Infor EAM Requestor User Guide

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Contents

About this guide

This guide provides conceptual information for *Infor EAM Requestor User Guide*.

Requestor allows companies to easily increase the number of users submitting work requests and puchase requisitions without significantly increasing their financial investment. With Requestor, companies can authorize employees to enter and view the status of work requests and purchase requisitions over the Web. Requestor effectively extends basicInfor EAM functionality from room-to-room or site-to-site and lowers the total costs of ownership.

Requestor is sold only as a supplemental set of seats in conjunction with the purchase of Infor EAM. Requestor allows you to do the following:

- Log in via Infor EAM accounts and security
- View the status of work requests and purchase requisitions
- Enter work requests and purchase requisitions
- Create, modify, approve, and view requests for equipment reservations
- Create operator checklist results for equipment

In Requestor, you can create, modify, view, and submit work requests and purchase requisitions, but you cannot approve work requests or purchase requisitions. You can only approve work requests and purchase requisitions in Infor EAM.

Intended audience

This guide is for the Infor EAM users who are responsible for creating, modifying, and submitting work requests and purchase requisitions.

Organization

This table describes the chapters of this guide:

Chapter	Description
Basics	This chapter includes basic information regarding Requestor and procedures for operating Requestor. It details general functions of the software such as logging in and exporting files. In addition, this chapter provides descriptions of the user interface, including information about the toolbars and forms.

Chapter	Description
Requests	This chapter includes information regarding creating, viewing, and modifying work requests, and equipment reservation requests. You cannot approve or reject work requests in Requestor.
Purchase requisitions	This chapter includes information regarding creating, viewing, and modifying purchase requisitions. It provides information regarding adding parts to requisitions and executing an advanced part search. You cannot approve or reject purchase requisitions in Requestor. It also details information on creating operator checklist results for equipment, and creating follow-up work orders or deferred maintenance records for checklist items.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Basics

1

This chapter describes Requestor features and outlines the procedures for basic operation.

Starting the application

The application is a Web-architected, Internet-based application, accessible via Internet Explorer, Google Chrome, and Safari browsers. Additionally, your browser must be set up to allow cookies and enable JavaScript before accessing the login page.

To start the application:

1. Choose **Start > Programs > Internet Explorer** from the Windows taskbar.
2. Specify this information:

   Address
   Specify the URL provided by your system administrator.

   User ID
   Specify your user ID.

   Password
   Specify your password.

   Note: Users can change passwords at any time.

   Periodically, you are required to change your password.

3. Click **Log In**.

   If you have query rights for the Start Center home page, work orders, purchase requisitions, and service requests assigned to you are displayed. To see the record details, double-click the selected record.

   Note: To log out and return to the login page, click **Logout** on the header.

   If you want to bookmark the login page as a shortcut link, you may provide the User ID in the URL:

   http://YourServer/web/base/logindisp?userid=YourUserID. If your User ID contains a "+" symbol, then you must substitute "%2B" for the "+" symbol.

If you have forgotten your password, click **Forgot Password**. Specify your **User ID**, and then click **Reset My Password**.

Navigating the user interface

Infor EAM includes several navigation options that allow you to quickly and easily find the pages and information you need. Navigate through the system by clicking icons, menus, buttons, tabs, and hyperlinks on each page.

Accessing options on the header

Access basic functions on the header drop-down, which is displayed in the left-hand pane on all pages. Additionally, click on the navigation tabs to access the major functional areas or modules within the system.

See the following descriptions when accessing options on the header:

Option	Function
Start Center	Displays the **Start Center home** page
My Account	Displays the **My Account** page, which allows you to view and change your e-mail address, system language, login password, and success message information
Help	Displays help topics covering system procedures and a link to the User’s Guide
About	Displays system application information, such as application name, version number, schema name, and user ID
Logout	Logs out of the system

Accessing the menu bar

The system displays functions and menus that apply to a form or page on the menu bar. When you position your mouse over the navigation menus on the menu bar, the system displays a "drop-down" menu that lists the forms that apply to that navigation menu. Select an item from the drop-down menu to open the corresponding form.

Click the drop-down menu to view the screens currently in the history queue. This includes most recently viewed screens during a session, and the cached screen folder, with cached screens displaying alphabetically. The entire history is cleared when you log out and therefore won't be available when you log back in.

Using the toolbar

Access basic system functions on the toolbar. Hover the cursor over a button to view a pop-up description of the button's function.

See the following descriptions when accessing buttons on the toolbar:

Hover text/function	Shortcut
Previous Screen returns to the previous page	CTRL+Left Arrow or F11
Save Record saves the current record	CTRL+S or F10
New Record inserts a new record	CTRL+N or F6
Delete Record deletes the record	CTRL+D or CTRL+F6
Next Record displays the next record	CTRL+Down Arrow
Previous Record displays the previous record	CTRL+Up Arrow
Copy Record copies the current record. See "Copying records" on page 21.	CTRL+F or F4
Reset Screen clears changes to the current record	CTRL+R
Print Record prints the current record	ALT+P
Print Preview displays a preview of the current report	
Help displays online help for the current page	ALT+H
Screen Designer displays the page in designer mode, for system administrators only	ALT+E
`EPAK` opens a link to Infor's Education Performance Accelerator Kit (`EPAK`), an end-user training and support application to help you get up and running quickly.	ALT+K
Expand Left closes the summary grid and displays the full record view layout.	
Split View restores the split view layout with a summary grid of records on the left-pane and a record view layout on the right-pane.	
Expand Right closes the record view and displays a full list view layout.	

