A.1.5.2 Workflow Objects

System
90CG

Workflow Object Name
K90CG03

Object ID
N90CG01

Event Description / Function Name
StartEscalationWarningMessageW

Sequence / Line Number
4

A.1.6 Initial Escalation Message

This section discusses the Initial Escalation Message workflow.

A.1.6.1 Description

Workflow Description
The system sends the message to the person in the workflow who is initially assigned the case.

Workflow Trigger
The case is created and assigned to a provider group member.

Workflow Action
The system sends an email to the provider group member as notification of case assignment.

A.1.6.2 Workflow Objects

System
90CG

Workflow Object Name
K90CG04

Object ID
N90CG01

Event Description / Function Name
StartInitialAssignmentMessageW

Sequence / Line Number
4

A.1.7 Past Due Warning Message

This section discusses the Past Due Warning Message workflow.

A.1.7.1 Description

Workflow Description
The system sends a past due warning message.

Workflow Trigger
The assigned provider group member does not change the case status to closed within the allocated time.

Workflow Action
An email is sent to the provider group manager.

A.1.7.2 Workflow Objects

System
90CG

Workflow Object Name
K90CG05

Object ID
N90CG01

Event Description / Function Name
StartPastDueWarningMessageWF

Sequence / Line Number
3

A.1.8 Process Call Status Change

This section discusses the Process Call Status Change workflow.

A.1.8.1 Description

Workflow Description
The system sends a message if the status is changed to a closed status (the case is closed).

Workflow Trigger
A change in the status of a case.

Workflow Action
Customers will receive notifications that their cases have been closed.

A.1.8.2 Workflow Objects

System
17

Workflow Object Name
CALLSTATUS

Object IDs
W90CG504A, W90CG501J

Event Description / Function Name
Post OK Button Clicked, Post Save Button Clicked

Sequence / Line Numbers
69, 71

A.1.9 Call Escalation Workflow Process

This section discusses the Call Escalation Workflow Process workflow.

A.1.9.1 Description

Workflow Description
The system sends a message to a user-defined distribution list if the case is not closed before the escalation date and time.

Workflow Trigger
Running the R17680 program, and the case is not closed before the escalation date and time.

Workflow Action
A user-defined distribution list will be notified if cases are not closed before the escalation date and time.

A.1.9.2 Workflow Objects

System
17

Workflow Object Name
CALLESCAL

Object ID
R17680

Event Description / Function Name
Do Section

Sequence / Line Number
62

B

JD Edwards EnterpriseOne CRM Support Applications Reports

This appendix contains the following topics:

- Section B.1, "JD Edwards EnterpriseOne CRM Support Applications Reports: A to Z"
- Section B.2, "JD Edwards EnterpriseOne CRM Support Applications Selected Reports"

B.1 JD Edwards EnterpriseOne CRM Support Applications Reports: A to Z

These tables list the JD Edwards EnterpriseOne CRM Support Applications reports.

This section discusses CRM reports in these categories:

- Support applications
- Action plan/activity
- Competitor
- Customer
- Employee
- Partner
- Contact
- Product catalog

B.1.1 Support Applications Reports

Report ID and Report Name	Description	Navigation
R17670 Case Detail/Summary Report	Run different versions of this report to display and organize detail or summary information for closed cases. Versions have been set up to organize cases using these methods: ■ Case by provider group – version XJDE0001 ■ Case by product model – version XJDE0002 ■ Case by environment – version XJDE0003 ■ Case by equipment number – version XJDE0004	Case (G90CE0201), Case Detail Summary Report
R17671 Case Statistics by Assignee	Use this report to create reports that display close cases by: ■ Assignee – version XJDE0001 ■ Provider group – version XJDE0002	Case (G90CE0201), Case Statistics by Assignee
R17672 Case Statistics by Product	Use this report to create reports that display closed case statistics and organize the report by any of these methods: ■ Cases by product model – version XJDE0001 ■ Cases by environment – version XJDE0002 ■ Cases by equipment number – version XJDE0003 ■ Cases by item number – version XJDE0004 ■ Cases by provider group – version XJDE0005	Case (G90CE0201), Case Statistics by Product
R17673 Case Duration Statistics by Product	Use this report to create reports that display the duration of closed cases and organize the report by any of these methods: ■ Cases by product model – version XJDE0001 ■ Cases by environment – version XJDE0002 ■ Cases by equipment number – version XJDE0003 ■ Cases by item number – version XJDE0004 ■ Cases by provider group – version XJDE0005	Case (G90CE0201), Case Statistics by Product
R17674 Print Case	Use this report to print case information. Through the processing options, you can specify to print associated media objects.	Case (G90CE0201), Case Print

