Peregrine

ServiceCenter

Request Management Guide

Release 5.1

PART NO: SCT-5.1-ENG-01016-00233

Peregrine SYSTEMS

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This edition applies to version 5.1 of the licensed program.

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Request Management Introduction

Request Management is an integral component of the ServiceCenter system. It provides automated ordering, manager approval, and tracking of assets through the different phases of their life cycles, from requesting, ordering and procurement to delivery and installation.

Read these chapters for information about Request Management.

See these appendices for explanations about some Request Management processes and terms.

Knowledge Requirements

The instructions in this guide assume a working knowledge of Peregrine Systems ServiceCenter and the installation platform. You can find more information in the following guides.

- For information about a particular platform, see the appropriate platform documentation.
- For information about customizing your environment using parameters, see the *ServiceCenter Technical Reference* guide.
- Before you run the ServiceCenter server, see the *ServiceCenter User's Guide*.
- For administration and configuration information, see the *ServiceCenter System Administrator's Guide* or the *ServiceCenter Application Administration Guide.*
- For database configuration information, see the *ServiceCenter Database Management and Administration Guide.*
- For copies of the guides, download PDF versions from the CenterPoint web site using the Adobe Acrobat Reader, which is also available on the CenterPoint Web Site. For more information, see *Peregrine's CenterPoint Web Site* You can also order printed copies of the documentation through your Peregrine Systems sales representative.

Examples

The sample windows and the examples included in this guide are for illustration only, and may differ from those at your site.

Contacting Customer Support

For more information and help with this new release or with ServiceCenter in general, contact Peregrine Systems' Customer Support.

Peregrine's CenterPoint Web Site

You can also find information about version compatibility, hardware and software requirements, and other configuration issues at Peregrine's Centerpoint web site: *http://support.peregrine.com*

1 Log in with your login ID and password.

2 Select **Go** for **CenterPoint**.

3 Select **ServiceCenter** from **My Products** at the top of the page for configuration and compatibility information.

Note: For information about local support offices, select **Whom Do I Call?** from **Contents** on the left side of the page to display the **Peregrine Worldwide Contact Information**.

Corporate Headquarters

Address:	Peregrine Systems, Inc. Attn: Customer Support 3611 Valley Centre Drive San Diego, CA 92130
Telephone:	+1 (858) 794-7428
Fax:	+1 (858) 480-3928

North America and South America

Telephone:	+1 (800) 960-9998 (US and Canada only, toll free) +1 (858) 794-7428 (Mexico, Central America, and South America)
Fax:	+1 (858) 480-3928
E-mail:	support@peregrine.com

Europe, Asia/Pacific, Africa

For information about local offices, see *Peregrine's CenterPoint Web Site* on page 10. You can also contact *Corporate Headquarters*.

Contacting Education Services

Training services are available for the full spectrum of Peregrine Products including ServiceCenter.

Current details of our training services are available through the following main contacts or at:

http://www.peregrine.com/education

Address:	Peregrine Systems, Inc. Attn: Education Services 3611 Valley Centre Drive San Diego, CA 92130
Telephone:	+1 (858) 794-5009
Fax:	+1 (858) 480-3928

CHAPTER 1

Request Management Overview

ServiceCenter's process flow when ordering items and services includes out-of-box catalog choices, making it possible for you to order bundled items and services. You do not have to wait to order line items after the quote has been opened, but you can do it all up front. You also have the option to add more line items to your order later, if needed.

If you find yourself asking when you should use Request Management versus Change Management, here are some guidelines.

- Request Management is designed to handle common user requests for products and services. These requests will usually only affect the person making the request, or a small group of people for which the requestor is responsible.
- Change Management is designed to handle any change to your business environment that will modify or disrupt the current state of that environment. Usually these modifications, or disruptions, will affect multiple users or business units.

Key Request Management features include:

- Automated request, manager approval, and order processing tracking for products and services.
- Detailed, customizable catalog of products and services, including bundled and sequenced parts and services.
- Scheduling and integration of service requests and work orders with purchase requests.

- Combination of multiple quotes into single or multiple orders, based on vendor.
- Provision for external vendors and internal work groups.
- Integration with other ServiceCenter applications, such as Inventory Management and Change Management.
- Integration with other Peregrine Systems products, such as Asset Center and Facility Center.
- Sequential and Conditional on-line request entry and approvals.
- Automated Mail Notification and Alerts for normal and exceptional events.
- Customer Control and consolidation of acquisitions and lifecycle management.
- Request—>Order—>Receiving—>Posting process.

The front-end and most often encountered component of Request Management is the catalog. The catalog contains lists of items that are available for request, as well as bundled Request Categories, which include Customer Procurement Requests, Human Resources, and Employee Office Move with their components and lists of item types.

The Master Catalog allows the user to select a predefined set of hardware, software, and services, which constitute an item. This item, in turn, is available for order through the catalog and all associated components are included in the order. For example, the *New Employee Setup* item within the *Human Resources* category includes associated components, such as office furniture, CPU with monitor and mouse, and network connectivity. The user orders the one item, *New Employee Setup*, then orders for all the components of the ordered item are sent out. Each component is then tracked as the order is processed, the product is received, and the product is installed or delivered to the user's site.

Many features of the Request Management application are available to the administrator (*FALCON*) login only. The following sections include instructions for using Request Management when logged in as *FALCON*, *SUSIE.SUPERTECH*, or *MAX.MANAGER*.

Process Flow

Figure 1-1 shows the workflow for Request Management.

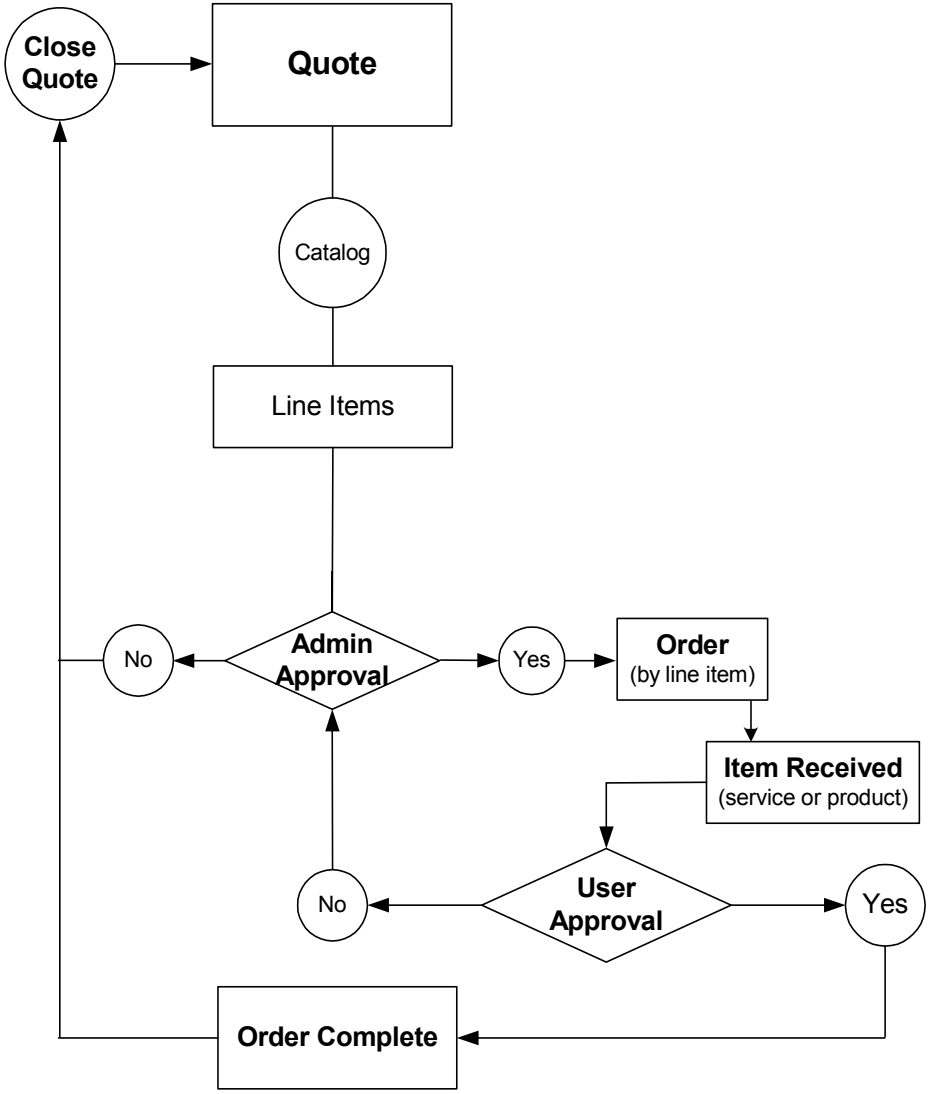

Figure 1-1: Request Management Process flow

Sample Operation

Your access to Request Management features will vary, depending on how you have logged in. For example, while *FALCON* has access to opening orders, approving quotes, and processing orders, the *SUSIE.SUPERTECH* login will only allow you to update work orders assigned to you.

Opening a Quote

To open a quote (using *FALCON* login):

1 From the system administrator's home menu, select **Request Management**. Figure 1-2 shows the Request Management main menu.

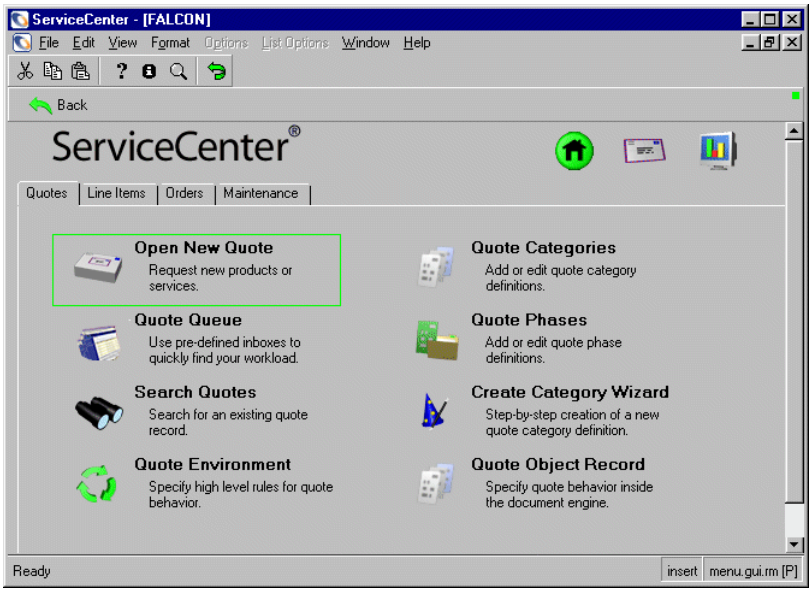

Figure 1-2: Request Management main menu

2 From the Request Management main menu, click **Open New Quote.** Figure 1-3 shows a QBE list of master categories. Select a master category from the list. For this example, select *Customer Procurement Requests.*

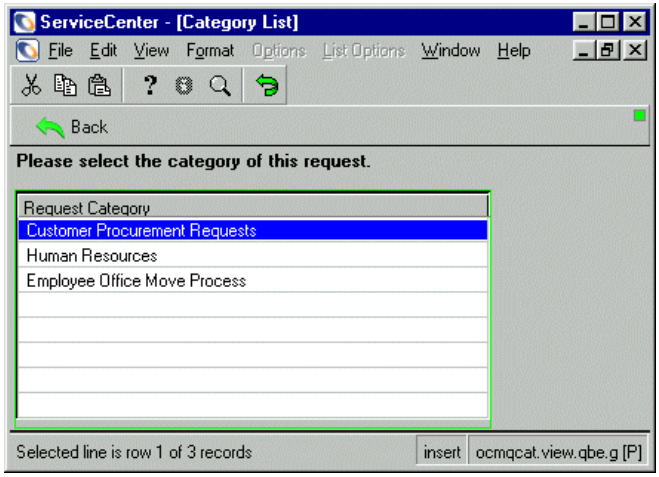

Figure 1-3: QBE List of master categories

3 Figure 1-4 shows a group of further subdivided line item categories.

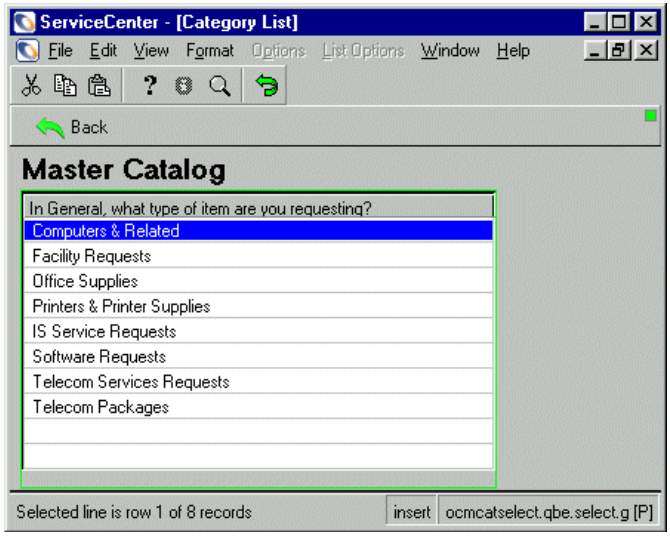

Figure 1-4: Line item categories within a master category

4 Your selections within the Master Catalog help you to specify the type of item you are requesting. For example, when you double-click *Computers & Related*, ServiceCenter displays a QBE itemized list of computer and related items, as shown in Figure 1-5.

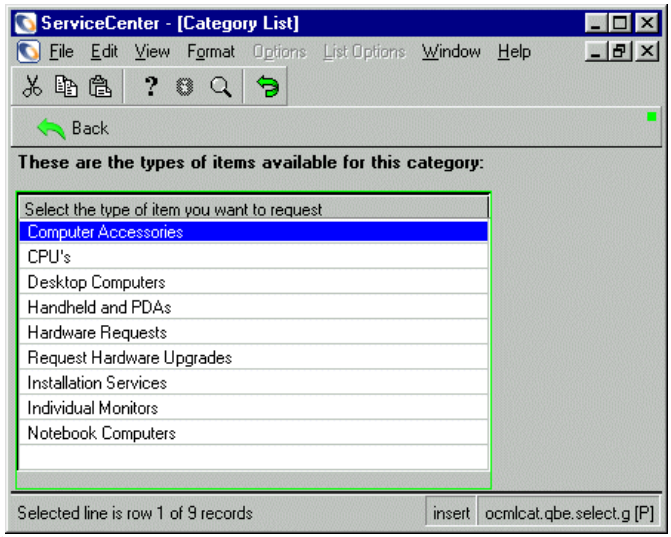

Figure 1-5: QBE list of computer and related items

5 Select the item you would like to order. For this example, select *Individual Monitors*. As you can see, the categories continue to partition into smaller itemized lists. For this example, Figure 1-6 shows a list of available parts that are various sizes of monitors.

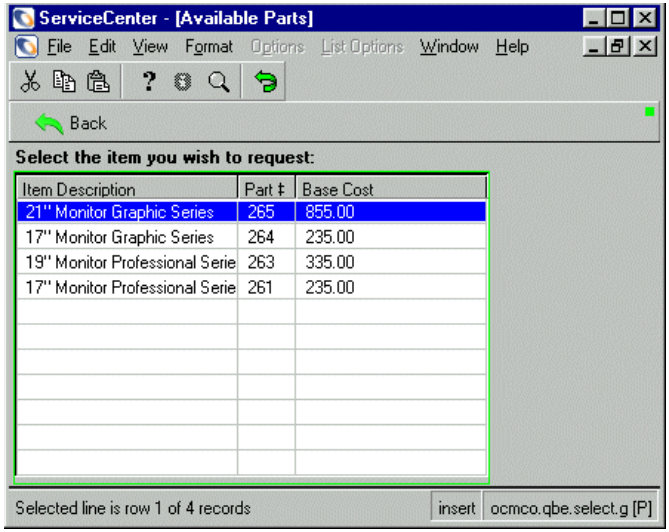

Figure 1-6: Selecting an item type from the QBE list

6 For this example, we will select the needed part. Select the 17" monitor, professional series. Figure 1-7 on page 20 shows the Request Management confirmation screen that enables you to:

- Cancel your order
- Add more items to your order
- Submit your final request to order items

Figure 1-7 shows a request for an order.

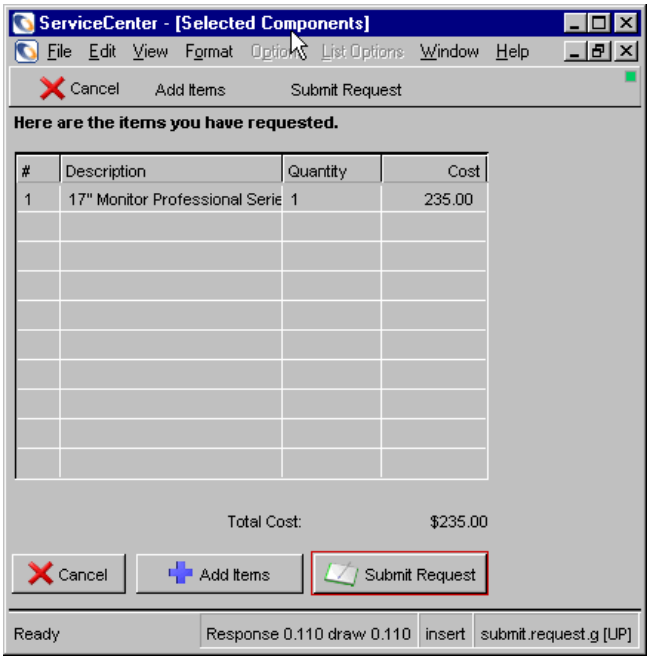

Figure 1-7: Submitting a request for order

1 Select **Submit Request** to submit your request.

2 Figure 1-8 shows the form where you can supply information specific to placing the quote, including, user name, department, and telephone number.

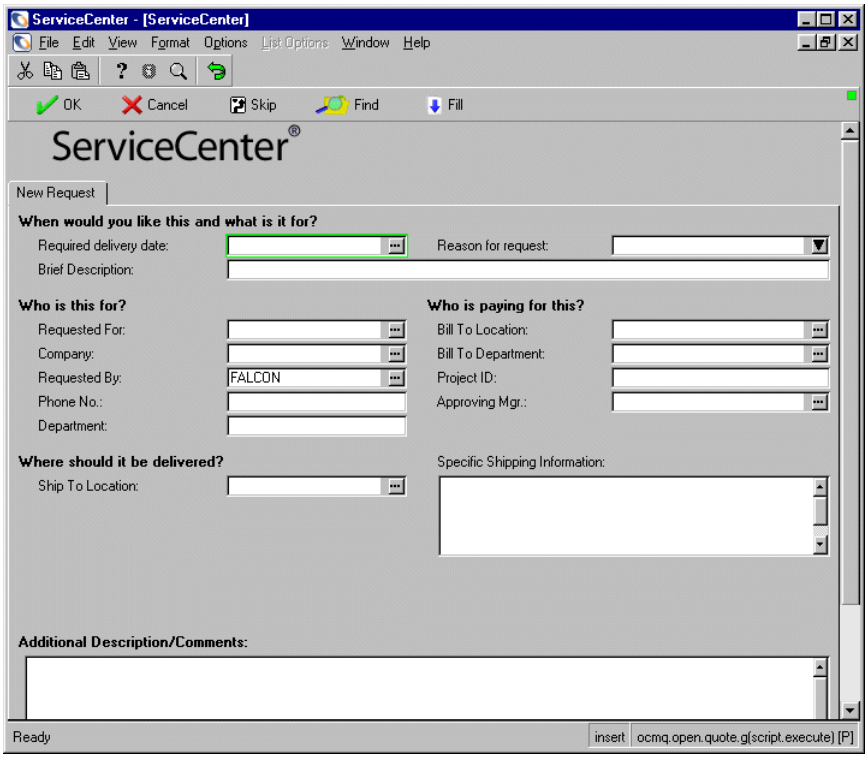

Figure 1-8: New Quote Form

3 Do one of the following:

- If you have the information, enter it in the appropriate fields and click **OK**.
- Click **Fill** in the **Requested for** field to access the search dialog box and open a QBE list of available contacts.