Understanding the message bar

The system uses the message bar at the top of the window to quickly display messages, errors, and options you must view or select after performing an action. The message bar can include any of the following message types:

Message type	Description
Error	Indicates an error (e.g., a requisition must contain line items or the record has been modified by another user)
Warning	Warns the user of an impending action (e.g., password expiration or overwriting an existing record)
Question	Requires the user to select an option before taking an action (e.g., enter a reason for rejection prior to rejecting a requisition or work request)
Success	Indicates the action was successfully completed (e.g., clicking Submit successfully created a requisition)
Information	Displays informational text that is not the result of a user's action (e.g., a system message)

Using the keyboard shortcuts

Keyboard shortcuts are keys or key combinations for functions within Infor EAM.

System keyboard shortcuts

The following keyboard shortcuts allow easy access to the system-level functions available on the header:

Function	Shortcut
My Account	CTRL+F9
Help	CTRL+H
About	CTRL+F10
Log Out	CTRL+Q
Opens first listing in the Main Menu	CTRL+M

Screen-level keyboard shortcuts

The following keyboard shortcuts allow easy access to screen-level functions:

Function	Shortcut
Next record	CTRL+Down Arrow
Previous record	CTRL+Up Arrow
Copy record	CTRL+F or F4
New record	CTRL+N (not supported for Chrome) or F6
Save record	CTRL+S or F10
Reset screen	CTRL+R
Back/Previous screen	CTRL+Left or F11
Delete record	CTRL+D or CTRL+F6
Help (toolbar button)	ALT+H
EPAK	ALT+K
Open lookup	F9
Screen-level help	F1
Print screen	CTRL+P
Open/close the multi-field search on List View and Record View screens	F7
Execute a multi-field search	F8
Open the Jump to Screen popup	CTRL+F2
Clear the filter values and reset the operators in the multi-field search	ALT+C

Screen designer keyboard shortcuts

Keyboard shortcuts are keys or key combinations for system functions. The following keyboard shortcuts allow easy access to screen designer functions while in designer mode:

Function	Shortcut
Save layout	CTRL+S
Open group selection	CTRL+G
Exit screen designer mode	CTRL+I

Date keyboard shortcuts

The following keyboard shortcuts allow easy access to enter dates. Position the cursor in the date field prior to entering the shortcut steps.

Function	Shortcut
Specify the current date	Press SPACEBAR
Specify a specific date or partial date in the date field	Press numeric keys to enter the desired date and then press TAB to exit the field. The date is evaluated and displays the closest match in the required format. For example, if youenter 070102, the system displays Jul/01/2002.

Note: Use the "+" and "-" keys to change the date when the cursor is in the date field. Press the "+" key to add one day to the date. Press the "-" key to subtract one day from the date.

Accessing right-click options

The system includes two types of right-click menu options: system-level and screen-level. Right-click menu options are available when inserting or updating records.

Screen-level options

Screen-level options are displayed at the top of the right-click menu. The screen-level options change based on which screen is being accessed. A right-click menu option is displayed for each button that appears on the screen.

System-level options

System-level options are displayed at the bottom of the right-click menu. System-level options are common functions that are available on most screens, such as audit trail. See the following table for more information on right-click functionality at the system level:

Feature	Function
Audit Trail	Monitors attribute changes to records. See "Auditing Attributes" in the *Infor EAM System Administrator Guide*.
Add to Screen Cache	Adds the name of the screen as a tab at the bottom of the application.
Remove from Screen Cache	Removes the name of the screen as a tab at the bottom of the application.

Updating fields

A field is a single topic of information in a record. Required fields (noted by a shaded color) must be completed for a record to be valid.

Right-click in a field within a grid to update selected rows. Updating fields in Infor EAM follows the standard Windows controls for selecting rows:

- **CTRL+CLICK**
  Individually selects and unselects rows.

- **SHIFT+CLICK**
  Selects all rows between the clicked row and the most recently selected row. Shift+Click also unselects all rows that do not meet the criteria above.

The header at the top of the form will not update for subsequent selections; it will always show the first record selected. Therefore, if the **List View** page has multiple records selected, the system remains on the record displayed in the header. The multi-selection is lost when you leave the page.

If you click off the record that is currently being displayed in the header, the system displays the top-most selected record in the header.

Note: The update fields feature is available only on the following List View pages: Work Orders, Parts, Equipment, Requisitions, Purchase Orders, and User ID.

To update fields:

1. Select the records to update.
2. Right-click on a selected record, and then select **Update Field**.
3. Specify this information:

   Field
   Select the field to update.

   Note: Not all fields are available for update in the right-click options. If a field is Protected or Hidden, it is not included in the list. In addition, some fields with associated special business rules, i.e., prompting the user with a yes/no question, are excluded.

   New Value
   Specify the new value for the field.

   Set Value to Null
   Select to set the field to null.

4. Click **Submit**.

Managing lists

The system often displays information in tabular format, such as list view pages, the **Asset Warranties** page containing a list of items, and any lookup. Select a row in a list to view record details or select data from a list view. You can also quickly sort, filter, re-arrange or resize fields if the system defaults do not suit your needs.

Selecting rows in a list

Select rows in a list to view the record associated with the row, to copy the row data from a lookup to fields on a page, or to specify records on which to perform an action

To select rows in a list:

1 Open any page or lookup containing a list of records.

2 Click anywhere in the row to select the row.

3 Choose one of the following options:

Option	Description
Perform an action on the selected row	Click the button corresponding with the action.
If the row is in a list view, view the details of the record associated with the row	Double-click the row.
If the row is in a lookup list view, copy the row data to fields on the original page	Double-click the row (or select the row, and then click **OK**).

Defining quick filters on forms

Filter a list of records on forms to display only those records that meet your specified criteria.

Note: The system applies the filter in addition to any filter criteria specified in a Dataspy that is applied to the list.