Report ID and Report Name	Description	Navigation
R17680 Escalated Cases	If you are escalating cases using the notification method, run this report to check for cases that the system needs to escalate. See Escalating (Promoting) Cases.	Case (G90CE0201), Escalation Processing
R90CG700 Cases by Customers Report	Use this report to review cases by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each customer.	Case (G90CE0201), Cases By Customer
R90CG701 Cases by Priority Report	Use this report to view cases organized by priority (user defined code [UDC] 17/PR). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each case priority.	Case (G90CE0201), Cases By Priority
R90CG702 Cases by Status Report	Use this report to view cases organized by status (UDC 17/ST). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each status.	Case (G90CE0201), Cases By Status
R90CG703 Cases By Type Report	Use this report to view cases organized by type (UDC 17/CT). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each case type.	Case (G90CE0201), Cases By Type
R90CG704 Cases Status By Agent Report	Use this report to review case status organized by call center agent.	Case (G90CE0201), Cases Status By Agent
R90CG705 Case Analysis By Product Family	Use this report to review case information organized by product family (UDC 17/PA).	Case (G90CE0201), Case Analysis By Product Family

B.1.2 Action Plan/Activity Reports

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List	Use this report to view all summary information about all action plans, such as the description of the plan and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CE0202), Action Plan Listing

Report ID and Report Name	Description	Navigation
R90CA1301B Activities by a Customer Contact	Use this report to view all assigned activities for each customer. The activities are grouped by customer and include each activity's contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CE0202), Activity-Activities By Customer
R90CA13D Periodic Planner	Use this report to display selected user schedules, including activities and to-do items, for a specified period of time. The report also includes all related details for each activity or to-do item.	Action Plan/Activity (G90CE0202), Activity-Periodic Planner

B.1.3 Competitor Reports

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail	Use this report to view all information about a competitor and the competitor's products. You can use this report to compare the products from the organization with those of the competitors.	Competitor G90CE0203), Competitor Price Selected

B.1.4 Customer Reports

Report ID and Report Name	Description	Navigation
R90CA0111A Contacts for a Customer	Use this report to view each contact, along with the associated contact information for each selected customer.	Customer (G90CE0204), Contacts By Customer
R90CA080B Customer/Contact Summary-Sel	Use this report to view summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CE0204), Customer Contact Summary
R90CA080G Customer Summary - Selected	Use this report to view summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CE0204), Customer Summary

B.1.5 Employee Report

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List	Use this report to view all active employees in the system, along with their titles and phone numbers.	Employee (G90CE0205), Employee Phone List

B.1.6 Partner Report

Report ID and Report Name	Description	Navigation
R90CA01B Customer Partner List	Use this report to view all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CE0206), Partner List

B.1.7 Contact Reports

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Address Avery 5163	Use this report to produce shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5163)
R90CA070B Contact Address Avery 5160	Use this report to produce mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5160)
R90CA070C Contact Address Avery 5161	Use this report to produce mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5161)

B.1.8 Product Catalog Report

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List	Use this report to view all product catalogs, along with the available products that are associated with each catalog.	Product Catalog (G90CE0108), Product Catalog List

B.2 JD Edwards EnterpriseOne CRM Support Applications Selected Reports

This section provides detailed information about individual reports, including important processing options and tables accessed. The reports are listed alphanumerically by report ID.

B.2.1 R17670 – Case Detail/Summary

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

Run different versions of this report to review cases organized by:

- Provider group – version XJDE0001.

- Product model – version XJDE0002.

- Environment – version XJDE0003.

- Equipment number – version XJDE0004.

B.2.2 Processing Options for Case Detail/Summary Report (R17670)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.2.1 Defaults

The processing options on this tab define the defaults that the system uses when you run the Case Detail/Summary report.