To search for a contact name:

▶ Do one of the following:

- Position the cursor in the **Contact Name** field and enter the name or portion of the name of the contact record you want to locate. Press **Enter** or click **Search**.

- Leave the fields blank and click **Search** to perform a *true* query and retrieve a list of current contact records. Figure 1-9 shows the QBE list of contacts. Double-click the contact who is placing the request.

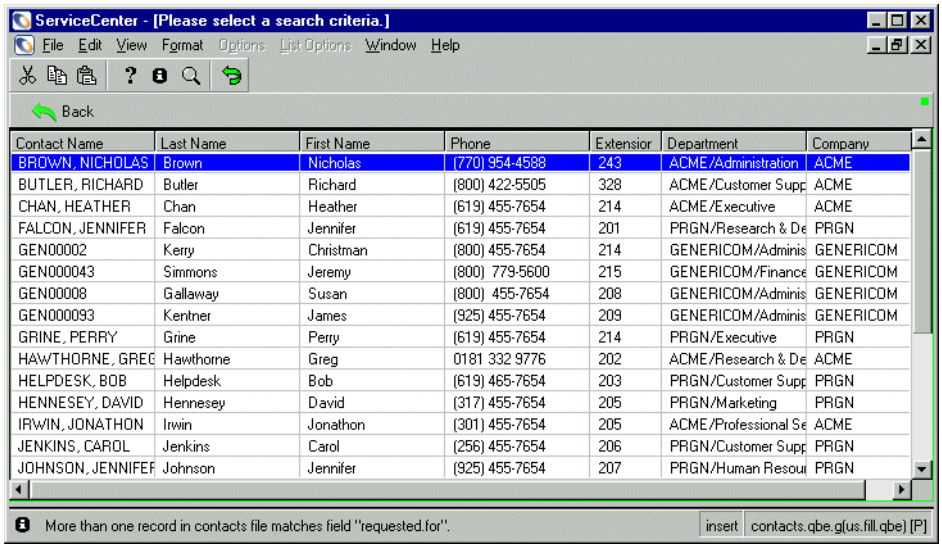

Figure 1-9: QBE List of Contacts

Note: If this contact is associated with more than one device, a second QBE list is displayed.

The initial quote screen redisplays with the contact information populated.

4 Continue filling in other information, such as required delivery date and reason for request.

5 When you have filled in the contact information, click **OK** to submit the quote. Figure 1-10 on page 23 shows the Request Management Summary form with order information. Notice the status bar at the bottom of the screen indicates that this order is in the approval phase. Other pieces of information you can view in this summary are:

- detailed contact information
- bundled items requested
- total line items of order(s)
- current approvals and Approval log

- information about the person who requested the order
- related incidents, changes, or calls

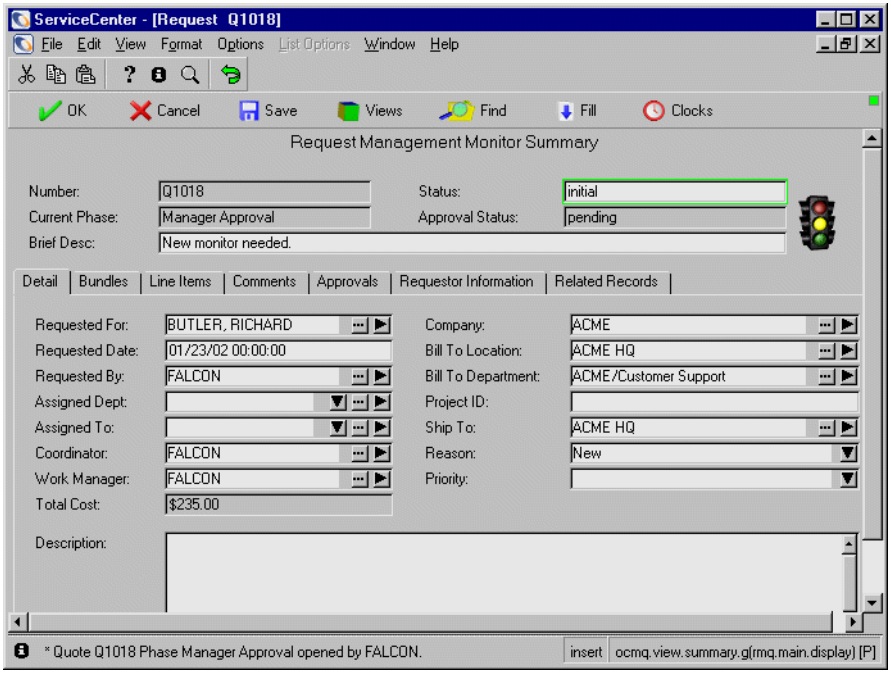

Figure 1-10: Request Management Summary screen

6 When you are finished, click **Save** to save the record or click **OK** to save the record and return to the Request Management main menu.

Request Management Options

The options and list options differ slightly between new forms and existing forms.

Options Menu

When you are opening a new or existing quote, the **Options** menu contains the following options.

Option	Description
Print	Prints the current record to the default printer.
Audit History	Enables revision tracking.
Database Manager	Opens the Database Manager, which accesses records from any of ServiceCenter's files.
Search Duplicates	Queries the Request Management database for duplicate orders. The search is based on the data entered in the current form.
Validity Lookup	Checks the selected field against the ServiceCenter validity tables for that field.
Related	
Related|Incidents|Open	Allows you to open the associated Incident ticket. For more information, see *Related Records* on page 26.
Related|Incidents|Associate	Allows you to associate this quote to an Incident ticket. For more information, see *Related Records* on page 26.
Related|Incidents |View	Allows you to view the associated Incident ticket. For more information, see *Related Records* on page 26.
Related|Calls|Associate	Allows you to associate this quote to a call. For more information, see *Related Records* on page 26.
Related|Calls|View	Allows you to view the associated call. For more information, see *Related Records* on page 26.
Related|Changes|Associate	Allows you to associate this quote to a Change Request. For more information, see *Related Records* on page 26.

Option	Description
Related|Changes|View	Allows you view the associated Change Request. For more information, see *Related Records* on page 26.
Line Items	View individual records for line items in a quote.
New Line Item	Add a new line item to the existing quote.
View Actual Order Lines	View line items of an order in the Bundled view to see details about the order, including line item number, description, quantity, and cost.
Change Category	Allows you to change the category of the quote.
Change Phase	Allows you to change the phase of the current order.
Logs	
Logs|Phase Log	Lists quotes and their current phase.
Logs|Alert Log	Lists quotes and their alert status.
Logs|Approval Log	Lists approval actions.
Current Alerts	Lists currently scheduled and active alerts.
Approval > Approve | Deny	When your login is part of an approval group, this option allows you to approve, deny, or you can retract a quote that you created.
List Pages	Allows you to list all the pages associated with this quote.
Calculate Impact	Allows you to calculate the risk of this quote or order against records with defined weighted values.
Copy and Open	Allows you to copy a single line item or multiple line items of an existing quote to open a new quote.
Expand Array	Add a field to an array (list of elements of the same data type accessed by an index or element number). A separate window is displayed to enter the data.
Generate Maintenance	The Database Manager utility enables you to manipulate tasks for this record. Database Manager is covered in the *ServiceCenter System Tailoring Guide*.

List Options Menu

When you are updating an existing Request Management quote, the List Options menu contains the following list options.

List Option	Description
Count	Counts the records displayed in a record or QBE list. The total is displayed in the status bar at the bottom of the window.
Print Records	Allows you to print all the information within a record, including the updates.
Print List	Allows you to print a record, multiple records, or a QBE list.
Refresh	Refreshes the record or QBE list display.
Modify Columns	Allows you to edit column headings in a record or QBE list. For more information, see the *ServiceCenter User's Guide*.
Save as Inbox	Allows you to save the current list as an inbox.

Related Records

The Options menu allows you to create an association between existing records, view a list of associated records, and open new records. The Request Management **Options** menu allows you to work with incidents, changes, and calls.

Opening a Related Record

You can open a Change Management change or an Incident Management incident ticket from Request Management. The new record will be related to an existing quote. For this example, we'll open an Incident Management incident ticket.

To open a related record from Request Management:

1 Display an existing Request Management quote.

2 Open the **Options** menu and highlight **Related|Incidents**.

3 Click **Open**.

The Incident Select Category form will display. Select a category and fill out the form. Refer to the appropriate chapters (Service Management, Incident Management, and Change Management) in the *ServiceCenter User's Guide* for help in filling out the form.

4 Save the related record. Click **Qopen**. You will be returned to the initial Request Management quote.

Associating a Quote with Another Record

You can associate a Request Management quote with an existing Service Management call report, an Incident Management incident ticket, or Change Management change. Before associating a quote with another record, make note of the record's ID number. For example, a call report could have an ID number of *CALL1001*. You will need to enter this number during the following process.

In the following example, we will associate a Request Management quote with a call report. The procedure is the same for associating other types of records.

To associate a quote with another record:

1 Access a Request Management quote.

2 Open the **Options** menu and highlight **Related|Calls**.

3 Click **Associate**.

4 A dialog box will is displayed, asking:

Associate Quote Qxxxx with which Call?

5 Type the ID number.

- For a call report, type the number in the form of CALL*xx*, where *xx* is the call number.
- For an incident, type the number in the form of IM*xx*, where *xx* is the incident number.
- For a change record, type the number in the form of *xx*. The change number does not have a defining letter.

6 Click **OK**. A confirmation message is displayed in the status bar.

Viewing Associated Records

You can view and edit associated Incident Management incident tickets, Service Management calls, and Change Management change tickets from a Request Management quote.

In the following example, we will view an incident ticket associated with a Request Management quote. The procedure is the same for viewing other types of records.

To view an associated record:

1 Access a Request Management quote.

2 Open the **Options** menu and highlight **Related|Incident**.

3 Click **View**. A list of related Incidents is displayed.

4 Double-click on an Incident to view the details. The ticket will open. You can edit the Incident ticket from here, including Resolving the ticket.

Viewing a Quote

To view an existing quote (*MAX.MANAGER* login):

1 Click **Request Management** on the main menu. Figure 1-11 shows the Request Management Menu for *MAX.MANAGER*.

Figure 1-11: Request Management Main Menu—MAX.MANAGER

CHAPTER 2 Security and Access

Security in the Request Management process is essential. Most operators will only need access to limited areas and items for requesting and ordering. In the same light, only certain operators should be allowed to approve requests and orders, mark shipments as received, and respond to operators requesting items. These subtle aspects of distinction are possible within Request Management.

This chapter addresses the various security access issues in Request Management, including:

Overview

Request Management uses several files containing records on individual operators to secure the database and provide efficient use of request functional areas (quotes, orders, and line items), including:

Note: If there is a conflict in the settings for a particular operator, the User Profile record settings override the environment settings in Request Management. Then the category and phase record settings for the functional areas override the User Profile record settings. Ultimately, those restrictions established in the category and phase definition records determine operator access privileges.

Capability Words

Every ServiceCenter operator has an operator record, which contains an array (list) of words defining the capability (access privileges) of the operator. In order for operators to access Request Management, those operators must have at least one of the following capability words defined in their operator records:

- OCMAdmin (Request Management Administrative access)
- OCML (Request Management Line-Item processing access)
- OCMO (Request Management Order processing access)
- OCMQ (Request Management Quote/Request processing access)
- SysAdmin (System Administrator access to everything)

To display capability words:

1. Select the Utilities tab from the system administrator ServiceCenter menu.
2. Click **Administration**.
3. Click **Capability Words** in the Security structure. A blank Capability File form (*capability*) is displayed.
4. Do one of the following:
   - Enter a Capability Word to pull up a Capability record.
   - Click **Search** to pass a *true* query without entering any values in the form.

Figure 2-1 shows a record list of all current Capability Word records.

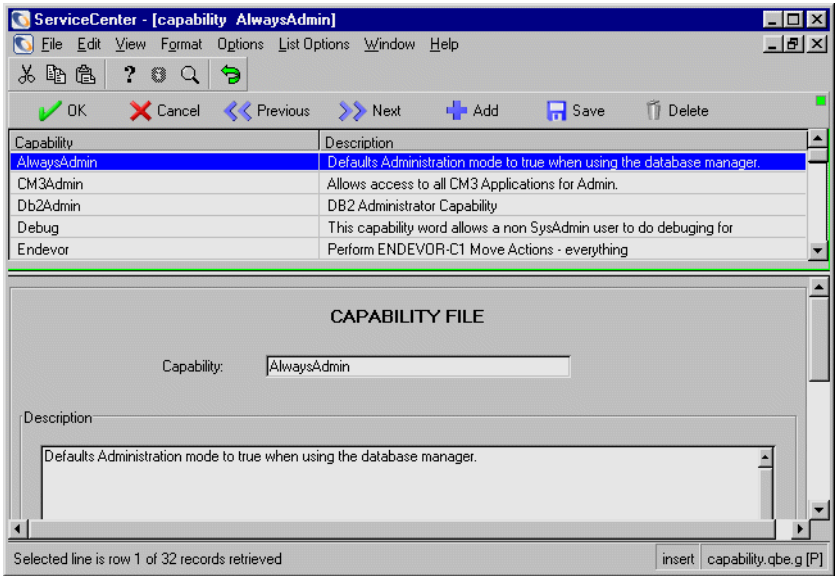

Figure 2-1: Displaying capability words

To add one of the required capability words to each operator who is to have access to Request Management in one way or another:

1. Select the Utilities tab from the system administrator ServiceCenter menu.
2. Click **Administration**.
3. Click **Operators** in the Security structure.
4. Do one of the following:
   - Select the login name of the operator to bring up the operator record.
   - If you do not know the login name, click **Search** to perform a *true* query without entering any values in the blank *operator* form. A record list with the requested login names is displayed. Make your selection by clicking on a login name.
5. Select the Startup tab from the Operator Record menu.

6 In the **Execute Capabilities** field, enter the appropriate capability word for Request Management access, as shown in Figure 2-2.

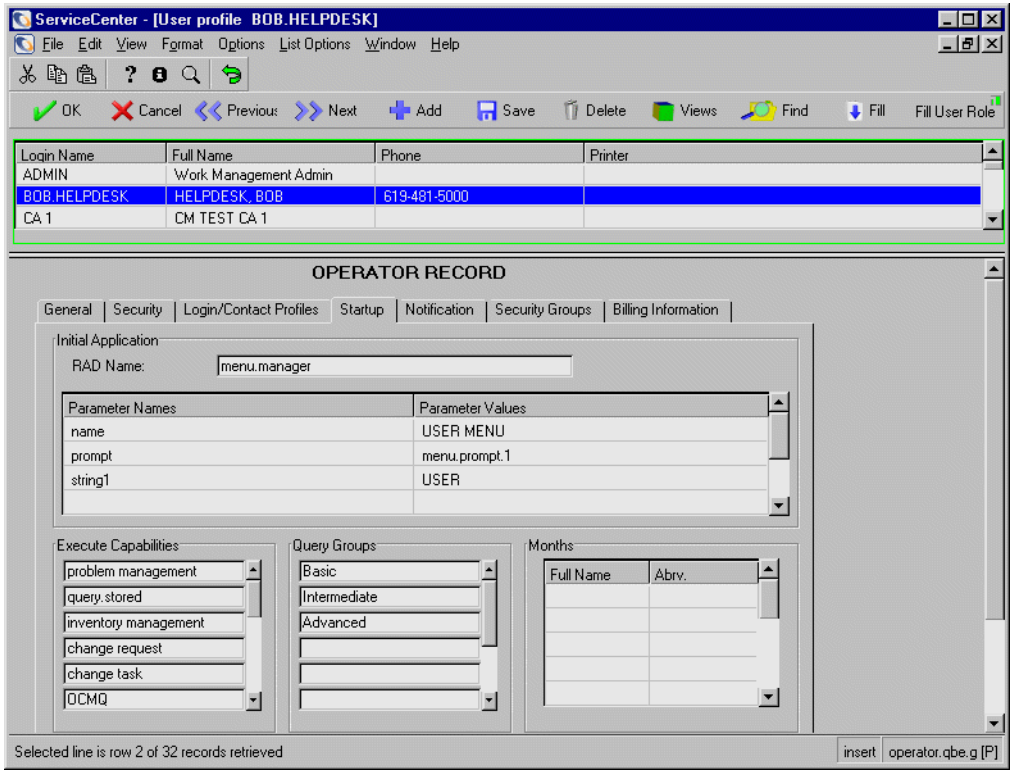

Figure 2-2: Modifying privileges through Capability Words

See the *ServiceCenter System Administrator's Guide* for details about capability words.

7 Click **Save** to record the changes.

Request Management Environment

Within Request Management, environment records define the overall operating environment for the area, and establish the various features within each functional area— quotes, line items, and orders. The environment records contain information specific to each operator, including access rights, numbering format and length, and enabled/disabled alerts and events. Environment records are required in order to access a particular functional area within Request Management.

Environment Access

Viewing Environment Records

To view the Quotes, Line Items, and Orders environment records:

1 Signed on as a system administrator, select **Request Management** from the system administrator's home menu.

2 Select **Environment** on the Quotes, Line Items, or Orders tab of the main Request Management menu. The environment record is displayed, *environment.ocmq*, *environment.ocml* and *environment.ocmo* respectively. These forms contain mostly the same fields, though different values may be entered for each, as they control separate functional areas.

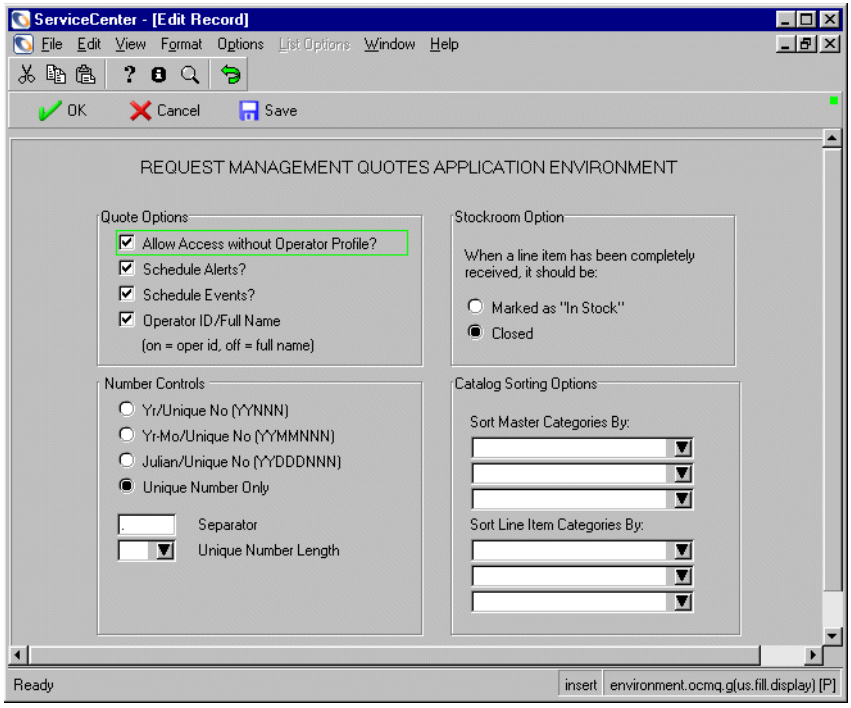

Figure 2-3: Line Item Environment Settings

Use the following definitions to determine the values for the form fields.