Note: To filter multiple fields simultaneously on the list view, click **Grid Menu**, and then select **Show Filter Row**. The system displays the filter row on the list view. Select the operators for multiple fields, click **Filter Menu**, and then click **Run Filter**. The system displays the records matching the filter criteria.

To define quick filters on forms:

1 Open any form containing a list of records.

Note: On list views, the system displays the number of records that were located using the specified Dataspy on the filter bar.

2 Select the **Filter** field on which to filter from the first drop-down list.

Note: For forms that include custom fields, the custom fields are displayed at the end of the filter drop-down list. Only custom fields associated to the entity of the screen AND associated to a class with an organization for which the user has query rights will be displayed. If more than one entity exists for the screen, then only the primary entity will be used.

The field being queried, which is the first field of the three, defaults to the first column in the grid unless the first column is a non-data bound select checkbox. To change the default quick filter, modify the grid layout then save the changes.

See "Saving the list layout" on page 20.

The operator of the quick filter, which is the second field of the three, can default to Starts With or Contains. Set the value of the QUICKDEF install parameter to S or C.

3 Select an operator from the second drop-down list. See the following table for operator options:

Operator	Definition
Starts With	Search for items with a description that begins with the entered value.
Equals	Search for items with a value equal to the entered value.
Does Not Equal	Search for items with a description that does not equal the entered value.
Contains	Search for items with a description that contains the entered value.
Does Not Contain	Search for items with a description that does not contain the entered value.
Ends With	Search for items with a description that ends with the entered value.
Is Empty	Search for items with a description that has no entered value.
Is Not Empty	Search for items with a description that has any entered value.
Less Than	Search for items with a value less than the entered value.
Greater Than	Search for items with a value greater than the entered value.
Less Than or Equals	Search for items with a value less than or equal to the entered value.
Greater Than or Equals	Search for items with a value greater than or equal to the entered value.
Selected	Search for items where the checkbox is selected. This applies to checkbox fields only.
Not Selected	Search for items where the checkbox is not selected. This applies to checkbox fields only.
Either Selected or Not Selected	Search for items where the checkbox is either selected or not selected. This applies to checkbox fields only.

4 Enter the value for which to filter in the third field.

Note: If the field on which you are filtering is displayed on a Record View page, the third field in the quick filter will display according to that field type: text box, drop-down list, lookup, checkbox, or calendar.

5 Click **Run**.

Defining quick filters on lookups

Filter a list of records on lookups to display only those records that meet your specified criteria.

Note: The system applies the filter in addition to any filter criteria specified in a Dataspy that is applied to the list.

To define quick filters on lookups:

1 Open any lookup containing a list of records.

2 Select the **Filter** field on which to filter from the first drop-down list.

Note: For forms that include custom fields, the custom fields are displayed at the end of the filter drop-down list. Only custom fields associated to the entity of the screen AND associated to a class with an organization for which the user has query rights will be displayed. If more than one entity exists for the screen, then only the primary entity will be used.

3 Select an operator from the second drop-down list. See the following table for operator options:

Operator	Definition
Starts With	Search for items with a description that begins with the entered value.
Equals	Search for items with a value equal to the entered value.
Does Not Equal	Search for items with a description that does not equal the entered value.
Contains	Search for items with a description that contains the entered value.
Does Not Contain	Search for items with a description that does not contain the entered value.
Ends With	Search for items with a description that ends with the entered value.
Is Empty	Search for items with a description that has no entered value.
Is Not Empty	Search for items with a description that has any entered value.
Less Than	Search for items with a value less than the entered value.

Operator	Definition
Greater Than	Search for items with a value greater than the entered value.
Less Than or Equals	Search for items with a value less than or equal to the entered value.
Greater Than or Equals	Search for items with a value greater than or equal to the entered value.

4 Enter the value for which to filter in the third field.

Note: If the field on which you are filtering is displayed on a **Record View** page, the third field in the quick filter will display according to that field type: text box, drop-down list, lookup, checkbox, or calendar.

5 Click **Add Line** to add additional lines to the filter.

6 Click the **AND/OR** hyperlink to select one of the following join operators:

Option	Description
Include records that include all joined conditions	Select **AND**.
Include records that contain one or the other condition	Select **OR**.

7 Click **(** or **)** to add a parenthesis to the highlighted row. These parentheses are used when running a query to group statements together when mixing AND and OR statements.

8 Specify additional conditions by which to filter as necessary.

9 Select the **Default Dataspy** check box to make the Dataspy the default Dataspy for the form.

10 Click **Run**.

Note: You can also press **ENTER** to display the records matching the filter criteria.

Sorting lists

Sort a list of records by any column in the list in ascending or descending order.

To sort lists:

1 Open any screen containing a list of records.

2 Choose one of these options:

Option	Description
Sort the records in descending (Z-A) order	The default sort order is descending. Click the column header of the column by which to sort the list until the system shows **Sort Descending** on the header.
Sort the records in ascending (A-Z) order	Click the column header of the column by which to sort the list until the system shows **Sort Ascending** on the header.

Arranging columns in a list

Arrange the order in which columns in a list are displayed.

To arrange columns in a list:

1. Open any page or lookup containing a list of records.
2. Click and hold the column header of the column to move.
3. Holding the mouse button down, drag the header on top of the column header next to which you want the column to appear until the target column header is highlighted.

   Note: If the column header is dragged from left to right, the column header is placed after the target column. If the column header is dragged from right to left, the column header is placed before the target column.
4. Release the mouse button. The column is arranged in the specified order.

   Note: To save the order and sizes of the columns, click **Save Record** in the upper-right part of the list view.