1. Print Product Model or Item Number

Specify whether the system includes the product model or the item number on the Case Detail report or the Case Summary report. Values are:

Blank: Product model

1: Item number

2. From Date and 3. Thru Date

Specify the from date or the through date.

> **Note:** If you leave the Thru Date processing option blank, the system uses the current date.

B.2.2.2 Print

1. Print Report

Specify whether the system generates the Case Summary report or the Case Detail report. Values are:

Blank: Case Summary

1: Case Detail

B.2.3 Processing Options for Case Statistics by Assignee (R17671), Case Statistics by Product (R17672), and Case Duration Statistics by Product (R17673)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.3.1 Defaults

The processing options on this tab define the default values that the system uses when you run the report.

1. From Date and 2. Thru Date
Specify the from date or the through date.

> **Note:** If you leave the Thru Date processing option blank, the system uses the current date.

3. Case Type for Handled Live
Specify the case type for live requests. Live requests are from customers who speak to a representative on the first call. The request types appear in the request statistics on the report. Enter a value from UDC 17/CT.

4. Closed Case Status
Specify the status for closed cases. Cases with this status appear in the statistics on the report. Enter a value from UDC 17/ST.

B.2.4 Processing Options for Case Print Report (R17674)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.4.1 Print

1. Print Media Object
Specify whether to include associated media objects on the report. Values are:

Blank: Do not include.

1: Include.

B.2.5 Processing Options for Escalation Processing Report (R17680)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.5.1 Print

1. Display Cases Processed for Escalation
Specify whether the system displays cases that are not escalated. Values are:

Blank: Print both escalated and not escalated cases.

1: Print only escalated cases.

B.2.6 Processing Options for Employee Phone List Report (R90CA0101E)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.6.1 Defaults

These processing options specify default information that is used to process the report.

1. Enter Search Type for an Employee:
Specify the search type from UDC 01/ST that is used to identify employees.

2. Enter Phone Number Type for Business Phone:
Specify the business phone type from UDC 01/PH.

B.2.7 Processing Options for Contacts for a Customer Report (R90CA0111A)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.7.1 Defaults

The processing options on this tab specify the default information that is used to process the report.

1. Enter Phone Number Type for Business phone: and 2. Enter Phone Number Type for Fax number:
Specify the business phone type or the fax phone type from UDC 01/PH.

3. Enter Type - Address for Work Address:
Specify the work address type from UDC 01/AT.

B.2.8 Processing Options for Customer Partner List Report (R90CA01B)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.8.1 Defaults

The processing options on this tab specify the default information that is used to process the report.

1. Enter Phone Number Type for Business phone:
Specify the business phone type or the fax phone type from UDC 01/PH.

3. Enter Electronic Address Type for Internet Address (url):
Specify the internet address type from UDC 01/ET.

B.2.9 Processing Options for Contact Address Avery 5163 Report (R90CA070AA), Contact Address Avery 5160 Report (R90CA070B), and Contact Address Avery 5161 Report (R90CA070C)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.9.1 Defaults

1. Enter the Search Type for a Customer:
Specify the customer search type from UDC 01/ST.

B.2.10 Processing Options for Customer/Contact Summary – Sel Report (R90CA080B)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.10.1 Defaults

The processing options on this tab specify the default information that is used to process the report.

1. Enter Phone Number Type for Business phone:
Specify the business phone type from UDC 01/PH.

2. Enter Electronic Address Type for Internet Address (url): and 3. Enter Electronic Address Type for Email address:
Specify the internet address type or the email address type from UDC 01/ET.

4. Enter Type - Address for Work Address:
Specify the work address type from UDC 01/AT.

B.2.11 Processing Options for Customer Summary – Selected Report (R90CA080G)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.11.1 Defaults

The processing options on this tab specify the default information that is used to process the report.

1. Enter Phone Number Type for Business phone:, 2. Enter Phone Number Type for mobile phone:, and 3. Enter Phone Number Type for fax number:
Specify the business phone type, mobile phone type, or fax phone type from UDC 01/PH.

4. Enter Electronic Address Type for url (Internet Address):
Specify the internet address type from UDC 01/ET.

B.2.12 R90CA1301B – Activities By A Customer Contact

This report includes all assigned activities for each customer. The activities are grouped by customer, and include each activity's contact name, phone number, description, date scheduled, start time, and activity type.