Quote Options Structure

These determine the overall behavior of quotes and how they will be processed.

Option	Description
Allow Access?	If *true*, operators without user profiles can access the area using the area's default profile.
Schedule Alerts?	Allows alerts to be turned on (*true*) or off (*false*) for the entire area, such as alerts added to the *current alerts* file, or not.
Schedule Events?	Allows event processing to be turned on (*true*) or off (*false*) for the entire area, such as events added to the *schedule* file, or not. Default is *false*.
Operator ID/Full Name	Controls if the Operator's Login ID or the Full Name is recorded in the application's records. If *true*, the Operator ID is recorded; if *false*, the Full Name is recorded. The default is false. This information is recorded in the variable *ocm.ufname*.

Number Controls Structure

Each of the first three options below retrieves the unique sequential number according to the ocmq, ocmo, and ocml records in the number file. The number.reset application can be used to reset this unique number at the beginning of each year, or more often if necessary. These number controls determine how your quotes will be numbered.

Option	Description
Yr/Unique No (YYNNN)	The current year (system-calculated), followed by a unique sequential number.
Yr-Mo/Unique No (YYMMNNN)	The current year and current month (system-calculated), followed by a unique sequential number.
Julian/Unique No (YYDDDNNN)	The current Julian date (system-calculated), followed by a unique sequential number.

Option	Description
Unique Number Only	A unique number without prefixes or suffixes, retrieved from the number file (ocmq, ocml or ocmo classes). ■ **Separator**—use a separator character between your main quote or order number and the included line items/parts, such as, *Q1234-001*. ■ **Unique Number Length**—set the length of the unique number to be added (this will determine how often you may need to reset your numbers).
Parent No/Unique No (PPPNNN)	The Parent Quote or Order number, followed by a sequential number determined by the **total.line.items** field in the parent item. This option is only displayed in the line item environment record (*environment.ocml*).

Stockroom Option Structure

When a line item has been completely received, it should be:

Option	Description
Marked as "In Stock"	Item should be marked as *In Stock*.
Closed	Item should be marked as *Closed*.

Editing Environment Records

Option	Description
Sort Master Categories By	When selecting items from the catalog, the master Line Item categories can be sorted on any field in the *ocmcatselect* database.
Sort Line Item Categories By	When selecting Line Item categories, sort by these fields in the *ocmlcat* database.

To edit any of the Request Management environment records:

1 Open **Request Management** from the main ServiceCenter menu.

2 Click **Environment** on the appropriate tab (Quotes, Line Items, or Orders).

3 Use the field definitions described in *Viewing Environment Records* on page 33 to determine the exact restrictions or permissions you wish to enable for your operators.

4 Determine the numbering format to establish for quotes, line items, and orders.

5 Decide on a separator character between your main quote or order number and the included line items/parts, such as *Q1234-001 and O2345-100*.

6 Determine the length of the unique number to be added (this will determine how often you may need to reset your numbers).

7 Click **Save** to record the new environment record.

Number Reset Application

Resetting the number file at a particular point may be required due to heavy activity, auditing requirements, dates being used as part of the numbering convention, or several other scenarios. Number resetting is often performed on a monthly or annual basis, depending on your numbering scheme for that functional area.

The **number.reset** application can be used to force the number file to be reset at a particular time. The application resets the number record to zero (0).

Important: Quote and Order line item numbers are stored in the same file, *Line Items* file (*ocml*), distinguished by default with *Q* for quotes and *O* for orders. When resetting numbering, you need to take into account whether future records will conflict with current record numbers. The number must be a unique value, as defined in the database dictionary file for each of the *ocm* files.

A schedule record must be defined to run in any ServiceCenter background processor. This record should be set to execute the **number.reset** application.

To reset the number.reset application:

▶ Access the environment record, as described in *Environment Access* on page 33.

To reset the number controls:

▶ Refer to *Number Controls Structure* on page 34 for detailed information about the fields within the Number Controls structure.

User Profile

The user profile controls the Request Management function access for users. Users can have the assigned User Role's standard profile, or be assigned to a unique profile to establish user access.

Further specifications are achieved through a separate profile for each of the three functional areas of Request Management, or one profile can be used for access to all. If two profiles are built for an operator, such as one for the *Quote* area and another for *All areas*, the profile with the specific area option takes precedence and overrides the *All areas* profile.

Viewing a User Profile

1. Open **Request Management** from the main ServiceCenter menu.
2. Click **Supporting Files** on the Maintenance tab.
3. Click **Profiles** in the Support structure.

   A blank operator profile form (ocmprofile) is displayed.

4 Click **Search** to pass a *true* query without entering any values in the form. Figure 2-4 shows a record list of all current user profiles.

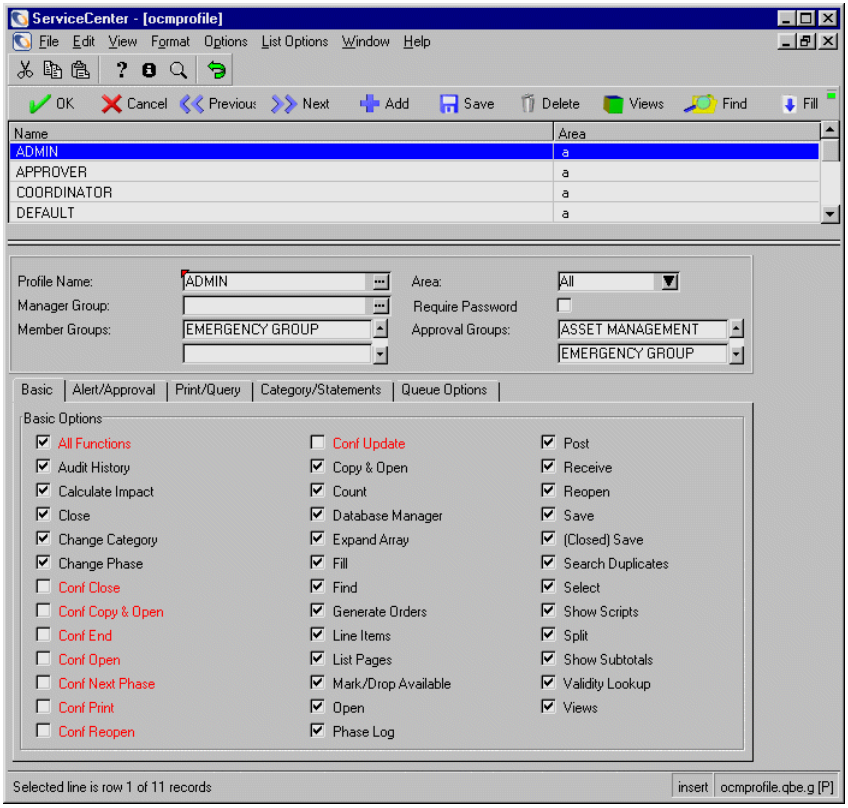

Figure 2-4: Operator Profile Record

A list of available user profiles appears above the data from the first record.

5 Select a profile to view from the list by clicking on the name. The selected record is displayed.

The profile form (*ocmprofile*) displays the specific access rights available to the user.

Profile Option	Description
Profile Name (*required*)	Identifies the operator login ID for which this profile applies.
Manager Group	Identifies the manager group to which this operator/group belongs. This information is provided for routing approvals for any records this operator/group opens.
Member Groups	Identifies which Request Management operator groups with which this operator/group belongs. These groups and their rights are explained in the following section.
Area	Identifies to which functional areas this profile applies, such as, *Quotes, Order, Line Items,* or *All*.
Require Password	States whether this operator must provide a password in order to access the given area of Request Management (*true=yes. false=no*).
Approval Groups	Identifies the Request Management Approval groups to which this operator/group belongs; for setting security and approval functions. Approval groups have control over the movement of items from one phase to another. For more information, see *Approvals* on page 123.

The tabs below the identification information include profile control options, which are specific to the operator or group. The default condition for the check boxes on these tabs for all operators is set to *unknown*, which equates to *false* for all operators except those with **SysAdmin** or **OCMAdmin** authority, then the default is *true*.

Note: On the tabs, red field items are confirmation controls and the other field items are display/Format Controls, which display in the **Options** menu or as buttons in the system tray.

If you need to make changes to the *ocmprofile.g* form profile controls and options, use Forms Designer. The "Input" properties (security field names) for the controls/options described in the tables below are included as well. See the *ServiceCenter System Tailoring Guide* to become familiar with using Forms Designer.

Basic tab profile options

This tab has general restrictions to functionality like Find, Fill, Open, Reopen, Save and View options. See the Basic tab shown in Figure 2-4 on page 38.

User Profile Controls and Options are stored in the *$G.ocmx.environment* variable (orders = *ocmq.quotes*, orders = *ocmo.orders*, lines = *ocml.lines*). Each option can be accessed by its **Security** field name, shown in the first column of the control/profile the following option tables.

For example: To access the controls/options for evaluating the condition when the system displays the standard SC confirmation open prompt, access the **cfrm.open security** field in the *$G.ocmq.environment* (*cfrm.open* in *$G.ocmq* environment).

See the following table for detailed descriptions of the Profile controls and options.

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
All Functions (*all*)	Sets all OCM function conditions to ***true***.	
Audit History (*audit*)	Controls access to the Audit History database. If auditing is not used in your OCM system, this option should be set to ***false***.	Displayed while viewing Quotes/Orders/Line Items.
Calculate Impact (*calcrsk*)	Accesses standard Validity Tables and calculates the Risk for the current record. This calculation is based on the same logic used in CM3 to determine Risk.	Available while viewing a Quote/Order/Line Item.
Close (*close*)	Closes the currently displayed record by updating the status of the **open** field to ***false***, executes the ***close.script*** (as per the Phase or Category definition), and closes the record.	Displayed while viewing Quotes/Orders/Line Items. *close*, Locked, Phase Close Cond=true, open~=false
Change Category (*new.category*)	Opens a new category.	

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Change Phase (*new.phase*)	Opens a new phase.	
Conf Close (*cfrm.closed*)	When the condition evaluates to true, the system displays the standard SC confirmation prompt when the operator selects the close option.	After initiating the close option.
Conf Copy & Open (*cfrm.copy*)	This condition is evaluated after the operator starts the copy&open process. If it evaluates to true, the system displays the standard SC confirmation prompt to confirm the copy&open action.	After initiating the copy&open option.
Conf End (*cfrm.end*)	When the condition evaluates to true, the system displays the standard SC confirmation prompt when the operator selects the end option.	After initiating the end option.
Conf Open (*cfrm.open*)	When the condition evaluates to *true*, the system displays the standard SC confirmation prompt when the operator selects the open option.	After starting the Open process.
Conf Next Phase (*cfrm.nextphase*)	When the condition evaluates to *true*, the system displays the standard SC confirmation prompt when the second or higher Phase of an item is started.	After starting the next Phase of a Quote/Order.
Conf Print (*cfrm.print*)	When the condition evaluates to *true*, the system displays a confirmation prompt when the operator attempts to print the currently open record.	After initiating a print operation on the current record.
Conf Reopen (*cfrm.reopen*)	When the condition evaluates to *true,* the system displays a confirmation prompt when the operator selects the reopen option	After initiating the reopen process.

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Conf Update (*cfrm.update*)	When the condition evaluates to true, the system displays the standard SC confirmation prompt when the operator selects the update option.	After initiating the update process.
Copy & Open (*cpyopn*)	Copies the data from the currently displayed record to a new record and attempts to open it. Note that the data from the currently displayed record must meet all standard Format Control and Validity Table processing for the open process. The Alerts and Approvals from the currently displayed record are not copied. New Alerts and Approvals are built for the new record.	While viewing records.
Count (*count*)	Counts the number of records in the current qbe list	While viewing a qbe list.
Database Manager (*database*)	Allows access to the native Database Manager prompt. From this point, the operator can access any ServiceCenter file (assuming access is granted by ServiceCenter security).	Displayed while viewing a Quote/Order/Line Item.
Expand Array (*expand*)	Expands the current array by executing the standard edit.array application	Available on all standard OCM RIO panels.
Fill (*fill*)	Executes standard ServiceCenter fill processing.	Available on most OCM RIO panels. While viewing records: *fill*, locked, evaluate (update) (the operator must have update authority). All other times: fill
Find (*find*)	Executes standard ServiceCenter find processing.	Available on most OCM RIO panels.

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Generate Orders (*generate.order*)	Overrides the standard Order Generation Process and immediately opens an Order for all Line Items of a Quote.	Available only while viewing Quotes. *generate.order*, locked, Phase Generate Order Cond=true
Line Items (*access.li*)	Finds all Line Items associated with the currently displayed Quote/Order. If no Line Items are found, the Line Item open process is automatically invoked.	Available while viewing a Quote/Order.
List Pages (*pagelist*)	List all the pages associated with this quote.	
Mark/Drop Available (*avail.to.order*)	This option controls two functions that toggle between each other based on the status of the avail.to.order field. mark avail: Allows the operator to manually mark the first level of associated Line Items as being available for Ordering. This starts the Order generation process for a Quote's Line Items. drop avail: Sets the avail.to.order flag to false. In other words, the Quote Line Item is no longer available for Order processing	Displayed while viewing a Quote Line Item. mark avail:*avail.to.order, null(parent.line.item in $L.file) (the Line Item is not consolidated with other Line Items), avail.to.order =false (the current Line Item is not marked for Ordering)* drop avail: *avail.to.order=true (the current Line Item is marked ready for Ordering)*
Open (*open*)	Takes the data entered by the Operator, executes the appropriate Scripts (defined in the Phase or Category records) and adds it to the appropriate database with a status of open (the open field is set to true).	open: Available on the initial query screen. open open new: Available while viewing an existing Line Item. *open*, ACTION="receive" (the receiving action is not currently active), Phase Add Line Item Cond (of the Parent Quote)=true

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Phase Log (*phase.log*)	Accesses the *ocmphaselog* records for the current Quote/Order via standard Database Manager	Available while viewing a Quote/Order. *phase.log*, locked
Post (*post*)	Takes the quantities displayed and posts them to the indicated Quote Line Items.	Displayed during the receiving process
Receive (*receive*)	Begins the receiving process for the currently displayed Line Item. This option is available for Line Items only.	Available while viewing Orders and Line Items. For Orders: receive, locked For Line Items: receive, parent locked, not null(parent.order in $L.file) (the Line Item is subordinate to an Order)
Reopen (*reopen*)	Executes the Reopen Script (defined in the Phase or Category record) and updates the record to a status of open (i.e., the open field is true).	Available while viewing a closed record. *reopen*, locked, open=false, Phase Reopen Cond=true
Save (*update*)	Grants update authority to records.	*update*, locked, open=false, Phase Update Cond=true
(Closed) Save	Grants update authority to closed records.	Available while viewing closed records.
Search Duplicates (*duplicates*)	Searches for duplicate orders.	
Select (*select.components*)	Begins the process of selecting a Part for a Line Item where part selection was deferred by the operator when it was selected from the Catalog.	Available while viewing a Line Item whose part selection was deferred. *select.components*, locked, evaluate(defer.selection in $L.file) (part selection was previously deferred)

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Show Scripts (*scripts*)	Opens a window showing all Scripts that may be executed from the currently displayed record.	Available while viewing a record. *scripts*, locked
Split (*split*)	Begins the process of splitting the current Line Item.	Available while viewing a Line Item. *split*, locked
Show Subtotals (*subtotal*)	Invokes the Subtotal process that is associated with the file of the current area	Available while viewing a record. *subtotal*, locked, open=true or unknown
Validity Lookup (*valid.lkup*)	Allows access to standard Validity Table Look-up processing.	While viewing a record.
Views (*views*)	Allows the operator to select an alternate format for viewing the currently displayed record of QBE format. After the new format is selected, its display Format Control is executed (this does not apply to QBE formats)	While viewing a record or a QBE list of records. views (while viewing a record) views and lng(denull(qbeformats in ocmxfcm))>0 (there is at least one QBE format defined in the master Format Control record)

Alert/Approval tab profile options

Determine this operator/group's rights for manipulating alerts and issuing approvals of different items.

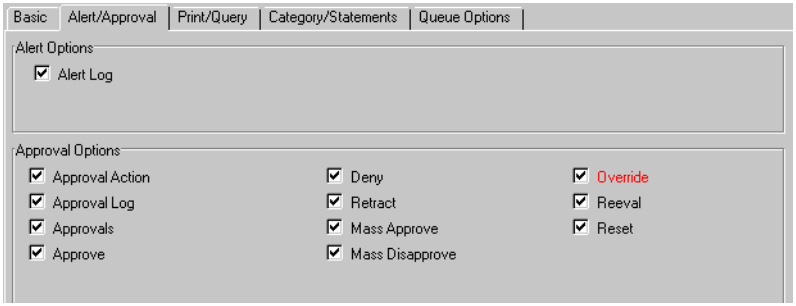

Figure 2-5: User Profile - Alert/Approval tab

Control/Option (*Security Field Name*)	Description	When Available Availability Condition
Alert Options		
Add (*alert.add*)	Controls the standard database manager add option when the *current alerts log* is accessed from a Quote/Order.	During the process of finding the Alerts associated with the current record. Displayed when no records currently exist.
Alert Log (*alert.brw*)	Allows the operator to access the *current alerts log* while viewing a record. If the record is locked, you will have update authority against the log records. If the record is not locked you will not have update authority against the log records.	Displayed while viewing a Quote/Order/Line Item.
Approval Action (*appr.active*)	Displays the approval requirements currently pending the approval of the current operator.	Displayed while viewing a Quote/Order.

Control/Option (*Security Field Name*)	Description	When Available Availability Condition
Approval Log (*approve.brw*)	Displays all approval logs associated with the currently displayed record. If this option is selected while viewing a Quote/Order then the approval logs generated by both the Quote/Order and the associated Line Items are displayed. If this option is selected while viewing a Line Item, then only the approval logs generated by the Line Item are displayed	Displayed while viewing a Quote/Order/Line Item.
Approvals (*approvals*)	Begins the process of finding all Quote/Orders that are currently pending the approval of the current operator.	Displayed on the Quote/Order initial query screen.
Approve (*approve*)	Updates the approval.status of the current approval log to approved.	Displayed when viewing one approval log record. *approve*, status="pending" or "future" or "approved", locked, Phase Approval Cond=true, gcond=true (The operator must have approval authority for the current group or must have override authority)
Deny (*deny*)	Updates the approval.status of the current ocmapprlog to denied.	Displayed when one approval log record is displayed. *deny*, (status="pending", "future" or "approved"), locked, Phase Approval Cond=true, gcond=true (the operator must have approval authority for the current group or must have override authority)

Control/Option (*Security Field Name*)	Description	When Available Availability Condition
Retract (*retract*)	Removes the previous approval or denial action taken against a given approval log and resets the status to pending. NOTE: This parameter also controls the retract all option. The retract all will retract all records in an approval requirements list.	Displayed when one approval log record is displayed. *deny*, (status="approved" or "denied"), locked, Phase Approval Cond=true, gcond=true (the operator must have approval authority for the current group or must have override authority).
Override (*approve.override*)	When this condition evaluates to true, the normal group restrictions that apply to the approval process (i.e., an operator must be a member of the group in order to approve, deny or retract for that group) are ignored.	While viewing an *ocmapprlog* record.