Resizing columns in a list

Specify the widths of columns in a list.

To resize columns in a list:

1. Open any page or lookup containing a list of records.
2. Position your mouse over the right-hand border of the column to resize.
3. Click and hold the column border, and then drag the border in the desired direction to increase or decrease the width of the column.
4. Release the mouse button.

   Note: To save the order and sizes of the columns, click **Grid Menu** in the upper-right part of the list view. Select **Save Grid Layout**.

Saving the list layout

After arranging the columns in the list view, save the layout to be used each time you return to that screen.

To save the list layout:

1. Open the form for which to save the layout.
2. Modify the page layout as necessary.
3. Click **Grid Menu** in the upper-right part of the list view.
4. Click **Save Grid Layout**.
5. Click **OK**.

Copying records

Use the Copy Record toolbar button to copy information from one record to another record within the same form. Copying a record creates an editable copy of the record that contains the same base data. The **Copy Record** button is only available on forms that have List View and Record View pages, and it is only enabled on the **List View and Record View** pages.

Note: To copy a record, you must have insert rights for the organization of the record you are copying.

To copy records:

1. Open the form for which to copy records.
2. Select the record to copy, and then click **Copy Record**. The system copies values from the previously selected record to the new record, including custom fields, and displays the form in insert mode.

   Note: To maintain certain business and security rules, some displayed fields may not copy over to the new record. Verify all copied data before saving the record.

3. Modify the record as necessary.
4. Click **Save Record**.

Exporting records

Export records from to a Microsoft Excel file to extract information from the database without making an external connection, e.g., from outside of the system, to the database. The file can be viewed using Microsoft Excel.

Note: The export to Excel function exports a maximum of 64,000 records.

To export records:

1. Open the form from which to export records.

   Note: The system will export the results of the last query performed, even if you are not currently viewing those records (e.g., if you cleared the form or if this exceeds the limit of what is displayed on the grid).

2. Click **Grid Menu**.
3. Click **Save Grid to Excel**.
4. Save the file as necessary.

Displaying the total record count

All list views have the ability to display the total record count, even if this count exceeds the current maximum number of records that can be displayed in the list view.

To display the total record count:

1 Open the form for which to display the total record count.
2 Click **Show Total Record Count**.
3 Click **OK**.

Using a Dataspy

A Dataspy is a named, predefined view of a list of records or set of data that can be used on any page, lookup, or data area that contains that same list of records.

A Dataspy consists of the following four basic components:

- **Filter**
  Contains the conditional statements that make up a filter. For example, a Dataspy might filter for all requisitions that have a**Status** "equal to" Approved, and a **Creation Date** "greater than" last Friday.

- **Sort**
  Specifies the order in which the records should be sorted. For example, a Dataspy might sort the requisitions so that the most recently created requisitions are displayed at the top of the list in descending order.

- **Layout**
  Specifies the fields that are displayed in the list and the order in which those fields should be displayed. For example, a Dataspy might specify that the **Requisition Description** column is displayed to the left of the **Requisition Number** column and that the **Storeroom** field is not displayed in the list.

- **Advanced**
  Specifies an additional Where clause used for filtering data. The Where clause is appended to the Where clause generated by the Dataspy Filter.

Note: You can also specify column order by arranging the columns in a list view.

If a custom field saved in a Dataspy is ever unassociated, then that custom field will no longer appear in the Dataspy nor will it impact the Dataspy. If the same custom field is ever associated again, the relationship in the Dataspy will automatically be restored.

Editing an existing Dataspy

Edit the values in an existing Dataspy.

Note: The system automatically includes a number of predefined public Dataspies. Only a system administrator can modify the public Dataspies.

To edit an existing Dataspy:

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.

   Note: You can select a different Dataspy name from the drop-down list on the Dataspy editor header.

2 Edit the Dataspy criteria as necessary.

   Note: Click **Run** to apply the Dataspy to the list without saving changes.

   Select the **Default Dataspy** check box to save the selected Dataspy as the default.

3 Click **Save**. The system applies the Dataspy to the list view from which the Dataspy editor was launched.

   Note: You can only edit and save Dataspies that you created. If you edit a system-delivered Dataspy, the system goes into Copy mode.

Creating and saving a new Dataspy

To create and save a new Dataspy:

1 Open an existing Dataspy from a list view, and then click **New**.
2 Specify a title for the Dataspy in the text box.
3 Edit the Dataspy criteria as necessary.

   Note: Click **Run** to apply the Dataspy to the list without saving changes.

   Click **Cancel New** to cancel the creation of a new Dataspy and return to the previous view.

   Select **Default Dataspy** to save the selected Dataspy as the default.

   You can also press **ENTER** to display the records matching the filter criteria.

4 Click **Save**. The Dataspy is applied to the list view from which the Dataspy editor was launched.

Creating a copy of an existing Dataspy

Copy the values from an existing Dataspy into a new Dataspy and edit the criteria as necessary.

To create a copy of an existing Dataspy:

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.
2 Click **Copy**.
3 Modify the title for the Dataspy in the text box as necessary.
4 Edit the Dataspy criteria as necessary.

   Note: Select **Default Dataspy** to save the selected Dataspy as the default.

5 Click **Save**. The Dataspy is applied to the list view from which the Dataspy editor was launched.

Deleting a saved Dataspy

To delete a saved Dataspy:

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.
2 Click **Delete**.

   Note: You can only delete Dataspies that you created.

Specifying Dataspy criteria

Specify the filter, sort, layout, and advanced criteria when creating, editing, or copying a Dataspy. When the Dataspy is applied to a list, the system displays only the records that match the specified filter criteria in the sort order and layout specified.

Specifying Dataspy filter criteria

Select the fields, conditions, and values upon which to filter a list of records.