B.2.13 Processing Options for Activities By A Customer Contact Report (R90CA1301B)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.13.1 Defaults

The processing option on this tab specifies the default information that is used to process the report.

1. Enter Phone Number Type for Business phone

Specify which customer phone number to print on the report. Values are stored in the UDC 01/PH table.

B.2.14 R90CA13D – Periodic Planner

This report displays selected user schedules, including activities and to-do items, for a specified period of time. The report also includes all related details for each activity or to-do item.

B.2.15 Processing Options for Periodic Planner (R90CA13D)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.15.1 Process

1. Start Date and 2. End Date

Specify the beginning date or the end date in the date range for which you want to track lead information. If you leave this processing option blank, the system uses current date.

B.2.15.2 Print

1. Include "Task" Section

Specify whether the system prints the Task section on the report. If you leave this option blank, the system includes the Task section and the Activities section on the report. If you enter **1** in this option, the system includes only the Activities section on the report. Values are:

Blank: Include.

1: Do not include.

B.2.16 Processing Options for Cases by Customers Report (R90CG700), Cases by Priority Report (R90CG701), Cases by Status Report (R90CG702), and Cases By Type Report (R90CG703)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.16.1 Process

1. From Date and 2. Through Date

Specify the from date or the through date. If you leave this processing option blank, the system uses the current date.

B.2.16.2 Print

1. Print Report

Specify whether the system prints summary, detail, or summary and detail case information. Values are:

Blank: Case detail and summary information.

1: Case detail information.

2: Case summary information.

B.2.17 Processing Options for Cases Status By Agent Report (R90CG704) and Case Analysis By Product Family Report (R90CG705)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

B.2.17.1 Process

1. From Date and 2. Through Date
Enter the from date or the through date. If you leave this processing option blank, the system uses the current date.

Glossary

AccessorMethods/Assessors

Java methods to "get" and "set" the elements of a value object or other source file.

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 JD Edwards 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.

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 JD Edwards EnterpriseOne FinancialManagement, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.

Application Server

Software that provides the business logic for an application program in a distributed environment. The servers can be Oracle Application Server (OAS) orWebSphere Application Server (WAS).

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

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 JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.

Auto Commit Transaction

A database connection through which all database operations are immediately written to the database.

back-to-back process

A process in JD Edwards EnterpriseOne Supply 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 JD Edwards EnterpriseOne.

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

best practices

Non-mandatory guidelines that help the developer make better design decisions.

BPEL

Abbreviation for Business Process Execution Language, a standard web services orchestration language, which enables you to assemble discrete services into an end-to-end process flow.

BPEL PM

Abbreviation for Business Process Execution Language ProcessManager, a comprehensive infrastructure for creating, deploying, and managing BPEL business processes.

Build Configuration File

Configurable settings in a text file that are used by a build program to generate ANT scripts. ANT is a software tool used for automating build processes. These scripts build published business services.

build engineer

An actor that is responsible for building, mastering, and packaging artifacts. Some build engineers are responsible for building application artifacts, and some are responsible for building foundation artifacts.

Build Program

AWIN32 executable that reads build configuration files and generates an ANT script for building published business services.

business analyst

An actor that determines if and why an EnterpriseOne business service needs to be developed.

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-JD Edwards 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 service

EnterpriseOne business logic written in Java. A business service is a collection of one or more artifacts. Unless specified otherwise, a business service implies both a published business service and business service.

business service artifacts

Source files, descriptors, and so on that are managed for business service development and are needed for the business service build process.

business service class method

A method that accesses resources provided by the business service framework.

business service configuration files

Configuration files include, but are not limited to, interop.ini, JDBj.ini, and jdelog.properties.

business service cross reference

A key and value data pair used during orchestration. Collectively refers to both the code and the key cross reference in the WSG/XPI based system.

business service cross-reference utilities

Utility services installed in a BPEL/ESB environment that are used to access JD Edwards EnterpriseOne orchestration cross-reference data.

business service development environment

A framework needed by an integration developer to develop and manage business services.

business services development tool

Otherwise known as JDeveloper.

business service EnterpriseOne object

A collection of artifacts managed by EnterpriseOne LCMtools. Named and represented within EnterpriseOne LCM similarly to other EnterpriseOne objects like tables, views, forms, and so on.

business service framework

Parts of the business service foundation that are specifically for supporting business service development.

business service payload

An object that is passed between an enterprise server and a business services server. The business service payload contains the input to the business service when passed to the business services server. The business service payload contains the results from the business service when passed to the Enterprise Server. In the case of notifications, the return business service payload contains the acknowledgement.

business service property

Key value data pairs used to control the behavior or functionality of business services.