Print/Query tab profile options

Determine how background, foreground printing of the operator/group members can print and what query restrictions (such as partial key and advanced) apply.

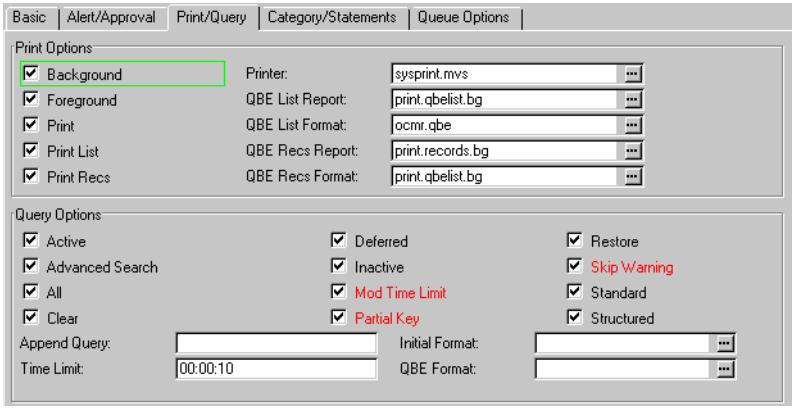

Figure 2-6: User Profile - Print/Query tab

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Print Options		
Background (*print.bg*)	Allows the operator to schedule print requests in the report background processor	After initiating the print option
Foreground (*print.fg*)	Allows the operator to execute print request in foreground (i.e., operator's terminal will be in a wait state until the report finishes).	After initiating the print option.
Print (*print*)	Allows the operator to begin the process of printing the currently displayed record.	Available on most RIO and FDISP panels.
Print List (*print.qbe*)	Prints the current QBE List of records in QBE format.	From a QBE list of records.
Print Recs (*qberecs*)	Prints the current QBE list of records in record format.	From a QBE list of records.

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Printer (*printer*)	An optional field that designates which printer that OCM generated print is routed to. This value is validated against the config file.	
QBE List Report (*qbelist.report*)	The report that is executed when you execute the *print list* option. The default is *print.qbelist.bg*	
QBE list Format (*qbelist.format*)	Defines format that is used when you select the *print list* option. The default is *ocmx.qbe* (where *x* is the area).	
QBE Recs Report (*qberecs.report*)	The report that is executed when you execute the *print recs* option. The default is *print.records.bg*	
QBE Recs Format (*qberecs.format*)	The format that is used when you select the *print recs* option. The default is *ocmx.default* (where *x* is the area).	
Query Options		
Active (*active.query*)	Allows the operator to query for all active records (i.e., open=true) that match the QBE data. This option is displayed on the pagelist confirmation screen. The <enter> key on the initial query screen causes the query to search for all active tickets. If the operator does not have the authority to query for active records, a message is issued after the operator selects the <enter> key.	During the process of querying for duplicate records. In GUI, the active query option is presented as a check box object.
Advanced Search (*query.window*)	Allows you to search by narrowing the time frame when a record was opened or updated. You also can enter the names of the operators who opened or updated the report.	

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
All (*all.query*)	Causes the query to search for all records, regardless of status.	Displayed on the initial query screen and when using the duplicate option. In GUI, the all query option is presented as a check box object.
Clear (*clear*)	Removes the previously entered QBE data and initializes the file variable (such as all of the data fields) to *NULL*.	For text, displayed on the secondary options of the initial query screen. In GUI, displayed in the Options pull-down.
Deferred (*deferred*)	Amends the query to search for deferred items (such as open=unknown).	Displayed on the initial query screen and after invoking the *duplicate* option and the *category* query option. In GUI, the deferred query option is presented as a check box object.
Inactive (*history*)	Allows the operator to query for all closed records (i.e., open=false) that match the QBE data. This option is displayed on the initial query screen and on the pagelist confirmation screen.	Displayed on the initial query screen and after invoking the duplicate function. In GUI, the inactive query option is presented as a check box object.
Modify Time Limit (*mod.time.limit*)	Allows the operator to modify the Time Limit from the detect keyed warning prompt.	
Partial Key (*partial.key*)	Allows the operator to execute partially-keyed queries.	
Restore (*qberestore*)	Restores the previously entered QBE data to the currently displayed record.	Available on the initial query screen. not null($lfilexsave)) (the clear option has been previously selected)

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Skip Warning (*skip.warning*)	Normally, it is desirable to warn a operator when they have entered an inefficient (partially or non-keyed) query. This option allows you to bypass this warning for certain operators. If the option is true the warning is bypassed.	
Standard (*standard*)	This option is displayed after the operator has initiated the query option. This option causes the query to be built according to normal ServiceCenter query rules.	Displayed after selecting the query option but before the query window is opened.
Structured (*structured*)	This option is displayed after the operator has initiated the query option. This option causes the query to be built according to OCM query rules.	Displayed after selecting the query option but before the query window is opened.
Append Query (*append.query*)	Defines the query string that is appended to all queries executed by the operator. OCM builds the query as: <standard query> and <append query>	
Time Limit (*query.time.limit*)	Defines the maximum amount of elapsed time that a query is allowed to execute.	
Initial Format (*initial.fmt*)	Defines the format name that is displayed to a operator when they first enter a given application. The default is ocmx.hdr1.	
QBE Format (*qbe.format*)	Defines the QBE format used to display records for a particular area	

Category/Statement tab profile options

Restrict the operator/group to certain categories and allow for additional statements to be processed in relation to these restrictions.

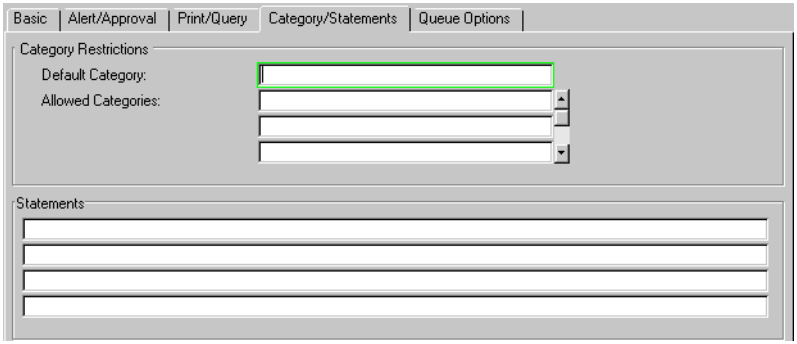

Figure 2-7: User Profile - Category/Statements tab

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Category Restrictions		
Default Category (*default.category*)	Defines the name of the Category that records are opened under when an operator opens a record for a particular area. If this field is *NULL* when an operator opens a record, then the operator can access only the Categories defined in the Allowed Cats field. This field is also used by the background order processor when generating orders. Refer to the section on Generating Orders.	

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Allowed Categories (*allowed.cats*)	Defines the categories the operator is allowed to access. This controls which Categories are presented for the operator to select from during record open (if a Dflt Category is not defined) and controls which records the operator can view. If an operator attempts to select a record from a QBE list that is not one of these Categories, access is denied and the appropriate error message is sent. If no Categories are defined, the operator will have access to all Categories for that area.	
Statements (*statements*)	An optional array of processing statements that are executed when the security variables are established. This allows you to manipulate the default security variables and/or establish special security variables of your own. TIP: You can add your own fields to the profile record and then establish global variables via these processing statements. Use the *ocmprofile.g* file variable to refer to fields in the current OCM Profile record.	

Queue Options tab profile options

Define whether the operator/group has a unique inbox in the various Request Management queues and allow for the specification of a unique queue format to display relevant quote or order records.

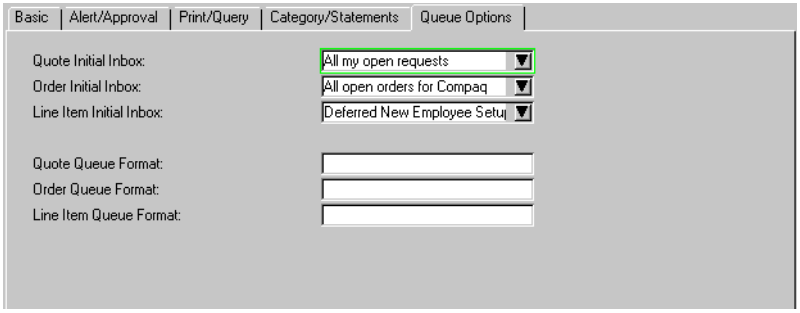

Figure 2-8: User Profile - Queue Options tab

Control/Option (*Security Field Name*)	Description	When Available Availability Conditions
Quote Initial Inbox (*quote.initial.inbox*)	Defines the default inbox for the operator opening the quote queue.	
Order Initial Inbox (*order.initial.inbox*)	Defines the default inbox for the operator opening the order queue.	
Line Item Initial Inbox (*line.initial.inbox*)	Defines the default inbox for the operator opening the line item queue.	
Quote Queue Format (*quote.manage.format*)	Defines the default queue format for the operator opening the quote queue.	
Order Queue Format (*order.manage.format*)	Defines the default queue format for the operator opening the order queue.	
Line Item Queue Format (*line.manage.format*)	Defines the default queue format for the operator opening the line item queue.	

Adding a Profile

1 Open **Request Management** in the main ServiceCenter menu.

2 Click **Supporting Files** on the Maintenance tab.

3 Click **Profiles** under the Support structure. A blank operator profile form (*ocmprofile*) appears. See a sample *ocmprofile* form in Figure 2-4 on page 38.

4 Do one of the following:

- Begin entering the appropriate values for your user profile, based on the field and tab definitions above.
- Click **Search** from the system tray to pass a *true* query without entering any values in the form. A record list of existing profile records will display.

a Choose a profile you would like to base your new profile on, and open it by clicking the name.

b Enter a new profile name.

c Begin additional modifications to the record to create your new operator/group profile.

5 When you have completed setting up the values for this profile, click **Add** to add it to the ocmprofile file.

Important: *Do not* press SAVE, as this will copy over the record you changed with the new data and remove the old record from the ocmprofile file.

6 A series of screens prompt you with the values you have provided to the check boxes and tab fields in the expanded form, which displays *true* and *false* values. Do one of the following:

- Move through these screens by clicking **OK** as you verify the values are correct for the access rights you intend this user to have.
- When you have completed setting up the values for this profile, select **Options** > **Rebuild Groups** to apply this and other operator profile record group updates to the appropriate group definition records.

When the record is added or updated, a message the following message is displayed in the status bar:

**All Group Records updated to reflect latest Profile definition.*

Editing a Profile

1. Open an existing profile. See *Adding a Profile* on page 56 for information about searching for and opening an existing profile.
2. Review the restrictions for that profile.
3. Use the field and tab definitions described in *Viewing a User Profile* on page 37 to determine the exact restrictions or permissions you wish to enable for the user.
4. Do one of the following:
   - Click **Save** in the system tray to confirm and record your revisions to the record.
   - When you have completed setting up the values for this profile, pull down the **Options** and select **Rebuild Groups** to apply this and other operator profile record Message group definition updates to the appropriate Message group definition records.

Group Records

A group in Request Management represents a collection of operators who share a common set of responsibilities. Group definitions specify two divisions within the group: operators who are members (reviewers), and operators who have approval authority and receive approval information associated with this group (may be the same as the members).

One of the primary purposes of this grouping is for dissemination of system messages to relevant parties. Member groups (reviewers) or Approval groups may be listed in the ocmevents record, but if these groups are not also listed in the Group record, they will not receive messages. The individuals of a group will have the same authority as identified in their profile, but they simply will not receive messages.

An operator's authority depends on the operator profile; whether an operator receives messages depends on membership in the group record.

Viewing Group Records

1. Open **Request Management** from the main ServiceCenter menu.
2. Click **Supporting Files** on the Maintenance tab.
3. Click **Groups** in the Support structure.

A blank group definition form (*ocmgroups*) is displayed.

4 Click **Search** to pass a *true* query and retrieve all current user profiles.

A record list of available group definitions is displayed above the data from the first record.

5 Select a profile to view from the list by clicking on the name. Figure 2-9 shows the selected record.

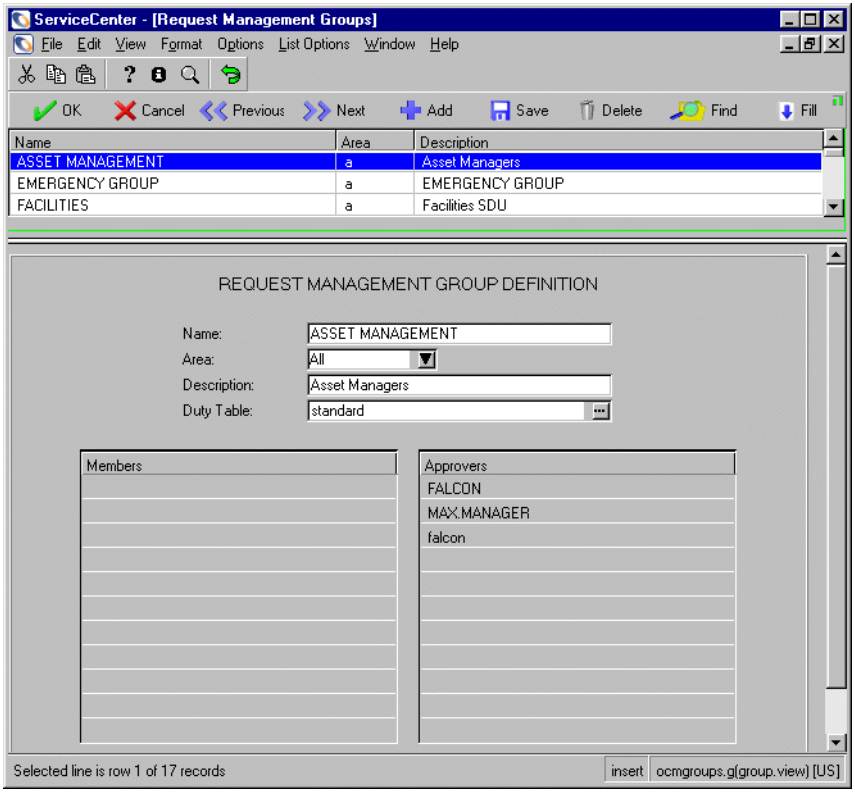

Figure 2-9: Group Definition

The definition form (*ocmgroups*) displays the specific operators who receive member messages and approval messages for this group.

Field	Description
Name (*required*)	Identifies the name of the group; usually reflects the name of the department. Must be unique within each Request Management area.
Area	The functional area for this group record. Valid values include Quotes, Orders, Line Items, and All.
Description	Description of the group.
Duty Table	Name of the Duty Table that defines the working hours of this group. Used by the Alert processor when scheduling alerts (for example, determines which shifts are valid for sending alerts to these operators).
Members	The login IDs of operators who are members (reviewers) of this group and who will receive messages when the **ocmevents** Member List field contains a value of *members* or *all*. Select Options > Rebuild Groups to update this Members list to include any profile record group additions or changes made in the profile record.
Approvers	The login IDs of operators who are approvers of this group and who will receive messages when the **ocmevents** Member List field contains *approver* or *all*. Select Options > Rebuild Groups to update this Approvers list to include any profile record group additions or changes made in the profile record.

Adding Group Records

1. Open **Request Management** from the main ServiceCenter menu.
2. Click **Supporting Files** on the Maintenance tab.
3. Click **Groups** under the Support structure. A blank group definition form (*ocmgroups*) appears, as shown in Figure 2-9 on page 58.
4. Do one of the following:
   - Begin entering the appropriate values for your group definition record, based on the field definitions described in *Viewing Group Records* on page 57.
   - Click **Search** to pass a *true* query and retrieve all current group definition records.

- Choose a group definition which you would like to base your new group on and open it by clicking the name.
- Enter a new group name.
- Begin additional modifications to the record to create your new group record.

5 Select **Options** > **Rebuild Groups** to update the Members and Approvers lists to include any profile record Message group additions or changes made in the profile record.

6 Click **Add** to confirm and record your new group record.

Editing Group Records

1 Open an existing record, as described in *Viewing Group Records* on page 57.

2 Review the membership and approval lists for that Message group definition.

Note: All membership additions or deletions are made through the operator profile record group changes. For more information on editing profile records, see *Editing a Profile* on page 57.

3 Select **Options** > **Rebuild Groups** to rebuild all group definition lists after the operator profile records have been updated.

3 Catalog Operations

CHAPTER

The catalog is the first step the operator encounters in the request process. Creating the catalog is one of the most important steps in the Request Management setup process. See *Pre-Implementation Planning* on page 211 for detailed explanations about what you will need to build your catalog.

This chapter addresses the following issues in relation to setting up and using the Request Management catalog.

Overview

Within the catalog are the list of items and bundled items available for request. These items and categories of items need to be set up by an administrator with rights to create catalog items. Most operators will only be allowed to access existing catalogs, and will not have editorial control in the process, such as not having the ability to add items to the catalog that are not already defined.

Primary Files

The catalog consists of the model, modelvendor and vendor files.

Model (*Catalog*) File

The model file (also known as the *catalog* file) contains a detailed bill of materials for a part. This includes the hardware, software and services that comprise the item, as well as controls on the part and its components. The file contains information regarding what operators can do with the part, how components of this part are selected, how quote line items turn into orders, and whether to order or to consume from stock. Both the model.g form and the ocmco.g form can be used to display data contained in the model file.

The catalog defines an item's components and their order generation dependencies. Controlling the order generation dependencies includes the purchase requisition and service and work orders necessary to obtain the item.

The following field controls the grouping of these items:

Type: Category is the primary grouping for Catalog items. Allows grouping of similar items under a common name.

Modelvendor File

The modelvendor file is a bridge between the model and vendor files. It contains relational information between a particular part or model, and the associated vendor(s) of that part. Data regarding cost, lead times, and payment schedules for a vendor are tracked along with the parts.

Vendor File

The vendor file is shared throughout ServiceCenter as the source of manufacturer and retail vendor information. It also holds data on internal and external service providers. A vendor record for a particular manufacturer must exist before items from this manufacturer can be admitted to ServiceCenter inventory and, consequently, the Request Management catalog.

Categories

Categories within Request Management help to group items that would normally be listed independently. Without these groupings, seeking out items and services when ordering would make the request process more time-consuming.

Request Categories

ServiceCenter has three out-of-box request categories from which you can choose to procure assets, order new employee items and services, and accomplish an employee office move. When you open a quote, you are presented with the following out-of-box Request category selections:

- Customer Procurement Requests
- Human Resources
- Employee Office Move Process

Once you select a Request category, you are presented with the master catalog categories.

Master Catalog Categories

Master catalog categories provide a 'bundled' approach to ordering from the catalog. This 'bundled' approach helps to group like or related bundled categories and line items. For example, labor can be logically grouped within more than one master category, whereas otherwise it might be overlooked, creating problems if it's ordered too late in the process.

Master categories and line items are those items displayed directly after the request categories. For example, when you choose request category *Customer Procurement Requests*, ServiceCenter displays the Master Catalog shown in Figure 3-1.