To specify Dataspy filter criteria:

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.
2 Click **Filter** from the left-hand column of the Dataspy editor.
3 Select a field on which to filter from the first drop-down list.
4 Select an operator from the second drop-down list.

   See the following table for operator options:

Operator	Definition
Starts With	Search for items with a description that begins with the entered value.
Equals	Search for items with a value equal to the entered value.
Does Not Equal	Search for items with a description that does not equal the entered value.
Contains	Search for items with a description that contains the entered value.

Operator	Definition
Does Not Contain	Search for items with a description that does not contain the entered value.
Ends With	Search for items with a description that ends with the entered value.
Is Empty	Search for items with a description that has no entered value.
Is Not Empty	Search for items with a description that has any entered value.
Less Than	Search for items with a value less than the entered value.
Greater Than	Search for items with a value greater than the entered value.
Less Than or Equals	Search for items with a value less than or equal to the entered value.
Greater Than or Equals	Search for items with a value greater than or equal to the entered value.
Selected	Search for items where the checkbox is selected. This applies to checkbox fields only.
Not Selected	Search for items where the checkbox is not selected. This applies to checkbox fields only.

5 Enter a value for which to filter in the third field.

Note: Enter relative dates by specifying + or – with units in days. For example,"-1" is one day back, and last week would be >="-7".

6 Click the **AND/OR** hyperlink to select one of the following join operators:

- **Include records that include all joined conditions**
  Select **AND**.

- **Include records that contain one or the other condition**
  Select **OR**.

7 Click **(** or **)** to add a parenthesis to the highlighted row. These parentheses are used when running a query to group statements together when mixing AND and OR statements.

8 Enter additional conditions by which to filter as necessary.

Note: Click **Add Line** to add additional lines to the filter.

To remove a filter line, choose the blank selection from the first drop-down list.

Specifying Dataspy sort criteria

Select the order in which to sort a list of records.

To specify Dataspy sort criteria:

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.

2 Click **Sort** from the left-hand column of the Dataspy editor.

3 Specify this information:

1st
Select the first field by which to sort the records.

Click to select one of the following sort orders:

- **Sort Ascending**
  Select to sort records either alphabetically or numerically by the selected field (ascending).

- **Sort Descending**
  Select to sort records in either reverse alphabetical or reverse numerical order by the selected field (descending).

4 Enter additional fields by which to sort as necessary.

Note: To remove sort criteria, choose the blank selection from the drop-down lists.

5 Click **Save**.

Specifying Dataspy layout criteria

Select the columns to display when the Dataspy is applied to a list of records, and then specify the order in which the fields will be displayed.

Additionally, the system allows you to specify the number of records that the system will retrieve before it retrieves another set of records from the database in a list view. This setting does not affect the height of a table (i.e., the number of rows that are shown without scrolling the table). This setting is important because it will affect the speed at which the system downloads and displays a list containing a large number of records.

For example, if the value is set at 100 (the default), the system will only download the first 100 records that match the criteria specified in the selected Dataspy. When you scroll to the end of the 100 records, the system will download and display the next 100 records that match the criteria specified in the Dataspy. If the value is set to 300, then the system will not display any of the records until it has downloaded all 300 records.

To specify Dataspy layout criteria:

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.

2 Click **Layout** from the left-hand column of the Dataspy editor.

Available Fields lists all fields that are available but not visible in the list of records, while **Visible Fields** lists all fields displayed as columns in the list of records.

See the following table when selecting or ordering fields:

Function	Procedure
Add a field	Select the field in **Available Fields**, and then click **Add a field**.
Remove a field	Select the field in **Visible Fields**, and then click **Remove a field**.
Add all fields	Click **Add all fields**.
Remove all fields	Click **Remove all fields**.
Reorder fields	Select the field in **Visible Fields**, and then click either **Reorder up** or **Reorder down** to move the field up or down in the order.

3 Specify this information:

Number of data rows to retrieve
Enter the number of rows that the system will retrieve in the list view before it downloads another set of rows.

4 Click the field to select, and then see the table above when selecting or ordering fields.

5 Click **Save**.

Specifying Dataspy advanced criteria

To specify Dataspy advanced criteria:

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.

2 Click **Advanced** from the left-hand column of the Dataspy editor.

3 Specify this information:

Where Clause
Enter an additional Where clause as necessary. The Where clause is appended to the Where clause generated by the Dataspy Filter. The Where clause will be appended with an "AND" statement if a Filter has been specified.

4 Click **Test Where Clause**.

Note: Click **Display SQL Statement** to view the entire SQL statement. The **SQL Statement** field is read-only.

Viewing the Start Center

View inbox entries, KPIs, and charts on the **Start Center** page.

To view the **Start Center**:

1 Log in to Infor EAM.

Note: To return to the **Start Center** from any other form, click **Start Center** on the header.

2 View the **Inbox**, **Chart Controls** and **KPIs** sections.

Note: The system automatically recalculates the values of inbox entries and the KPI data that have **Auto Refresh** activated when you open the **Start Center** page.

To manually refresh the inbox entries and KPIs, click **Refresh**.

Understanding the Start Center inbox

The inbox displays pending actions or activities (inbox entries) for users on the **Start Center** page. You can call screens necessary to complete actions or activities associated with inbox entries directly from the inbox. Inbox entries can either be user-group specific or public and can be assigned to specific user groups or defined as public entries that are displayed for all users.

Access the inbox by invoking the **Start Center**, or the system administrator can set up the inbox to open automatically when you log in to the system. Configure the inbox to refresh completely or selectively every time it is accessed.

The system administrator associates SQL select statements with inbox entries. These statements define inbox entries that query the database for the appropriate instances of an entry to retrieve to your inbox.