Business Service Property Admin Tool

An EnterpriseOne application for developers and administrators to manage business service property records.

business service property business service group

A classification for business service property at the business service level. This is generally a business service name. A business service level contains one or more business service property groups. Each business service property group may contain zero or more business service property records.

business service property categorization

A way to categorize business service properties. These properties are categorized by business service.

business service property key

A unique name that identifies the business service property globally in the system.

business service property utilities

A utility API used in business service development to access EnterpriseOne business service property data.

business service property value

A value for a business service property.

business service repository

A source management system, for example ClearCase, where business service artifacts and build files are stored. Or, a physical directory in network.

business services server

The physical machine where the business services are located. Business services are run on an application server instance.

business services source file or business service class

One type of business service artifact. A text file with the .java file type written to be compiled by a Java compiler.

business service value object template

The structural representation of a business service value object used in a C-business function.

Business Service Value Object Template Uti ity

A utility used to create a business service value object template from a business service value object.

business services server artifact

The object to be deployed to the business services server.

business view

Ameans for selecting specific columns from one or more JD Edwards EnterpriseOne application 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 objectsmerge

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 JD Edwards 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 JD Edwards EnterpriseOne that appear on forms in the software.

check-in repository

A repository for developers to check in and check out business service artifacts. There are multiple check-in repositories. Each can be used for a different purpose (for example, development, production, testing, and so on).

connector

Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.

contra/clearing account

A general ledger account in JD Edwards EnterpriseOne FinancialManagement 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 JD Edwards EnterpriseOne Financial Management.

Control TableWorkbench

An application that, during the InstallationWorkbench 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.

correlation data

The data used to tie HTTP responses with requests that consist of business service name and method.

cost assignment

The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.

cost component

In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).

credentials

A valid set of JD Edwards EnterpriseOne username/password/environment/role, EnterpriseOne session, or EnterpriseOne token.

cross-reference utility services

Utility services installed in a BPEL/ESB environment that access EnterpriseOne cross-reference data.

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.

cXML

A protocol used to facilitate communication between business documents and procurement applications, and between e-commerce hubs and suppliers.

database credentials

A valid database username/password.

database server

A server in a local area network that maintains a database and performs searches for client computers.

Data SourceWorkbench

An application that, during the InstallationWorkbench 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 artifacts

Artifacts that are needed for the deployment process, such as servers, ports, and such.

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 JD Edwards 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.

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.

duplicate published business services authorization records

Two published business services authorization records with the same user identification information and published business services identification information.

embedded application server instance

An OC4J instance started by and running wholly within JDeveloper.

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 JD Edwards 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.

EmployeeWork Center

A central location for sending and receiving all JD Edwards 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 JD Edwards EnterpriseOne.

Enterprise Service Bus (ESB)

Middleware infrastructure products or technologies based on web services standards that enable a service-oriented architecture using an event-driven and XML-based messaging framework (the bus).

EnterpriseOne administrator

An actor responsible for the EnterpriseOne administration system.

EnterpriseOne credentials

A user ID, password, environment, and role used to validate a user of EnterpriseOne.

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 development client

Historically called "fat client," a collection of installed EnterpriseOne components required to develop EnterpriseOne artifacts, including theMicrosoftWindows client and design tools.

EnterpriseOne extension

A JDeveloper component (plug-in) specific to EnterpriseOne. A JDeveloper wizard is a specific example of an extension.

EnterpriseOne process

A software process that enables JD Edwards 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. JD Edwards 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.

EnterpriseOne resource

Any EnterpriseOne table, metadata, business function, dictionary information, or other information restricted to authorized users.