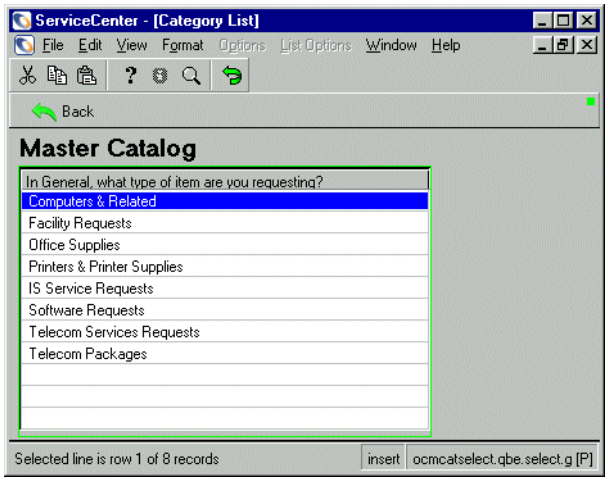

Figure 3-1: Master Categories in the Catalog

The master catalog categories are grouped, so that you can combine the necessary items and related services. For example, selecting **Computers & Related** serves to group the following item types and services: Computer Accessories, Desktop Computers, Handheld and PDAs, Hardware Requests, Request Hardware Upgrades, Installation Services, Individual Monitors, and Notebook Computers. So if you are ordering a computer monitor, you need to select **Individual Monitors**.

As an out-of-box example, the summary of New Employee Setup includes furniture, computer equipment, installation services, and so forth. You can add items to or take away from this bundled order, as needed.

Adding Master Categories

When you create a master category for the catalog, you begin a process which contains ever-increasing levels of specification. The general master category will be created in the following steps, but you will be adding other items (created later in this guide) into this category.

To create a master category:

1 Click **Request Management** in the ServiceCenter home menu.

2 Click **Administration** in the Maintenance tab.

3 Click **Master Category** in the Line Items tab. Figure 3-2 shows the *ocmcatselect* form.

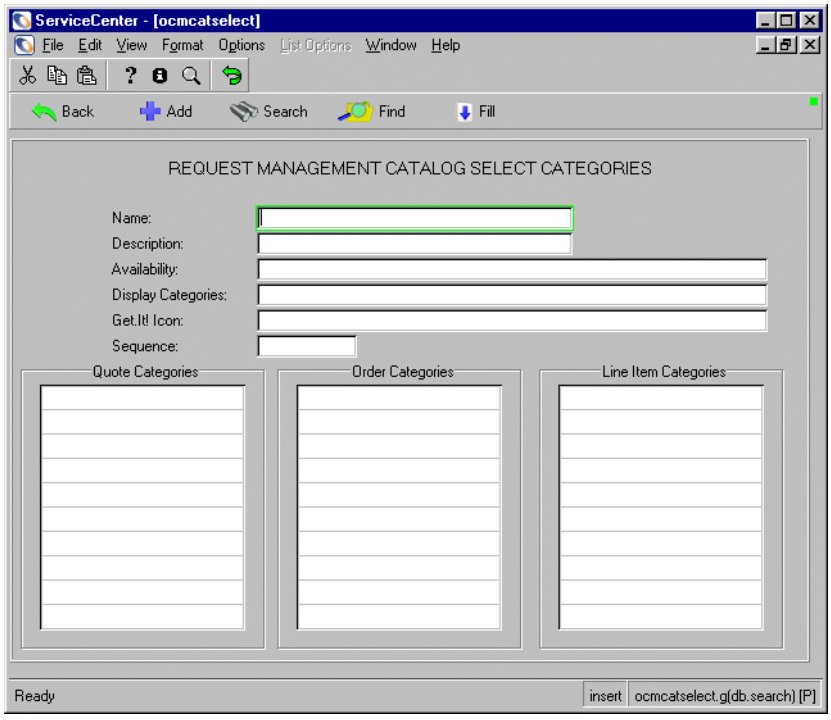

Figure 3-2: Configuring A New Master Category

4 Enter the *required* unique name for this master category in the **Name** field.

5 Enter a short description of this catalog item in the **Description** field (no more than 30 characters in length). This description is displayed on record lists and should be meaningful for operators.

6 The condition evaluated during adding a line item process to determine if the operator can select items under this master category. Decide whether you want operators to have the option of selecting this category while adding a line item. Enter *true* in the **Availability** field if the operator is to have this control; leave the field blank if the operator is not to have this option, as this control defaults to *false* if left blank; or use a condition to create a more variable availability control (see note below).

Note: The variable *$lo.ucapex* can be used to search for operator/group capability words and whether this master category will be available to particular operators. It can be used in the **Availability** field as part of a condition, such as:

```
index("Capability words",$lo.ucapex)>0
```

7 The condition evaluated after the operator selects the master category to determine if the list of line item categories under this master category is displayed. Decide whether you want operators who select this category to have the option to see which line items of the category will be included in the quote. Enter *true* in the **Display Categories** field if the operator is to have this option; leave the field blank if the operator is not to have this option, as this control defaults to *false* if left blank. If *false*, the line item category record list is not displayed; instead, all parts (or line items) with a line item category matching any of this master category's line item categories is displayed.

8 If you are using Get.Resources! with ServiceCenter, you can modify which icon will be used in the **Get.It! Icon** field. Search your browser and enter the path. For example:

```
icons/cataccessories.gif
```

9 Determine the sequence to sort the list of parts for this category.

Note: You can modify the sort order within the **Sequence** field by selecting the *category* key in the *model* file.

10 Determine which **Quote Categories** (request quotes -- types of requests) will access this master category and display this line item in the catalog. If left blank (*NULL*), this category will be available for all request quote categories. In the default system, there are three Request Management quote categories. (You can return to the record later to add additional Quote categories, if you do not know the names of the categories at this time.)

To display a list of available quote categories:

a Place the cursor in the first field of the array and click **Find**.

b Choose a category from the displayed list.

c Click on the category name to display the quote category record definitions.

d Make note of the category name, as you will have to enter the name later in the **Quote Categories** field (array).

e Once you have selected the appropriate request category where this new master category quote will belong. Click **OK** then **Back** to return to the master category form.

11 Enter the name of this category in the **Quote Categories** field (array).

12 Determine which **Order Categories** will access this master category and display this line item in the catalog. If left blank (*NULL*), this category will be available for all operator order categories. Currently there are five default order categories. (You can return to the record later to add additional Order categories, if you do not know the names of the categories at this time.)

To display a list of available order categories

a Place the cursor in the first field of the array (**Order Category Name** field), and click **Find** in the system tray.

b Choose an order category from the displayed list.

c Click on the category name to show the order category definitions.

d Make note of the category name, as you will have to enter the name later in the **Order Categories** field (array).

e Once you have selected the appropriate order category, click **OK** then **Back** to return to the master category form.

13 Add the name of this category to the **Order Categories** array.

14 Determine which line item categories are to be available in this master category. These are the smaller groupings of products and services which organize the available pool of resources. Currently there are just over 80 default line item categories. If you leave this field blank, all the line item categories will be available to this master category.

To display a list of available line item categories:

a Place the cursor in the first field of the array, and click **Find** in the system tray.

b Choose a line item category from the displayed list.

c Click on the category name to show the line item category definitions (must be defined in the *ocmlat* file).

d Make note of the line item category name, as you will have to enter the name later in the **Line Item Categories** field (array).

e Click **OK** then **Back** to return to the master category form.

15 Add the name of this category to the **Line Item Categories** array.

16 Click **Add** to record the new master category.

Once added, you will receive the following message in the status bar:

ocmcatselect record added

Viewing Master Categories

To view a master category:

1 Click **Request Management** in the ServiceCenter home menu.

2 Click **Administration** on the Maintenance tab.

3 Click **Master Category** on the Line items tab. A blank master category record form (**ocmcatselect**) appears, as shown in Figure 3-2 on page 65.

4 Pass a *true* query by clicking **Search**, or enter a value in the form and press **Enter** to call a specific master category record.

5 A record list displays, along with the details of the first record. Double-click another master category record to select it from the list. The selected master category record appears. The field definitions on the **ocmcatselect** form are defined in *Adding Master Categories* on page 64.

Line Item Categories

Line item categories are the smaller and more numerous catalog item categories. Line item categories are the building blocks of the master categories; however, they are still categories, built of smaller pieces: parts. The smaller pieces in this case are individual line items, such as, an ACME mouse or an ABC 17" monitor. The two items in the example could be found in a line item category called *Computers & Related* along with many other individual line items associated with a computer setup procedure.

Line item categories can be restricted to certain quote and order groups just as can the master categories. Based on the line item categories named as available in the master category selected on the first page of the catalog, the line item categories are displayed in subsequent pages of the catalog.

Selecting a line item category from the catalog presents a list of actual line items, or parts, available for that category.

Adding Line Item Categories

The line item category is the next step down in specification from the master category. Line items are more numerous and specific to the individual groups of products a company holds in inventory than are the master categories. Line items include both specific parts and services.

To add a line item category:

1 Click **Request Management** in the ServiceCenter home menu.

2 Click **Administration** on the Maintenance tab.

3 Click **Create Category** on the Line Items tab. Figure 3-3 shows the *ocmlcat* form.

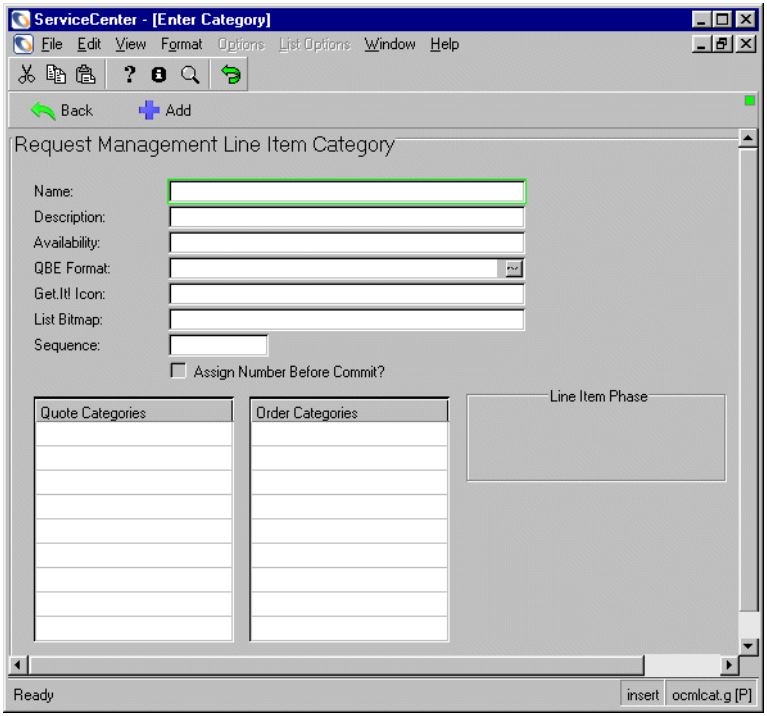

Figure 3-3: Adding line item categories

4 Most of the *ocmlcat* form fields shown in Figure 3-3 have already been explained. For more information, see *Adding Master Categories* on page 64. See the rest of the steps in this sequence for the other field explanations.

5 Enter the **QBE Format**, if you will be using a different format other than the default *ocml.qbe* form.

6 Decide whether or not you want to check the **Assign Number Before Commit?** field box before adding this category line item. If checked (*true*), the system assigns a number to the line item before displaying a confirmation screen (if that display option is activated). If left blank (*NULL*), defaults to *false*.

7 Bitmaps can be stored in the ServiceCenter repository and displayed on any of the GUI client platforms. For example, pictures of inventory items can be stored. The **List Bitmap** field lets you add a bitmap that can be displayed on your ServiceCenter form by simply adding a holder for the bitmap on the form.

8 Enter the (*required*) name of the phase for this category in the **Line Item Phase** field. This name will automatically be defaulted through Format Control to match the category name.

9 Click **Add** to save the new line item category.

Important: This item will not function properly until a phase definition record of the same name has been committed to the database. See *Adding Phases* on page 76 for details on adding a phase record.

When the new line item category is saved, the Line Item Category record is added, and then you are prompted for values to add an associated phase definition record, as shown in Figure 3-7 on page 77. See *Adding Phases* on page 76 to complete this task.

Viewing Line Item Categories

To view a line item category:

1 Click **Request Management** in the ServiceCenter home menu.

2 Click **Categories** on the Line Items tab. A blank Line Items Category form (*ocmlcat*) appears, as shown in Figure 3-3 on page 69.

3 Pass a *true* query by clicking **Search** without entering any values in the blank form, or enter a value in the form and press **Enter** to call a specific line item category record.

Figure 3-4 shows a list along with the first item in the list ().

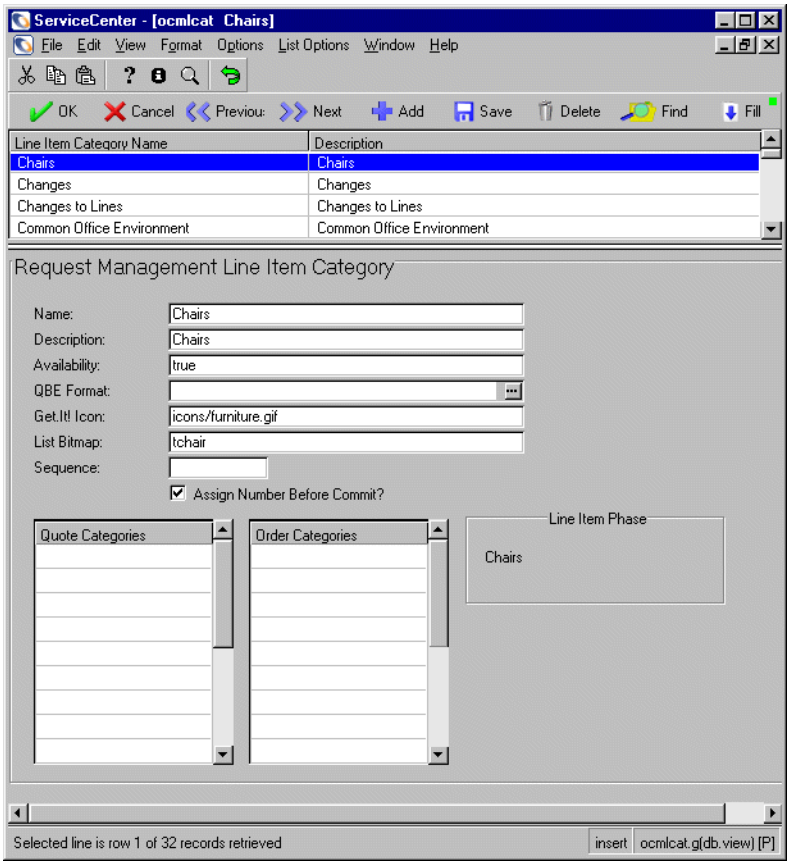

Figure 3-4: Line Item Category Definition

4 Select other category records, as needed.

5 Most of the *ocmlcat* form fields shown in Figure 3-4 are described in *Adding Master Categories* on page 64. See the rest of the steps in this sequence for the other field explanations.

6 Enter the **QBE Format**, if you are using a different format other than the default *ocml.qbe* form.

7 Decide whether or not you want to check the **Assign Number Before Commit?** field box before adding this category line item. If checked (*true*), the system assigns a number to the line item before, displaying a confirmation screen (if that display option is activated). If left blank (*NULL*), defaults to *false*.

8 Bitmaps can be stored in the ServiceCenter repository and displayed on any of the GUI client platforms. For example, pictures of inventory items can be stored. The **List Bitmap** field lets you add a bitmap that can be displayed on your ServiceCenter form by simply adding a holder for the bitmap on the form.

9 Enter the (*required*) name of the phase for this category in the **Line Item Phase** field. This name will automatically be defaulted through Format Control to match the category name.

10 Click **Add** to save the new line item category.

Note: Users may want to establish multiple line item categories that use the same phase name (especially if the categories will all be using the same options and formats established in the Phase definition). For more information, see *Phases* on page 75.

Phantom Line Items

Phantoms are place holders, or pseudo parts, used to organize a collection of multiple items. They are used to provide flexibility in defining component relationships within the catalog, and are usually not physical items. A phantom can be considered an *umbrella* type of level for several parts selections of the same type. An example of a phantom line item is the *New Accounts & Access* line item. Beneath the *New Employee Setup* master category, the *New Accounts & Access* line item provides a selectable option. This item itself does not display on the quote or order when it is selected, but each of the associated parts below are displayed as individual line items, such as internet access, email account, and network ID.

The phantom part is a parent of the specific items within it, so that the specific items (or parts) are selected through the phantom part.

Phantoms are assigned part numbers, but they themselves usually are not ordered or placed on a quote.

There are two ways to designate a listing as a phantom:

To select Phantom in the Reorder Type field in the Reorder Information tab on the model **form:**

1 Click **Request Management** on the Services tab of the ServiceCenter home menu.

2 Click **Supporting Files** on the Maintenance tab of the Request Management home menu.

3 Click **Model** on the Catalog tab.

4 Do one of the following:

- Select **Phantom** in the **Reorder Type** field in the Reorder Information tab on the *model* form, as shown in Figure 3-5.

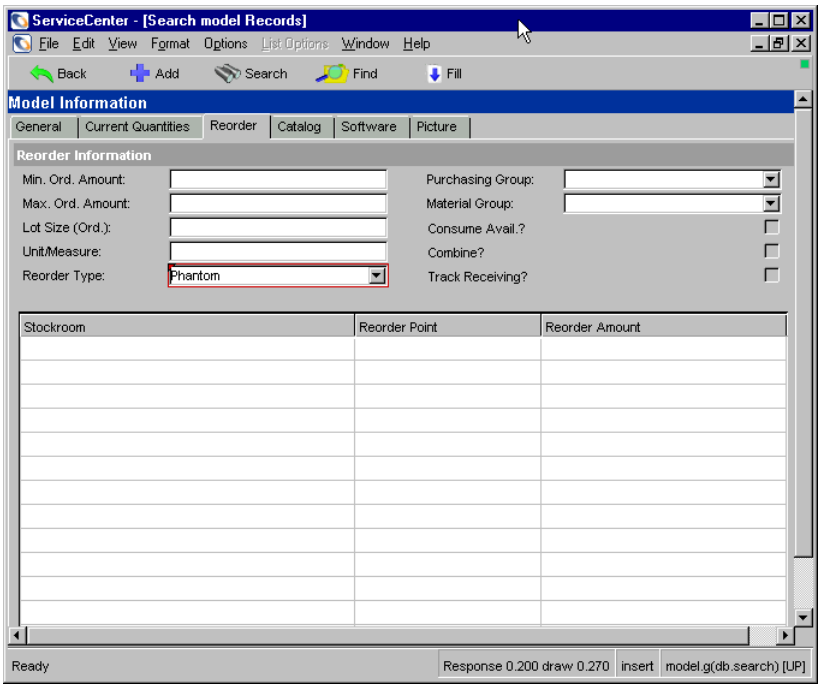

Figure 3-5: Select Reorder Type to designate a listing as a phantom

- Create a line item category of *phantom* (see *Adding Line Item Categories* on page 69).

There are three types of line items, as shown in *Line Item Types* on page 74.

- Type 1 represents the Catalog Part (part or service) that is actually ordered.
- Types 2 and 3 represent two kinds of *phantoms*. Type 2 is an intermediary *invisible* part:
  - Used to group several related parts without all the parts displaying on a list, controlling the size of the *pick list*.

- Its line item category is usually *phantom.*
- Is itself not added to the quote.
- Used for the selection of its children parts.

Type 3 is a high-level part:

- Its line item category is a *phantom*, but with a specific category.
- Used to select high-level items that may or may not be added to the quote.

Line Item Types

Type	Model/Vendor?	Line Item Category	Copy to Line Item?	Description	Parent/ Child?
1	Yes	Category Specific	Yes	Represents a part or service	Optional children
2	N/A	Phantom	No	Used to group types 1, 2, or 3	Always has children
3	N/A	Category Specific	No	A phantom (2) with a specific category, so that it can be selected from the Master Category. Used to group types 1, 2 and 3.	Always has children

Figure 3-6 shows an example of a Type 2 line item category, category-specific phantom with its model record (*ocmco*).