Depending on your system privileges, you can also modify the inbox by adding and/or deleting entries. You can also modify the order and sequence in which entries are displayed.

The system displays a description and value for each entry in the inbox. If a screen is selected for an entry during definition, the system administrator enters a Dataspy for the inbox entry to automatically query for and retrieve the records associated with an inbox entry to the called screen when it is invoked.

For example, the system administrator sets up an inbox entry to approve work orders for your company’s maintenance manager. When the maintenance manager accesses the **Start Center**, the SQL statement defined for the work order approval inbox entry queries the system database and displays an inbox entry to approve work orders in the inbox. The inbox entry indicates that there are three outstanding work orders to approve. The maintenance manager calls the **Work Orders** form directly from the work order approval entry on the inbox by double-clicking, and the Dataspy defined for the screen automatically retrieves the three work orders requiring approval on the **Work Orders** form.

The Inbox includes three tabs and pages of information: Operations, Maintenance, and Management. You can modify the text that appears on the three **Start Center** Inbox tabs. Contact your system administrator for more information.

Setting up the Start Center inbox

Set up the **Start Center** Inbox to display inbox entries specific to your job. Specify the default inbox tab and modify the sequence in which inbox entries are displayed in the inbox. You can also delete inbox entries.

Specifying the default Start Center inbox tab

The **Start Center** Inbox contains three tabs and pages of information: Operations, Maintenance, and Management. Specify which of the **Start Center** Inbox tabs you wish to display by default whenever you access the **Start Center**.

To specify the default **Start Center** Inbox tab:

1. Open the **Start Center** page.
2. Select the inbox tab to set as the default.
3. Click **Save as Default**.

Adding entries to the Start Center inbox

Add entries to the **Start Center** inbox to display entries that are specific to your job.

To add entries to the **Start Center** inbox:

1. Open the **Start Center** page.
2. Click **Personalize**.
3. Click **Insert Inbox Entry**.
4. Specify this information:

   Sequence Number
   Enter the sequence in which the inbox entry will be displayed in the inbox.

   Inbox Code
   Enter the inbox entry to add to the inbox. The system automatically populates the inbox description.

   Folder
   Select the folder on which to place the inbox entry.

5. Select the **Auto Refresh** check box to enable the system to automatically refresh the inbox every time the **Start Center** is invoked.
6. Click **Submit**.
7. Click **Close**.

Modifying the sequence of inbox entries

Modify the sequence in which inbox entries are displayed in the inbox.

To modify the sequence of inbox entries:

1. Open the **Start Center** page.

2 Click **Personalize**.
3 Select the inbox entry for which to modify the display sequence, and then enter a new value for **Sequence Number**.
4 Click **Submit**.
5 Click **Close**.

Accessing screens from the Start Center inbox

Access screens associated with inbox entries directly from the inbox.

To access screens from the **Start Center** inbox:

1 Open the **Start Center** page.
2 Locate the inbox entry for which to call a screen, and then double-click the entry.

   Note: The system automatically queries for and retrieves the records associated with the inbox entry to the called screen if you defined a Dataspy for the called screen when defining the inbox entry.

Understanding the Start Center KPIs

The **Start Center** displays key performance indicators (KPIs) and their scores. KPIs are user-defined parameters that measure productivity or efficiency. The system displays an icon and a score for each KPI on the **Start Center**. The **Start Center** enables you to view the status of your work environment with respect to the KPIs specific to your job, as well as your current score for each KPI. The scores for KPIs are calculated at regular intervals based on the KPI definition.

The system administrator defines and grants access to the KPIs. KPIs can either be user-group specific or public. Public KPIs can be displayed for all users.

Access KPIs on the **Start Center** or have the system administrator set up the Start Center to open automatically when you log on to Infor EAM. Depending on system privileges, you can configure the **Start Center** to display KPIs based on your preferences.

Note: The system only supports .gif files for the images displayed for KPIs on the **Start Center**.

Setting up the Start Center KPIs

Set up the KPIs specific to your job. Modify the sequence in which KPIs are displayed in the inbox. You can also delete KPIs.

Adding KPIs to the Start Center

Add KPIs to the **Start Center** to display the KPIs that are specific to your job.

To add KPIs to the **Start Center**:

1 Open the **Start Center** page.
2 Click **Personalize**.
3 Click **Insert KPI Entry**.
4 Specify this information:

 Sequence Number
 Specify the sequence in which the KPI will be displayed in the **Start Center**.

 KPI Code
 Specify the KPI to add to the **Start Center**. The system automatically populates the KPI description.

5 Select the **Auto Refresh** check box to enable the system to automatically refresh the KPI every time the **Start Center** is invoked.
6 Click **Submit**.
7 Click **Close**.

Modifying the sequence of KPIs

Modify the sequence in which KPIs are displayed on the **Start Center**.

To modify the sequence of KPIs:

1 Open the **Start Center** page.
2 Click **Personalize**.
3 Select the KPI for which to modify the display sequence, and then enter the new value for **Sequence Number**.
4 Click **Submit**.
5 Click **Close**.

Accessing screens from Start Center KPIs

Access screens associated with KPIs directly from the **Start Center**.

To access screens from **Start Center** KPIs:

1 Open the **Start Center** page.
2 Locate the KPI entry for which to call a screen, and then double-click the entry.

 A parent arrow in the KPI entry title indicates that the entry is a parent KPI. The arrow only appears when children have been added to the parent. The arrow does not automatically appear by selecting **Parent** during KPI setup.

 To access the children KPIs, click the parent arrow. The KPIs are refreshed and all child KPIs are displayed. Double-click the child KPI for which to call a screen.