EnvironmentWorkbench

An application that, during the InstallationWorkbench process, copies the environment information and Object ConfigurationManager 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 forward 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.

explicit transaction

Transaction used by a business service developer to explicitly control the type (auto or manual) and the scope of transaction boundaries within a business service.

exposed method or value object

Published business service source files or parts of published business service source files that are part of the published interface. These are part of the contract with the customer.

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 users 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.

foundation

A framework that must be accessible for execution of business services at runtime. This includes, but is not limited to, the Java Connector and JDBj.

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.

HTTP Adapter

A generic set of services that are used to do the basic HTTP operations, such as GET, POST, PUT, DELETE, TRACE, HEAD, and OPTIONS with the provided URL.

instantiate

A Java term meaning "to create."When a class is instantiated, a new instance is

created.

integration developer

The user of the system who develops, runs, and debugs the EnterpriseOne business services. The integration developer uses the EnterpriseOne business services to develop these components.

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.

interface table

See Z table.

internal method or value object

Business service source files or parts of business service source files that are not part of the published interface. These could be private or protected methods. These could be value objects not used in published methods.

interoperability model

A method for third-party systems to connect to or access JD Edwards EnterpriseOne.

in-your-face-error

In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.

IServer service

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 JD Edwards EnterpriseOne appears 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 JDEdwards EnterpriseOne 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 JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards 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 JD Edwards 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 JD Edwards EnterpriseOne.

JDENET

A JDEdwards EnterpriseOne 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 JD Edwards EnterpriseOne supported platforms.

JDeveloper Project

An artifact that JDeveloper uses to categorize and compile source files.

JDeveloperWorkspace

An artifact that JDeveloper uses to organize project files. It contains one or more project files.

JMS Queue

A JavaMessaging service queue used for point-to-point messaging.

listener service

A listener that listens for XML messages over HTTP.

local repository

A developer's local development environment that is used to store business service artifacts.

local standalone BPEL/ESB server

A standalone BPEL/ESB server that is not installed within an application server.

Location Workbench

An application that, during the InstallationWorkbench process, copies all locations that are defined in the installation plan from the LocationMaster 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 JD Edwards EnterpriseOne software runs.

MailMerge Workbench

An application that mergesMicrosoftWord 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can useMailMergeWorkbench to print documents, such as form letters about verification of employment.

Manual Commit transaction

A database connection where all database operations delay writing to the database until a call to commit is made.

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 JD Edwards 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 JD Edwards 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 JD Edwards 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.

Middle-Tier BPEL/ESB Server

ABPEL/ESB server that is installed within an application server.

Monitoring Application

An EnterpriseOne tool provided for an administrator to get statistical information for various EntepriseOne servers, reset statistics, and set notifications.

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 ConfigurationManager (OCM)

In JD Edwards 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 JD Edwards 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 JD Edwards EnterpriseOne data for summarization and report generation.

Output Stream Access (OSA)

An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

package

JD Edwards 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 snapshot 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 JD Edwards 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 InstallationWorkbench 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.

Pathcode Directory

The specific portion of the file system on the EnterpriseOne development client where EnterpriseOne development artifacts are stored.

patterns

General repeatable solutions to a commonly occurring problem in software design. For business service development, the focus is on the object relationships and interactions. For orchestrations, the focus is on the integration patterns (for example, synchronous and asynchronous request/response, publish, notify, and receive/reply).

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 JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne 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 JDEdwards 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.

Production Published Business ServicesWeb Service

Published business services web service deployed to a production application server.

program temporary fix (PTF)

A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.

project

In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object ManagementWorkbench.

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 business service

EnterpriseOne service level logic and interface. A classification of a published business service indicating the intention to be exposed to external (non-EnterpriseOne) systems.

published business service identification information

Information about a published business service used to determine relevant authorization records. Published business services + method name, published business services, or *ALL.

published business service web service

Published business services components packaged as J2EEWeb Service (namely, a J2EE EAR file that contains business service classes, business service foundation, configuration files, and web service artifacts).

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 JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards 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 JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event

A message triggered from EnterpriseOne application logic that is intended for external systems to consume.

refresh

A function used to modify JD Edwards 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.