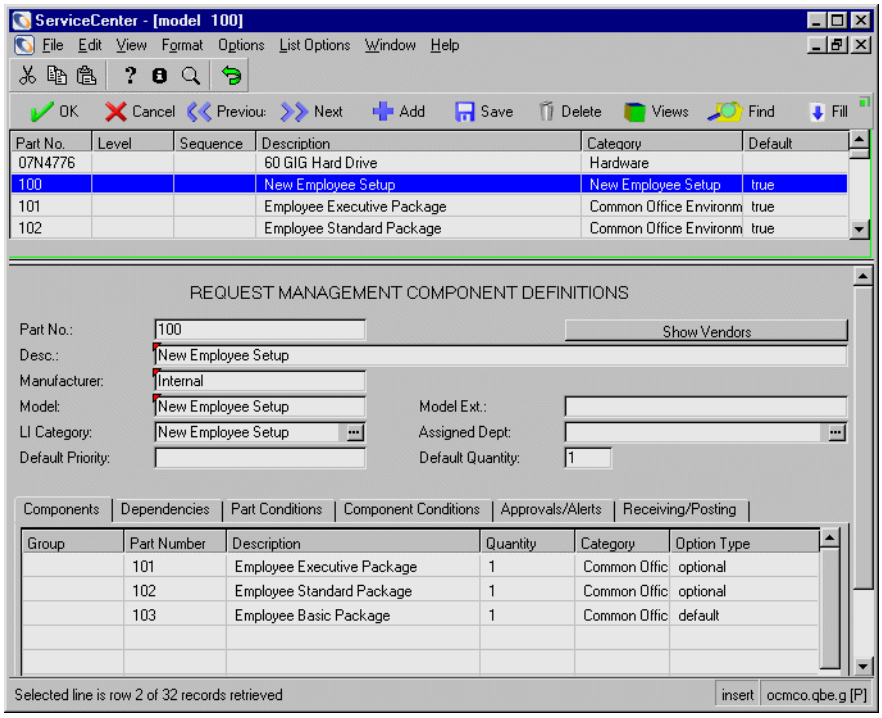

Figure 3-6: Phantom Line Item Definition

This part (100) has three components (children) of the *New Employee Setup* master category. Its category is *phantom*. Each item, which is to be added as a line item when this phantom item is selected, will be a child of the *New Accounts & Access* master category.

Phases

Phases determine when and how quotes, line items, and orders, are processed. Phases control the activity allowed during that administrative step in the business process flow.

With a quote category, a phase indicates where in the process the quote currently stands, and who can modify the quote. A typical implementation has one quote category with two to three phases, such as **initial** phase- for setting up the quote with approvals, **ordering** phase- for order generation,

and **QA** phase- for verifying successful fulfillment. In the case where a phase exists for the operator who submitted the quote to verify his or her satisfaction, an **operator approval** phase could be set up, restricting the close or approval control of the quote to a request coordinator who must contact the originating operator to verify that the operator approves of the quote.

Not all operators have access to quotes and orders at all stages of the process. Typically, an implementation sets up one phase per order category, providing specific instruction for that category. Each line item category has only one phase, which defines the system behavior when that line is selected and processed.

Adding Phases

Quote Phases

To add a quote phase:

1. Open the Request Management menu on the ServiceCenter home menu.
2. Click **Quote Phases** on the Quotes tab.

   A blank phase definition form (*ocmoptions.q*) displays.
3. Pass a *true* query by selecting **Search** without providing any additional information in the form.

Figure 3-7 shows a list of existing quote phase definitions.

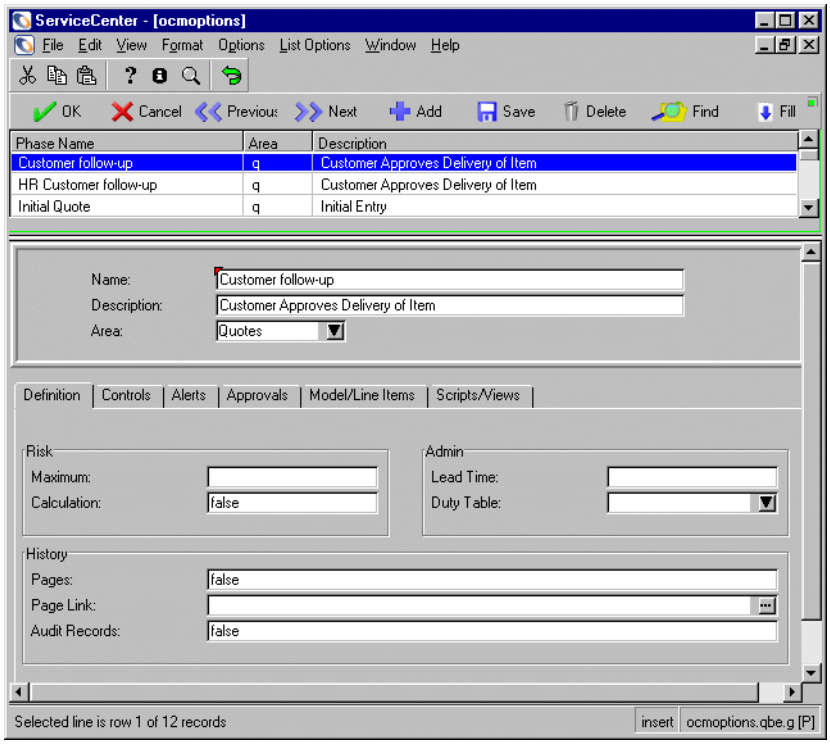

Figure 3-7: Quote Phase Definition

4 From this list, select a phase definition you wish to base your new phase on by clicking the phase name. The phase definition (*ocmoptions.q*) form appears, containing the definition data of the selected quote phase.

5 Modify the phase record with your information by providing necessary information on each of the seven tabs, relevant to the system behavior and level of control you want an operator to have on a quote in this phase. For example.

The tabs and the fields within these tabs on the Phase Definition screen are described in *Quote Phase Definition Fields* on page 78.

6 Click **Add** to save and add the new phase to the system.

7 Do one of the following:

- When prompted (status bar at the bottom of the window displays a message that states: *Ready*), click **Add To All**, shown in Figure 3-8 on page 78, to select all events for this new phase definition.

- If you want to restrict the phase to only some events, select them at this time and *do not* click Add To All. Instead, click **Back** to include only these events and return to the Request Management menu.

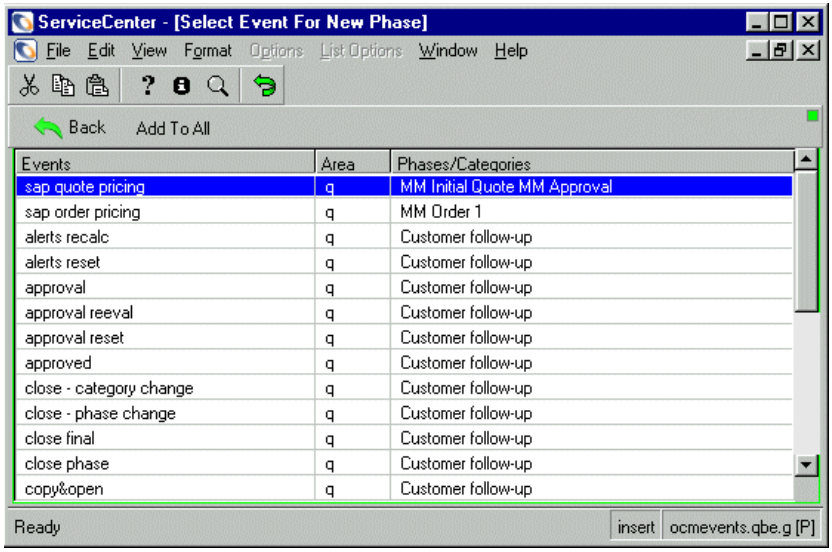

Figure 3-8: Selecting an event for a new phase

Quote Phase Definition Fields

Definition tab

The Definition tab shown in Figure 3-7 on page 77 lists the control options available to an operator to modify this line item.

Risk Area

Field	Description
Maximum	Defines the maximum value of risk that can be set from the risk calculation.
Calculation	*True* or *false* condition. *True* calculates the risk for the current record (calculation is based on the same logic used in CM3 for Change Management when determining the risk calculation). *False* does not perform a risk calculation.

Admin Area

Field	Description
Lead Time	The number of days advance notice required to deliver the product or service. Expressed as a date/time relative to current date/time and to Duty Table.
Duty Table	The name of the Calendar Duty Table that Lead Time is calculated against in order to arrive at a date. If *NULL*, the system calculates Lead Time against a 24/7 time table.

History Area

Field	Description
Pages	Allows (*true*) or disallows (*false*) listing all the pages associated with a quote.
Page Link	The link to be used to copy the fields from the current record to the *page* file. If there is no link specified, all fields will be moved.
Audit Records	Allows (*true*) or disallows (*false*) audit records to be added for the record whenever it is modified.

Controls tab

The Controls tab lists the options to be available for the operator to modify the quote by updating or approving it. Values here can be *true*, *false*, or a conditional statement. A conditional statement should use *$L.file* as the reference to the current record.

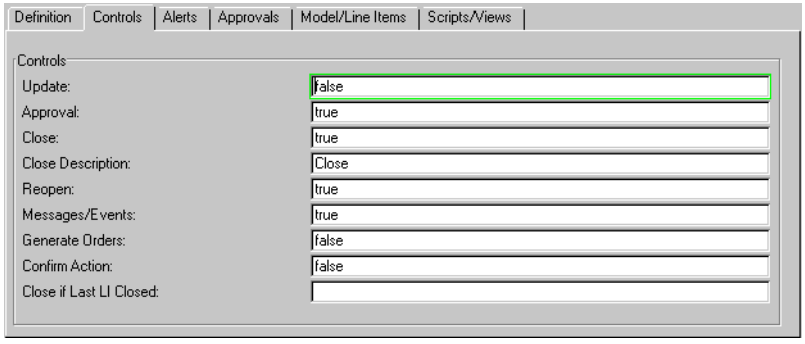

Figure 3-9: Controls tab

Controls Area

Field	Description
Update	Allows (*true*) or disallows (*false*) the operator to update a quote within this phase.
Approval	Allows (*true*) or disallows (*false*) the operator to approve a quote within this phase.
Close	Allows (*true*) or disallows (*false*) the operator to close a quote within this phase.
Close Description	The description of the option that is used to close the phase (such as, *Close* or *Next Phase*).
Reopen	Allows (*true*) or disallows (*false*) the operator to reopen a quote within this phase.
Messages/Events	Allows (*true*) or disallows (*false*) the system to send a message event within this phase.
Generate Orders	Allows (*true*) or disallows (*false*) orders to be generated within this phase.
Confirm Action	Allows (*true*) or disallows (*false*) confirmation on an action in a quote within this phase.
Close if Last LI Closed	Allows (*true*) or disallows (*false*) a quote to be automatically closed if the last line item is closed within this phase.

Alerts tab

The Alerts tab indicates which alerts are applicable for this line item.

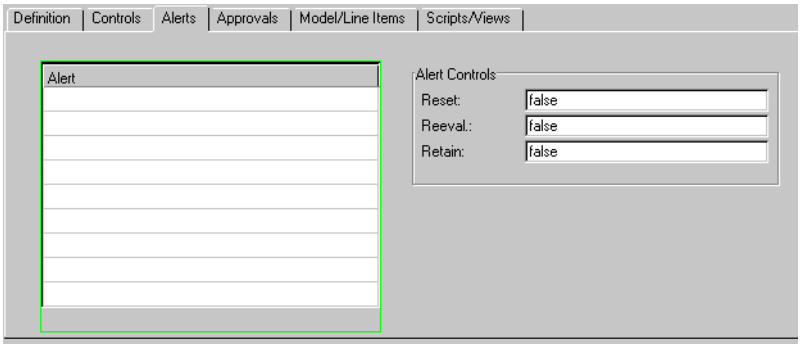

Figure 3-10: Alerts tab

Field	Description
Alert	Alerts on file. Put your cursor in this field and click *Find* to search a current list of alerts with their descriptions to find an applicable alert or click *Fill* to bring up the current list of alerts and double-click an alert to select it from the list.

Alert Controls Area

Field	Description
Reset	Resets all alerts and recalculates all possible alerts.
Reeval	Reevaluates the current active alerts to determine if they are still valid.
Retain	Retains current alerts when the phase changes.

Approvals tab

The Approvals tab lists those groups comprising approval requirements for this line item.

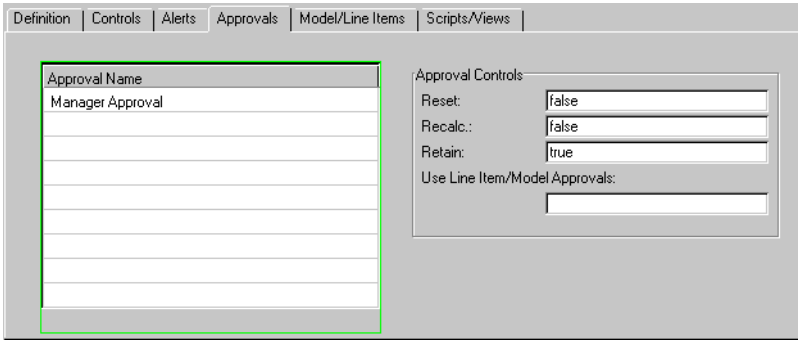

Figure 3-11: Approvals tab

Approval Name Approval Definitions on file. Click *Find* to search a current list of Approvals with their conditions and descriptions to find an applicable Approval. Put your cursor in the field and click *Fill* to bring up the current list of Approval names and double-click an Approval name to select it from the list.

Approval Controls Area

Field	Description
Reset	If set to *true*, resets all approvals and reevaluates the conditions on all possible Approval Definitions.
Recalc	If set to *true*, recalculates the Approval Definitions for all current approvals.
Retain	If set to *true*, retains current approvals if the phase changes.
Use Line Item/Model Approvals	Additionally calculate approval conditions for the meanings in the line item and model definitions.

Model/Line Items tab

The Model/Line Items tab provides the ability to specify a model quote or order and line item rules.

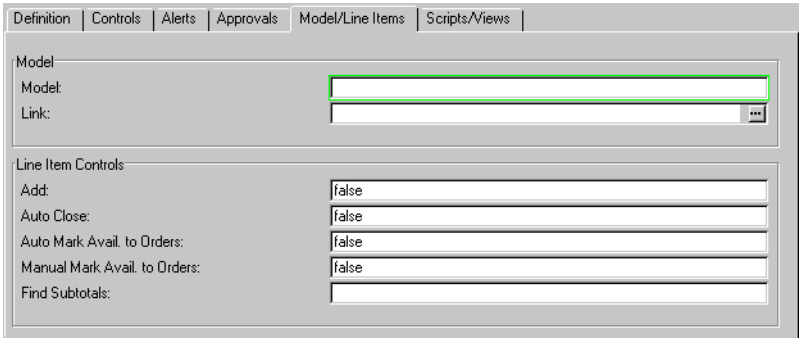

Figure 3-12: Model/Line Items tab

Model Area

Field	Description
Model	The number of the model quote or order.
Link	Link record to be used to copy information from the model record into the current record.

Line Item Controls

Field	Description
Add	Allows (*true*) or disallows (*false*) line items to be added within this phase.
Auto Close	Allows (*true*) or disallows (*false*) line items to be automatically closed within this phase.
Note: *Especially important* on this tab are the next two fields, Auto Mark Avail to Orders and Manual Mark Avail to Orders.	
Auto Mark Avail. to Orders	If set to *true*, defines when the system should mark the quote line item as available for order processing.

Field	Description
Manual Mark Avail. to Orders	If set to *true*, controls when this menu option is available to the operator to mark the quote line item as available for order processing.
Find Subtotals	Allows (*true*) or disallows (*false*) line items to be subtotaled within an order.

Scripts/Views tab

The Scripts/Views tab provides information for special scripts to be used when a line item of this phase is opened, updated, closed, and so forth, and to set up the default view for displaying information on the line item in this phase. Initially, there is an out-of-box default view already set up in the **Default View** field.

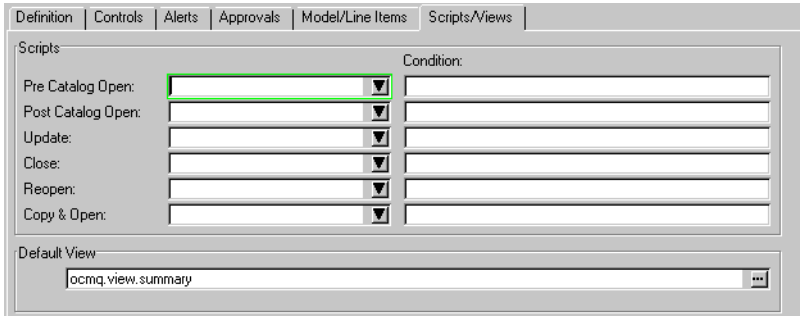

Figure 3-13: Scripts/Views tab

Scripts Area

Field	Description
Pre Catalog Open	The script to be used when an operator begins to open a new quote, before the catalog is accessed.
Post Catalog Open	The script to be used when an operator has selected items from the catalog.
Update	The script to be used during the update process for the operator to provide further comments on the record in this phase.
Close	The script to be used during the close process for the operator to provide further comments on the record in this phase.

Field	Description
Reopen	The script to be used during the reopen process for the operator to provide further comments on the record in this phase.
Copy & Open	The script to be used during the copy and open process for the operator to provide further comments on the record in this phase.
Condition	Conditional settings for the scripts. For example, the reopen condition must evaluate to *true* before the reopen process occurs.
Default View	The default view set up for the record in this phase.

Line Item Phase

To add a line item phase:

1. Open the Request Management menu.
2. Click Line Items tab.
3. Click **Line Item Phases** on the Line Items tab.

   A blank phase definition form (*ocmoptions.l*) displays.

4 Pass a *true* query by clicking **Search** without providing any additional information in the form. Figure 3-14 shows a list of existing line item phase definitions.

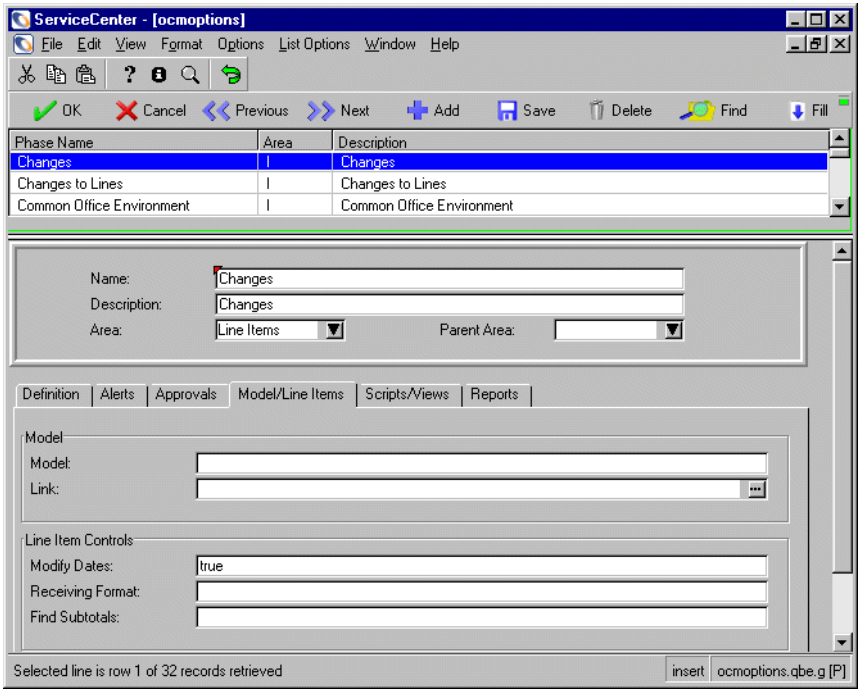

Figure 3-14: Line Item Phase Definition

5 From this list, select a phase definition to base your new line item phase on by clicking on the name. The phase definition (*ocmoptions.l*) form appears, containing the definition data of the selected line item phase.