 Note: The KPI entry to the called screen and the associated records are automatically queried and retrieved if you defined a Dataspy for the called screen when defining the KPI entry.

Managing your account

Change your e-mail address, system language, and/or login password as necessary.

Note: If you change your user password and have any report schedules in Infor EAM Advanced Reporting, you must renew your credentials in Infor EAM Advanced Reporting. Contact your system administrator for more information.

To manage your account:

1. Click **My Account** on the header.
2. Specify this information:

   Success Msg. Timeout
   Select the time frame for which you want the message bar to display success messages.

   E-mail
   Specify a new e-mail address as necessary.

   Language
   Select the language to use for your account.

   Note: If you modify **Success Msg. Timeout** or **Language**, you must log out, close all browser sessions, and then log in to see the changes.

   Current Password
   Specify the password you used to log in.

   New Password
   Specify the new password.

   Confirm Password
   Re-enter the new password.

   Note: If LDAP is enabled, the **Current Password**, **New Password**, and **Confirm Password** fields are not displayed.

3. Click **Save Record**.

Requests

2

To handle a request for work, Requestor uses work requests. You can adapt work requests to accommodate work orders.

Create, update, and approve reservation requests for equipment on a calendar.

Create operator checklist results for equipment, and then create follow-up work orders or deferred maintenance records for the checklist items.

Creating work requests

Create work requests for equipment that needs repairs, and then supervisors or authorized employees can either approve or reject them.

Note: Requestor users do not have access to functions involving custom fields.

To create work requests:

1. Select **Work > Work Requests**.
2. Specify this information:

   Description
   Specify a description of the work request.

   Equipment
   Specify an equipment number.

   Department
   Specify the department.

   Safety
   Select the checkbox if this work requires special safety precautions.

   Location
   Specify the parent location of the work to be done.

   Type
   Specify the type of work request.

Class
Specify the class of the work request.

Status
Specify the status of the work request. As a Requestor user, you can only select **Q**.

Priority
Specify the priority of the work request.

Sched. Start Date
Specify the sscheduled start date of the work request.

Cost Code
Specify the cost code for the work request.

Problem Code
Specify the code to identify the type of problem.

Assigned To
Specify the person responsible for the work.

Requested By
Specify the employee requesting the work.

Date Reported
Specify the date the work request was reported.

Req. Start Date
Specify the requested date to begin the work.

3 Click **Submit**.

Note: Click **Submit and Add Another** to create another request after the first request is submitted.

Click **Reset** to reset all values on the page to the last saved values.

Viewing and modifying work requests

Review the status of work requests and/or modify requests.

To view and modify work requests:

1 Select **Work > Work Requests**.

Note: Apply a Dataspy or filter, and/or sort work requests as necessary.

2 Double-click the row containing the request to view or modify.
3 View and modify work request details as necessary.
4 Click **Save Changes**.

Note: Click **Reset** to reset all values on the page to the last saved values.

System users cannot approve or reject work requests.

Creating operator checklist results for equipment

View and create checklist results for equipment and associated task plans on this form rather than the **Checklist** tab of the **Work Order** form. Optionally, create follow-up work orders or deferred maintenance activities for checklist items on this screen.After an operator checklist is created, complete or cancel it on this screen.

To create operator checklist results for equipment:

1 Select **Work > Additional Features > Operator Checklist > Operator Checklist**.

2 Specify this information:

Organization
Specify the organization of the operator of the checklist you are creating.

Equipment
Specify the equipment for which to create or view the checklist results.

Task Plan
Specify the task plan of the equipment.

3 Click **Create Checklist**. **Operator Checklist Number** and **Created By** are automatically populated.

4 Specify this information to modify the checklist items:

Job
Optionally, specify the job for which to modify operator checklist results, or select **Show All Records** to display all of the checklist items for the task plan, including pre-planned jobs or a job created specifically for the task plan.

Note: If the task plan **Planning Level** is set to **Job Plan**, select the job for which to create a planned labor record.

Alternately, if the task plan **Planning Level** is set to **Task Plan** and **Job** is set to **Show All Records** all of the records for the selected task plan are displayed.

Performed By
Specify the person performing the checklist.

Reviewed By
Specify the person reviewing the checklist.

5 Specify results of the checklist based on the checklist item:

Completed
Select the check box if **Type** is **Checklist Item**.

Select **Yes** or **No** if **Type** is **Question**.

Specify **Finding** if **Type** is **Qualitative**.

Specify **Value** if **Type** is **Quantitative** or **Meter Reading**.

Specify **Finding** and **Value** if **Type** is **Inspection**.

Notes
Include any relevant notes for the checklist item results.

6 Optionally, select the Final Occ. check box if the results entered represent the final occurrence of the specific checklist item. This only applies to repeating checklist items.
7 Optionally, select the Follow-up check box for specific checklist items to later generate follow-up work orders for the checklist item.
8 Click **Actions**, and then select **Create Follow-up WO** to generate follow-up work orders for all checklist items of the selected operator checklist record where **Follow-up** is selected and where **Follow-up WO-Activity** and **Deferred Maintenance No.** are not populated.
9 Click **Actions**, and then select **Create Deferred Maintenance** to generate a deferred maintenance activities record for the organization of the selected operator checklist, and the department of the equipment on the selected operator checklist.
10 Choose one of the following options

Move to Complete
Select to indicate the checklist is complete. The status is updated to **Complete Status**.

Move to Cancel
Select to cancel the checklist. The status is updated to **Cancel Status**.

11 Click **Submit**.

Creating equipment reservations

Create and modify equipment reservations on a calendar to request or reserve equipment records. Equipment reservations can be viewed in increments of minutes, hours, and days. Move reservations on the calendar screen to adjust start and end times for equipment records.