Rt-Addressing

Unique data identifying a browser session that initiates the business services call request host/port user session.

rules

Mandatory guidelines that are not enforced by tooling, but must be followed in order to accomplish the desired results and to meet specified standards.

quote order

In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

In JD Edwards Sales OrderManagement, item and price information for a customer who has not yet committed to a sales order.

secure by default

A security model that assumes that a user does not have permission to execute an object unless there is a specific record indicating such permissions.

Secure Socket Layer (SSL)

A security protocol that provides communication privacy. SSL enables client and server applications to communicate in a way that is designed to prevent eavesdropping, tampering, and message forgery.

SEI implementation

A Java class that implements the methods that declare in a Service Endpoint Interface (SEI).

selection

Found on JD Edwards EnterpriseOne 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.

serialize

The process of converting an object or data into a format for storage or transmission across a network connection link with the ability to reconstruct the original data or objects when needed.

ServerWorkbench

An application that, during the InstallationWorkbench process, copies the server configuration files from the Planner data source to the system-release number data source. The application also updates the Server Plan detail record to reflect completion.

Service Endpoint Interface (SEI)

A Java interface that declares the methods that a client can invoke on the service.

SOA

Abbreviation for Service Oriented Architecture.

softcoding

A coding technique that enables an administrator to manipulate site-specific variables that affect the execution of a given process.

source repository

A repository for HTTP adapter and listener service development environment artifacts.

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 JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.

Specification TableMerge Workbench

An application that, during the InstallationWorkbench process, runs the batch applications that update the specification tables.

SSL Certificate

A special message signed by a certificate authority that contains the name of a user and that user's public key in such a way that anyone can "verify" that the message was signed by no one other than the certification authority and thereby develop trust in the user's public key.

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.

superclass

An inheritance concept of the Java language where a class is an instance of something, but is also more specific. "Tree" might be the superclass of "Oak" and "Elm," for example.

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.

For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and SupplierMaster 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 JD Edwards EnterpriseOne systems.

table accessmanagement (TAM)

The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAMstores 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 JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table conversion

An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards 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 JD Edwards 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 JD Edwards EnterpriseOne.

three-way voucher match

In JD Edwards 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

Amonitor 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 processing method

A method related to the management of a manual commit transaction boundary (for example, start, commit, rollback, and cancel).

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 authentication

An authentication mechanism in which both client and server authenticate themselves by providing the SSL certificates to each other.

two-way voucher match

In JD Edwards 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 identification information

User ID, role, or *public.

User Overridesmerge

Adds new user override records into a customer's user override table.

value object

A specific type of source file that holds input or output data, much like a data structure passes data. Value objects can be exposed (used in a published business service) or internal, and input or output. They are comprised of simple and complex elements and accessories to those elements.

variance

In JD Edwards Capital AssetManagement, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, 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.

versioning a published business service

Adding additional functionality/interfaces to the published business services without modifying the existing functionality/interfaces.

Version Listmerge

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 JD Edwards EnterpriseOne 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

Aweb 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.

Web Service Description Language (WSDL)

An XML format for describing network services.

Web Service Inspection Language (WSIL)

An XML format for assisting in the inspection of a site for available services and a set of rules for how inspection-related information should be made.

web service proxy foundation

Foundation classes for web service proxy that must be included in a business service server artifact for web service consumption onWAS.

web service softcoding record

An XML document that contains values that are used to configure a web service proxy. This document identifies the endpoint and conditionally includes security information.

web service softcoding template

An XML document that provides the structure for a soft coded record.

Where clause

The portion of a database operation that specifies which records the database operation will affect.

Windows terminal server

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

wizard

A type of JDeveloper extension used to walk the user through a series of steps.

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 JD Edwards EnterpriseOne Payroll CycleWorkbench (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 JD Edwards EnterpriseOne workbenches include Service ManagementWorkbench (P90CD020), Line SchedulingWorkbench (P3153), PlanningWorkbench (P13700), Auditor'sWorkbench (P09E115), and Payroll CycleWorkbench.

work day calendar

In JD Edwards EnterpriseOne Manufacturing, 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 JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne 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 JD Edwards EnterpriseOne for responses.

XML List

An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.

XML Service

An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.

XML Transaction

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

XML Transaction Service (XTS)

Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event

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

Z table

Aworking table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards 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 JD
Edwards EnterpriseOne database.

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