6 Modify the phase record with your information. See the information provided about the tabs described in *Quote Phases* on page 76. See also other differences described in the explanations and notes listed below.

- The Reports tab lists the specialized Crystal Reports, which are to be run on issues, such as performance and order-to-receipt time, related to a line item in this phase.

- *Especially important* on this form is the **Parent Area** field that designates which parent area must be valid for a line item under this phase. If *NULL* (left blank), all line items under this phase will use this phase definition.
- When the **Modify Dates** field in the Line Item Controls structure is *true*, this allows you to change the ordering dates of a line item; if *false*, the dates cannot be modified. If left blank, the default value is *false*.

7 Click **Add** to save and add the new phase to the system.

8 Do one of the following:

- When prompted (status at the bottom of the window displays a message that states: *Ready*), click **Add To All** to add this new line item phase definition to all events. See Figure 3-8 on page 78.
- If you want to restrict the phase to certain events, select only those events and click **OK**. (*Do not* click Add To All.)

Order Phase

To add an order phase:

1 Open the Request Management menu.

2 Click Orders tab.

3 Click **Order Phases** on the Orders tab.

A blank phase definition form (*ocmoptions.o*) displays.

4 Pass a *true* query by clicking **Search** without providing any additional information in the form. Figure 3-15 shows a list of existing order phase definitions.

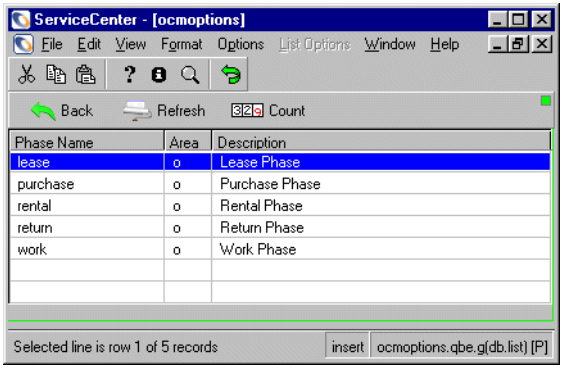

Figure 3-15: Order Phase Definition

5 From this list, select a phase definition to base your new order phase on by clicking on the name.

The phase definition (*ocmoptions.o*) form displays, containing the definition data of the selected order phase.

6 Modify the phase record with your information. See the information provided about the tabs described in *Quote Phases* on page 76.

Note: The Reports tab lists the specialized Crystal Reports, which are to be run on issues, such as performance and order-to-receipt time, related to an order in this phase.

7 Click **Add** to save and add the new phase to the system.

8 When prompted (status at the bottom of the window will display *Ready*), click **Add To All** to add this new line item phase definition to all events. See Figure 3-8 on page 78.

9 If you want to restrict the phase to certain events, select only those events and click **OK**. *Do not* click Add To All.

Viewing Phases

Quote Phase

To view a quote phase:

1 Open the **Request Management** menu.

2 Click **Phases** on the Quotes tab.

A blank phase definition form (*ocmoptions.q*) for quote phases displays.

3 Pass a *true* query by selecting **Search** without providing any additional information in the form. A list of existing quote phase definitions appears as shown in Figure 3-7 on page 77, along with the first record in the list.

4 From this list, select a phase definition to view by clicking on the name.

The phase definition (*ocmoptions.q*) form contains the definition data of the selected quote phase.

Each of the tabs contains information relevant to system behavior and the level of control an operator will have on a quote in this phase. See the information provided about the tabs described in *Quote Phases* on page 76.

Line Item Phase

To view a line item phase:

1. Open the **Request Management** menu.
2. Click **Line Item Phases** on the Line Items tab. A blank phase definition form (*ocmoptions.l*) for line item phases appears, as shown in Figure 3-14 on page 86.
3. Pass a *true* query by selecting **Search** without providing any additional information in the form. A list of existing line item phase definitions appears.
4. From this list, select a phase definition to view by clicking on the name.

   The phase definition (*ocmoptions.l*) form contains the definition data of the selected line item phase. See the information provided about the tabs described in *Quote Phases* on page 76. See other explanations and notes below.

   - The Reports tab lists the specialized Crystal Reports, which are to be run on issues, such as performance and order-to-receipt time, related to a line item in this phase.
   - *Especially important* on this form is the **Parent Area** field shown in Figure 3-14 on page 86, because it designates which parent area must be valid for a line item under this phase. If *NULL* (left blank), all line items under this phase will use this phase definition.
   - When the **Modify Dates** field in the Line Item Controls structure shown in Figure on page 86 is **true**, this allows you to change the ordering dates of a line item; if *false*, the dates cannot be modified. If left blank, the default value is *false*.

Order Phase

To view an order phase:

1. Open the **Request Management** menu.
2. Click **Phases** on the Orders tab.

   A blank phase definition form (*ocmoptions.o*) for order phases displays.
3. Pass a *true* query by selecting **Search** without providing any additional information in the form.

   A list of existing order phase definitions is displayed.

Note: Figure 3-16 shows the list that appears when Record List in the View menu is not selected (unchecked).

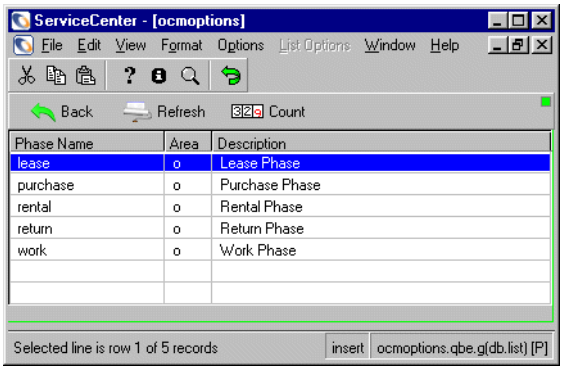

Figure 3-16: Order Phases view

4 From this list, select a phase definition to view by clicking on the name.

The phase definition (*ocmoptions.o*) form contains the definition data of the selected order phase.

Each of the tabs contains information relevant to system behavior and the level of control an operator will have on an order in this phase.

Model File

The *model* (*catalog*) file defines the components an operator may order, using the unique key of Part Number to separate items. The file also contains all associated component relationships within the catalog.

The model record contains information, such as:

- The rules for processing this component when it is a line item as part of a quote or order.
- References to component parts included with this parent.
- The names of approval definitions that this component must have when it is added to a quote or an order.
- If this part has components, the rules for selecting the dependent components.
- The quantities of this component that are in use, on hand, on order, and so forth.

The information in the model record is copied to the quote line item.

Views

The *model* file has two different format views available:

- *ocmco* (the *catalog view*)
- *model* (the *model view*)

Catalog (*ocmco* or *ocmo.detail*) View

The *ocmco* (the *co* stands for component) form is one of the ways of viewing the **model** file. It displays the runtime processing control options for each part and the relationship of one part to another. Each item has its own unique component definitions.

To view a file:

1 From the main Request Management menu, click **Supporting Files** on the Maintenance tab.

2 Click **Catalog** in the Catalog tab.

From this approach the Request Management Component Definitions default form (*ocmco*) appears, as shown in Figure 3-17.

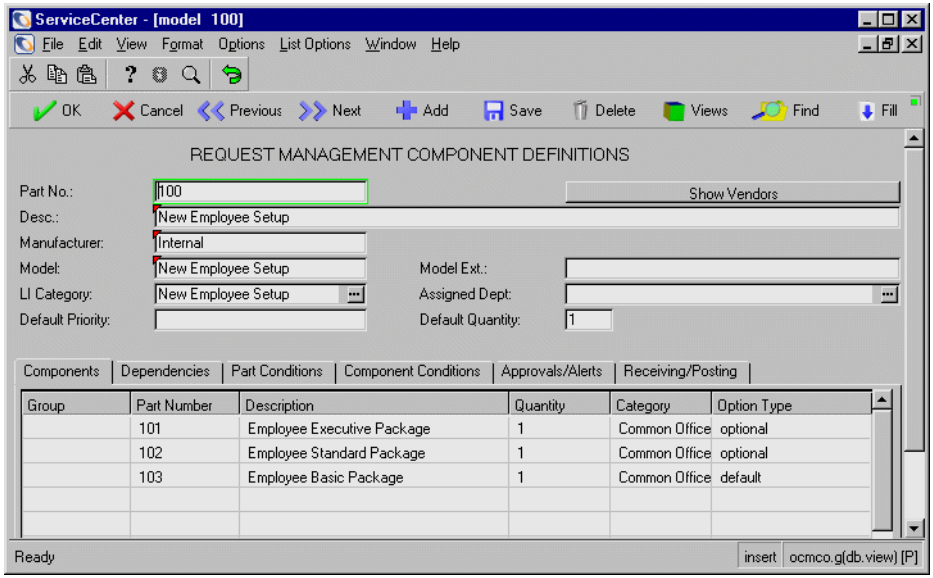

Figure 3-17: Device Information in ocmco view

3 To display alternative views of a record, pass a *true* query by clicking **Search**, or call up a specific record.

4 Click **Views** in the system tray. The list of alternate views is displayed.

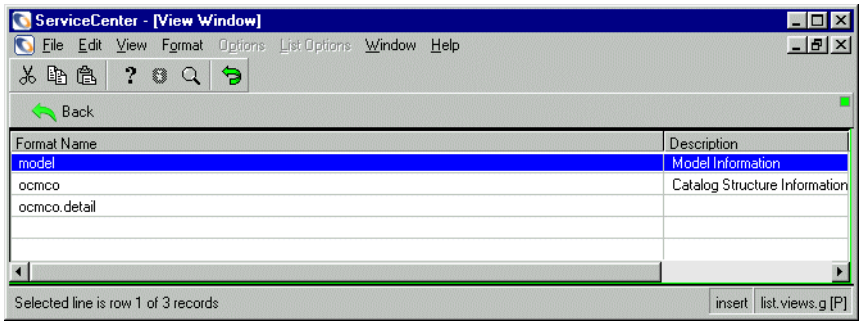

Figure 3-18: Optional ocmo list.views

Use the following field definitions to identify the type of data required and provided on the *ocmco* form:

Field	Description
Part No	The unique identifier of the particular component. Linked to the Parent field so that Find returns any components of this item.
Desc *(required)*	Brief description, used for QBE and record lists.
Manufacturer (*required*)	The manufacturer of this component; validated against the vendor file. (Same as on *model* form.)
Model (*required*)	A unique definition for the component, usually defined by the manufacturer. (Same as on *model* form.)
LI Category	The line item category to which this part is associated. Each part in the catalog must belong to a line item category (same as on model format).
Default Priority	The order in which items are presented for selection when a part is being selected from the Catalog during the line item open process.
Show Vendors button	Finds all vendors for this item and presents the associated *modelvendor* records.
Model Ext	Displays extension applied to model number for more specific identification.

Field	Description
Assigned Dept	If requests for this part are always assigned to the same department, you can enter that department here.
Default Quantity	The default number of parts to be ordered. If the field is left blank, the default number is set to one.

Components tab

The information in this tab gives details about this part. See the Components tab shown in Figure 3-17 on page 91.

Field	Description
Group	The name of the group to which this part is linked.
Part Number	The sequence of the numbering scheme for this part.
Description	A brief description of this part.
Quantity	The number of parts to be ordered for this part. If the field is left blank, the default number is set to one.
Category	The category, or categories, to which this part is associated.
Option Type	The option type for the grouping order of this part. Required, default, or optional.

Dependencies tab

The information in this tab forms a grouping order, creating dependencies according to how groups are set up and setting up dependency types.

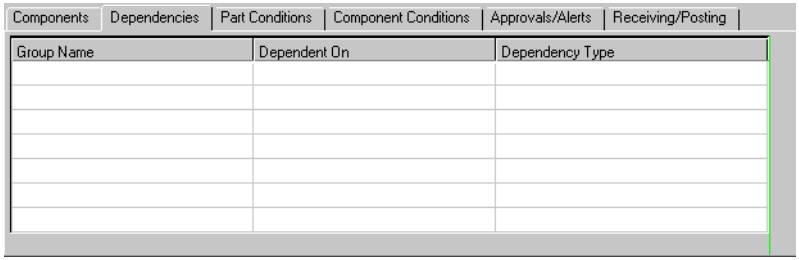

Figure 3-19: Dependencies tab

Field	Description
Group Name	Define the primary grouping for catalog items and parts.
Dependent On	Set up dependencies according to how parts are grouped.
Dependency Type	Select a dependency type, according to your stockroom options. When a part is received, it may be marked as: "in stock" and left active *-or-* "closed" This depends on your office workflow.

Part Conditions tab

Figure 3-20 shows the Part Conditions tab.

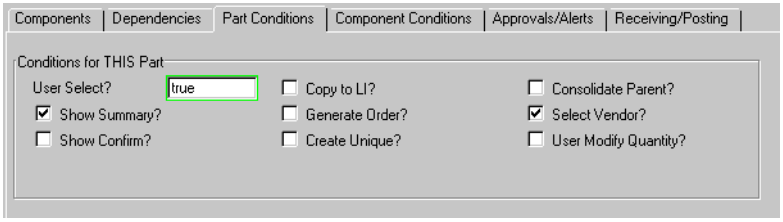

Figure 3-20: Part Conditions tab

Conditions for This Part Area

Field	Description
User Select?	A field to control when the operator can select this particular item. If true, the operator can select the item during the quote open process; if not, the item will not display for selection.
Show Summary?	Controls whether the operator is shown a preview of a part's sub-components before proceeding to part and vendor selection.
Show Confirm?	Controls whether the operator is shown the selected parts summary and confirmation screen after making part/vendor selections.
Copy to LI?	Controls which Catalog entries are opened as line items. For instance, "phantoms" would normally not be copied to a line item, so this field would usually be set to *false* for phantoms; however, it may be beneficial for clarity of the structure of an item to copy the phantom. **Note:** If the Defer Selection field in the Component Conditions tab is true, the entry is always copied to the line item regardless of the value in the Copy to LI? field.
Generate Order?	A field to allow control over which quote line items are available for order processing.
Create Unique?	Controls if the system creates some number of unique line items for this part, based on the quantity defined in the Parent Qty field.
Consolidate Parent?	Controls when this part is consolidated to the Parent Part, that is, where the parent line item field points to the line item number that was opened to fulfill the requirements of this Part's parent. If *true*, on-hand inventories for this part or the parent cannot be consumed.
Select Vendor?	Controls when operators are responsible for selecting the vendor for the items they select. If vendor selection is deferred, someone else (normally the coordinator of the line item or quote) must access the line item and manually select a vendor.
User Modify Quantity?	Controls when the operator can override the default ordering quantities during the line item open process.

Component Conditions tab

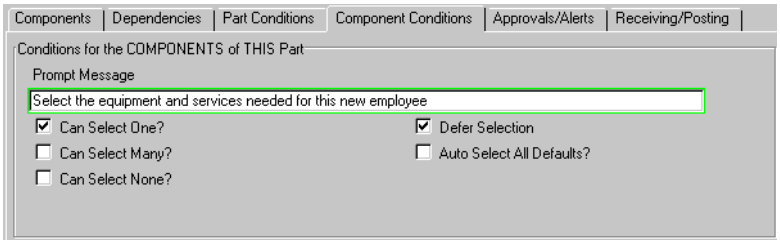

Figure 3-21: Component Conditions tab

Conditions for the Components of This Part Area

Field	Description
Prompt Message	A character field to control the message sent to the operator prompting a selection of the sub-components of this particular item. If *NULL*, the system sends the message, These are the available options for Part <part number> <part description>.
Can Select One? -- Can Select Many? -- Can Select None?	Fields that control how many components of this particular item the operator can select during the line item open process.
Defer Selection	Controls when the operator selects the components of an item. If *true*, the operator does not select the components.
Auto Select All Defaults?	Defines if the system should automatically select the default components of this particular item.

Approvals/Alerts tab

Figure 3-22: Approvals/Alerts tab

Field	Description
Approval Names	The approval groups or individuals who must approve the Quote when this item (Part) is opened as a line item definition. Defining this field at the **part** level (rather than at a **phase** level within a category) provides a way to differentiate particular line items for approval. For instance, if two parts are in the same line item category but one has a *NULL* value in this field and the other has a valid Approval group defined, the latter will require approval by that group.
Alert Names	The alert definition that will be scheduled for processing when this item (part) is opened as a line item.

Receiving/Posting tab

If you are receiving parts and logging them into ServiceCenter, you need to set up the information in this tab.

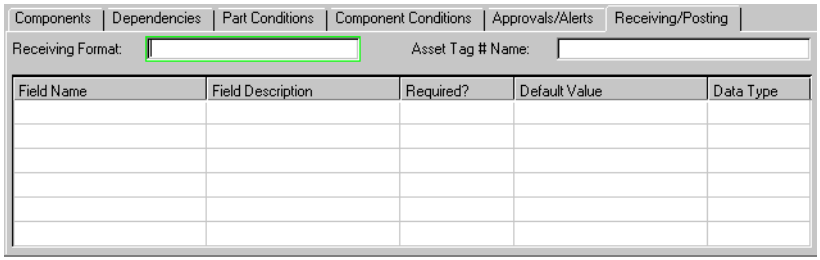

Figure 3-23: Receiving/Posting tab

Field	Description
Receiving Format	How this part is to be received from the vendor.
Asset Tag # Name	Create an asset tag number name to identify the part when it is received.
Field Name	The field name where the receipt information is to be logged.
Field Description	A brief description of the field.
Required?	Is this information required? (*True=yes, false=no.*) If left blank, the default is *false (no)*.
Default Value	The value of this part. If left blank, the default is *zero*.
Data Type	What data type, so that queries can be performed.

Available Options

Summarize—Summarizes the current parent-component definitions into an array which shows at a glance the relationship of various line items.