You should define defaults on the **Reservation Calendar** tab of the **Screen Setup** screen before reserving equipment on the **Reservation Calendar** screen.

You can only request or reserve equipment on this screen. All other status changes have to be done on the **Reservations** screen. If the equipment status is Issued, you can only change the **End Date**.

To create an equipment reservation:

1 Select **Equipment > Additional Features > Reservation Calendar**.
2 Select **Go To Day** to select a day for which to view reserved equipment.
3 Double-click a specific time period on the calendar to schedule the equipment.

Note: You can also create an equipment reservation by clicking on an empty grid on the calendar and dragging to the side to specify the duration. You can move existing reservations by clicking and dragging them to empty spaces on the grid.

4 Specify the **Title**, **Start Date**, **Start Time**, **End Date**, **End Time**, and **Status** of the reservation.
5 Specify this information:

Travel From (Minutes)

Travel To (Minutes)
Specify the amount of travel time needed for the equipment reservation.

Setup Time (Minutes)
Specify the amount of time needed for setting up the equipment.

Tear Down Time
Specify the amount of time needed for dismantling the equipment.

6 Select the **Private** check box to prevent users who did not create the equipment reservation from editing and seeing the details of the equipment reservation.

7 Select the **All Day** check box to change the **Start Date** and **End Dates** to midnight so the reservation will last all day.

8 Specify the **Work Order**, **Work Address**, and **Project** for the equipment reservation.

9 Optionally, specify the **Instruction 1** for **Supplier 1**. Repeat this step for **Supplier 2** and **Supplier 3.**

10 Optionally, specify the **Building Services**, **Building Services Email**, **Building Services Instruction** , and **Invitees** for the equipment reservation.

11 Specify **Vehicle Type**, **Issue To**, **Customer**, **Customer Contact**, **Reference**, **Cost Code**, **Phone Number**, **Work Phone Number**, **E-mail**, and **Driver's License No.** for the rental details.

12 Click **Submit**.

Viewing the reservation calendar

View equipment reservations on the **Reservation Calendar**. Unscheduled equipment can be scheduled on the calendar by double clicking on an empty time period or dragging and dropping to create a time period on the calendar. Reserved equipment can be modified by authorized users by moving the reservation to a different time period.

You can set up the default settings for the calendar on the **Reservation Calendar** tab of the **Screen Setup** screen.

To view the reservation calendar:

1 Select **Equipment > Additional Features > Reservation Calendar**.

2 Vew the **Reservation Calendar**.

3 Select **Go To Day** to select a day for which to view reserved equipment.

4 Rest on an equipment reservation record in the calendar grid to view the title and description of the equipment reservation.

   Note: You can only view and edit the reservation details if you created the reservation or if you are the Reservation Calendar owner.

5 Optionally, double-click a piece of equipment in the equipment grid to view all of the calendar reservations for that equipment.

Purchase requisitions

3

Create purchase requisitions to begin the purchasing process.

Creating purchase requisitions

Create a purchase requisition to request needed parts by specifying the requisition details and approval information on purchase requisition headers, adding parts to the requisition, and then submitting the requisition to the appropriate personnel for approval.

Note: Requestor users do not have access to functions involving the Quotation Indicator, Store-to-Store requisitions, repairable spares requisitions, and requisitioning parts-as-assets.

To create purchase requisitions:

1. Select **Materias > Requisitions > Part Requisitions**.
2. Specify the organization, and a description of the requisition.
3. Specify this information:

   Status
   Specify the requisition status. You can only select **Unfinished**.

   Store
   Specify the receiving store.

   Delivery Address
   Specify the address to where you want the part delivered.

   Cost Code
   Specify the cost code.

   Supplier
   Specify the supplier of the part.

   Work Order-Activity
   Specify the work order and activity.

   Note: Select an activity if the selected work order contains multiple activities.

   The work order and activity are copied to all parts. Modify this information as necessary.

Comments
Specify any comments concerning the requisition.

Requested By
Specify the name of the person requesting the part.

Default Approver
Specify the approver of the requisition.

4 Click **Submit**.

Adding parts to requisitions

After creating the requisition header, add parts to the requisition.

Search for an existing part via one of several criteria. Narrow your search or select any of the matches found and displayed. If you cannot find the part you need, create a new part.

To add parts to requisitions:

1 Select **Requisitions > Part Requisitions**.
2 Create a purchase requisition. See "Creating purchase requisitions" on page 39.
3 Click the Add Part tab.
4 Specify this information:

Part
Specify the part to add to the requisition.

Note: If the part is not located, create a new part by entering a description in the field adjacent to **Part ID**. A part number is assigned after you submit the requisition.

Qty. Required
Specify the number of parts to purchase, and then enter the unit of measure for the part.

Price
Specify the price per unit of the part.

Line Total
The total monetary value of the line(s) and the number of line(s) are displayed.

Comments
Specify any additional comments regarding the purchase requisition.

Requested Before
Specify the date that the requisition is due.

Delivery Address
Specify the address to where you want the part delivered.

Buyer
Specify the buyer of materials/services.

Commodity
Specify the commodity.

Work Order-Activity
Specify the work order and activity.

5 Click **Save** when you are finished adding parts.

Viewing and modifying requisitions

Review the status of requisitions and/or modify requisitions.

To view and modify requisitions:

1 Select **Requisitions > Part Requisitions**.

Note: Apply a Dataspy or filter, and/or sort requisitions as necessary. See "Sorting lists" on page 19 and "Using a Dataspy" on page 22.

2 Select the requisition for which to view or modify.
3 On the Record View tab, view and modify requisition details as necessary.
4 Click **Submit**.