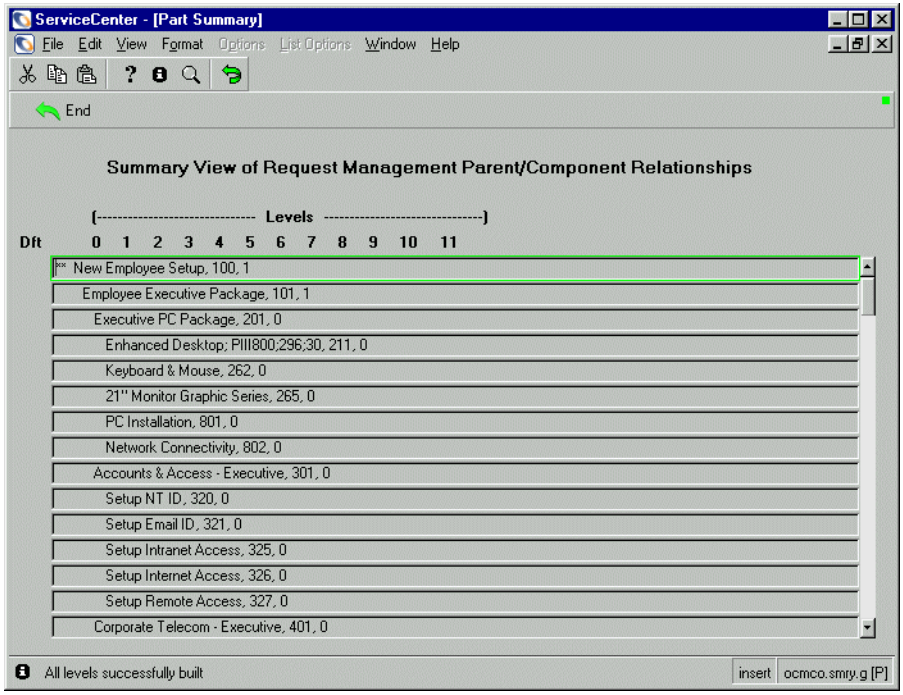

Figure 3-24: Component Summary View

When you select the **Summarize** option from the Options menu, the levels are built and a text report is generated and displayed on the *ocmco.smry* form.

Each element in the summary array corresponds to a component record in the model file.

Each summary line contains:

- The ** designates the item as a Default item (the Default condition for the item is set to *true* on the *ocmco* format)
- The Description
- The Part No
- The Quantity required for this item

- Placing the cursor on any element in the list and pressing **Enter** presents a display only summary of the *model* record for that item, on the *model.summary* format.
- Clicking **Find** from within the **Part No** field displays associated *modelvendor* records.
- Clicking **Find** within the **Part No** field from the *modelvendor* form displays the complete associated model record.

Print confg—calls Report Exerciser and displays the report ocmco.print.config, which builds the same summary array as in the summarize option and prints detailed information on all components in the summary.

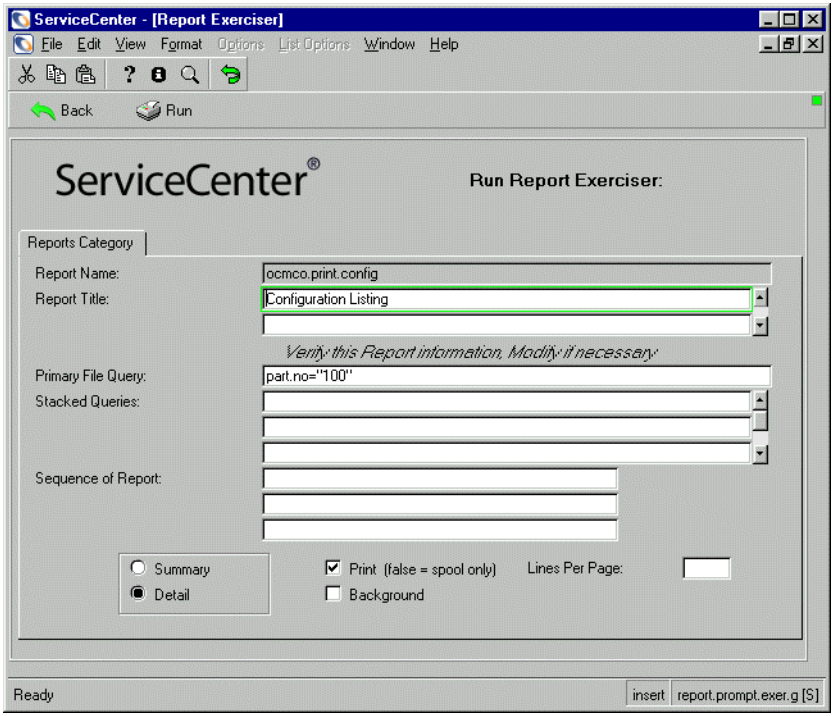

Figure 3-25: Component Print Configuration

This example shows the Report Maintenance screen describing the **ocmco.print.config** report. The primary query reflects the part that was displayed when the **print confg** option was selected.

The report itself shows information from the **model** file for each of the components listed in the summary array discussed in the summarize option.

Print detl—calls Report Exerciser and displays the report **ocmco.print.detail**, which builds the same summary array as in the summarize option and prints detailed information for the specific component on the current record.

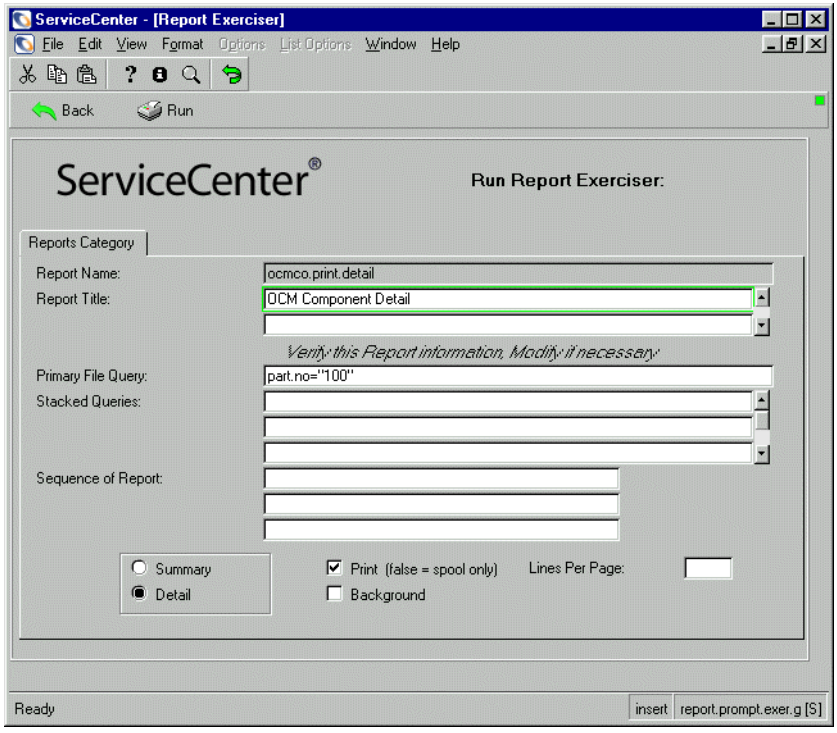

Figure 3-26: Component Print Detail

This example shows the Report Maintenance screen describing the **ocmco.print.detail** report. The report itself shows the detailed information from the *model* record for the part that was displayed when the **print detl** option was selected.

Alternate views of the **model** file are available when you click **Views** in the tool bar. The following describe what is displayed in the alternate views, such as the *Catalog (ocmco or ocmo.detail) View* on page 91 and *Model View* on page 102. Added options available while in these views is discussed in *Additional Options* on page 112.

To add information:

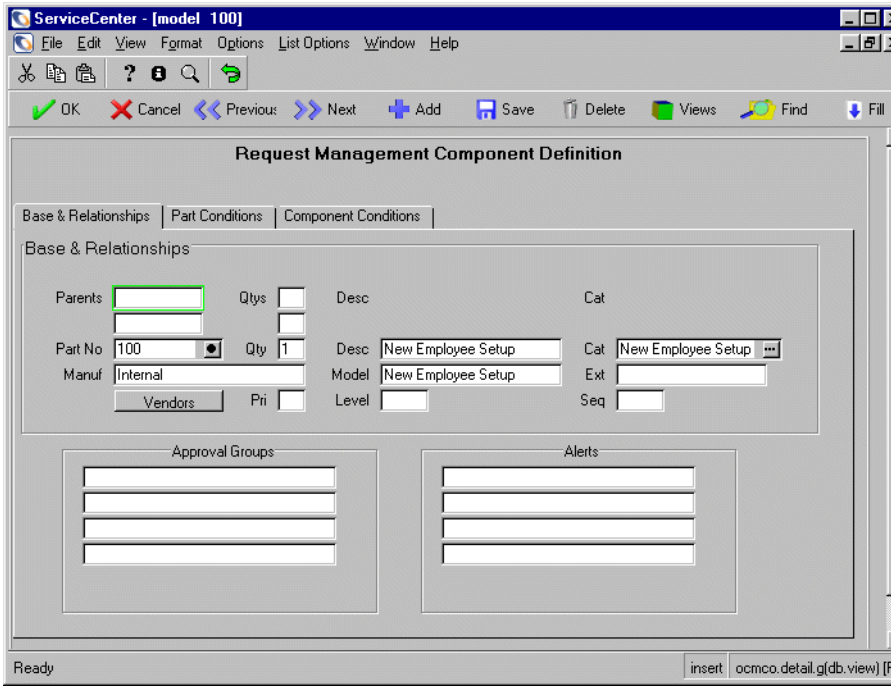

Figure 3-27: ocmco.detail View of Record Data

Model View

The *model* form is an alternate view of the *model* file. It displays the main part specifications and order fields, tied in with the current inventory, and provides control over when to reorder this item.

To display the *model* alternative view of a record while viewing a record:

1 Click **Views** in the system tray.

2 Double-click the **model** option to select it from the record list that ServiceCenter creates, shown in Figure 3-18 on page 92.

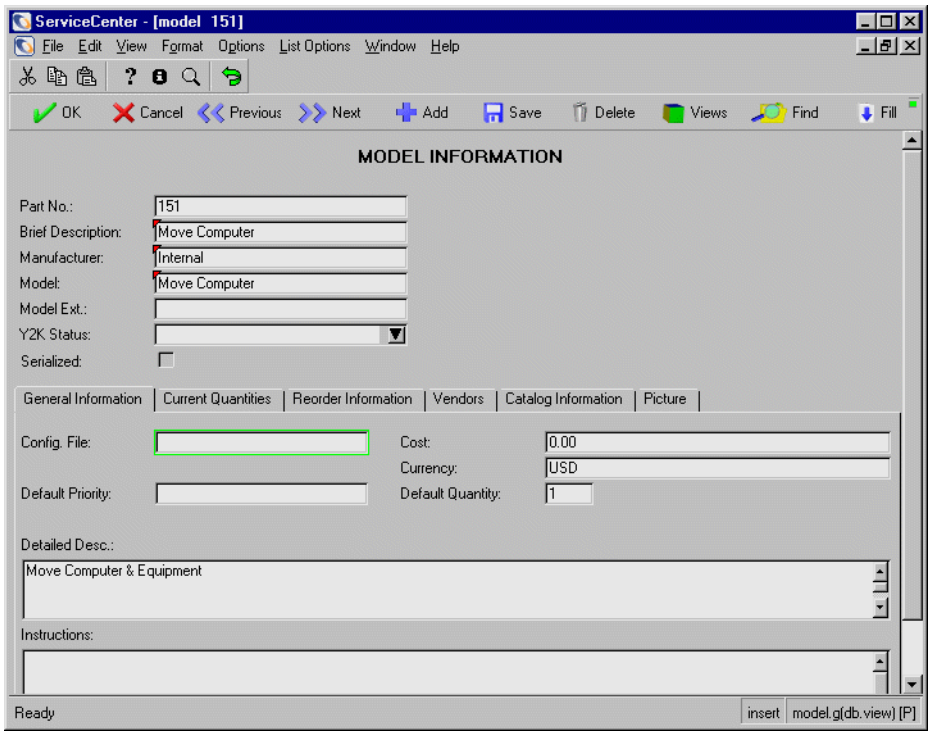

Figure 3-28: Model view of model information

Use the following descriptions of the *model* form fields to identify the data contained and add or modify the data as needed.

Field	Description
Part No	The unique identifier for this Catalog entry; system-generated if not entered by operator when adding the record.
Brief Description *(required)*	The brief text description used for QBE list.
Manufacturer *(required)*	The manufacturer of this component; validated against the vendor file.
Model *(required)*	A unique definition for the component, usually defined by the manufacturer.

Field	Description
Model Ext.	Displays extension applied to model number for more specific identification.
Serialized	Designates if this component is serialized or non-serialized, that is, to be tracked by individual units by serial number or simply by quantities; affects the order generating process and the receiving process.

General Information tab

See the General Information tab shown in Figure 3-28 on page 103.

Field	Description
Config File	The name of the file to which data is posted when this type of inventory record is received.
Default Priority	A default number to control the order in which items are presented for selection from the Catalog when opening a line item.
Cost	The price tag assigned to or associated with this item when it is replaced.
Currency	The Currency in which the associated cost is stated.
Default Quantity	The default quantity set for this item.
Detailed Desc	Text description of the record; copied to the line item description in the quote summary and printed on orders and reports.
Instructions	Any special instructions or information needed for completion or assembly of this particular Catalog entry.

Current Quantities tab

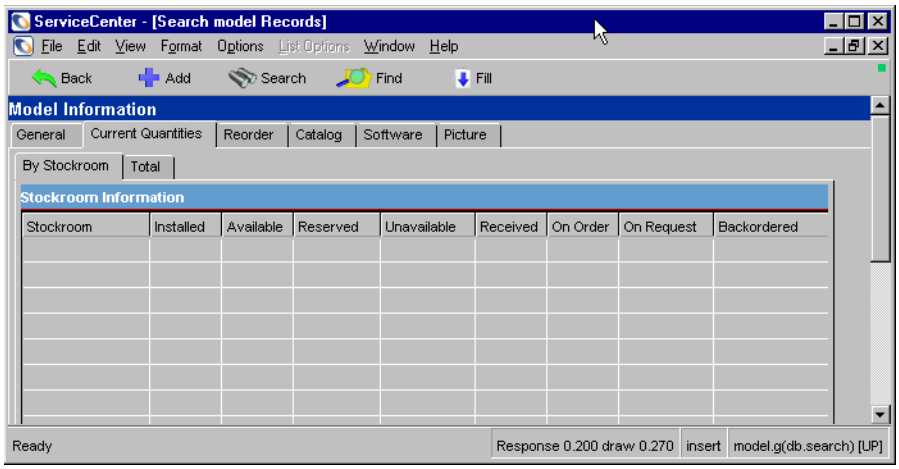

Figure 3-29: Current Quantities tab

Total: By Stockroom Area

Field	Description
Installed	For serialized items, the number of units in the device file listed as *installed*; for non-serialized items, the number of units that have been delivered over the life of the item.
Available	For serialized items, the number of units in the device file listed as *available*; for non-serialized items, the current on-hand quantity.
Reserved	For serialized items, the number of units in the device file listed as *reserved*; not used for non-serialized items.
Unavailable	The number of units in the device file that are listed as *unavailable*.
Received	For both serialized and non-serialized items, the number of units currently *received*--that is, logged during the order line item receiving process but not yet posted to the appropriate inventory file.
On Order	For both serialized and non-serialized items, the number of units currently on order.

Field	Description
On Request	For both serialized and non-serialized items, the number of units currently on request.
Backordered	For both serialized and non-serialized items, the number of units currently back ordered.

Reorder tab

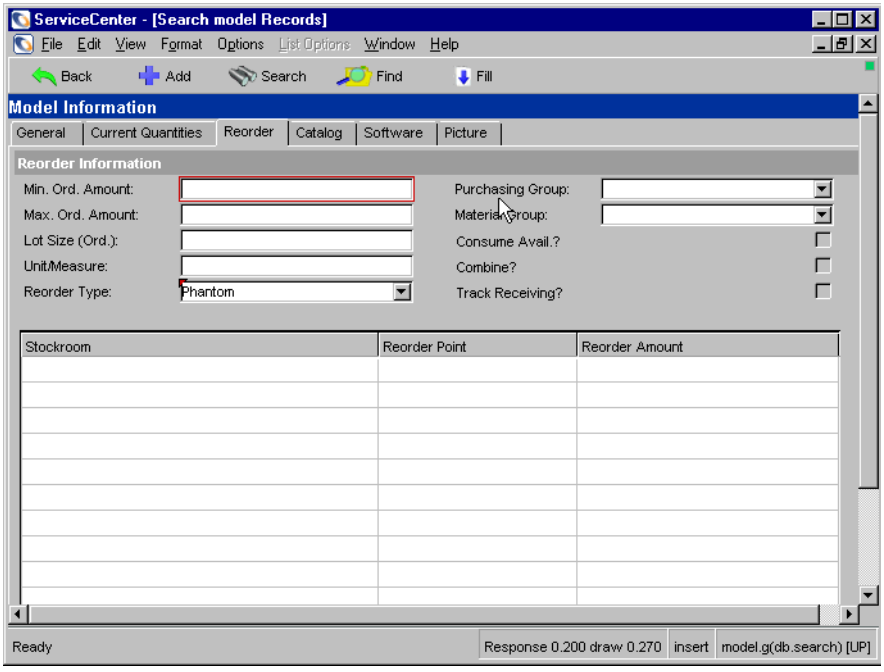

Figure 3-30: Reorder Information tab

Field	Description
Min Ord Amount	The minimum order quantity for this item; if an operator requests less than this amount, the requested amount is adjusted upward to this amount.
Max Ord Amount	The maximum order quantity for this item; if an operator requests more than this amount, the requested amount is adjusted down to this amount.
Lot Size (Ord)	The lot size used when the item is ordered from a vendor; the order amount is a multiple of this number, or if not, is adjusted accordingly.

Field	Description
Unit/Measure	The standard unit of measure for this item (using a validity table).
Reorder Type	*(required)* A control field designating the type of processing used when an item is ordered. Valid values: ■ *batch* - The Order Generation application ocmo.create.order attempts to fill quote line items with available inventory (if the Consume Avail? field is checked); to order according to a planned time and in batches; and is the only way to combine multiple quote line items into one order line item for discounts advantages. ■ *immediate* - When a quote line item is marked available for ordering, an order create record is scheduled for immediate processing of that one item. ■ *phantom* - No ordering is performed for a phantom part.
Purchasing Group	The purchasing group from which this part is ordered.
Material Group	The type of materials (or services) needed, such as office supplies, computer supplies, or outside services.
Consume Avail?	Designates if available inventory is to be consumed when the line items within an order are processed. The default is *false*.
Combine?	Designates if the order generation application ocmo.create.order combines quote line item quantities into one order line item. The default is *false*, so that a unique order and order line item are created for each quote line item.
Track Receiving?	Designates if the order line item for this component is *received* into the system, with information recorded in the receiving log. If *false*, the line item is *closed* but not *received*.
Stockroom	Designates a stockroom where this part should be received.
Reorder Point	When on-hand inventory drops below this number, the quantity shown in the Reorder Amount field is ordered, if the Reorder Type field is set to *batch*.
Reorder Amount	The amount ordered when the on-hand inventory drops below the value in the Reorder Point field, if the Reorder Type field is set to *batch*.

Vendors tab

The Vendors tab stores specific vendor information for a product.

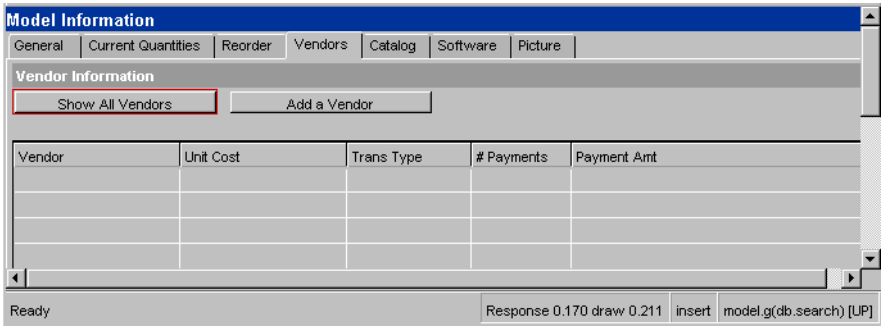

Figure 3-31: Vendors tab

Field	Description
Show All Vendors button	Finds all vendors for this item and presents the associated modelvendor records, through a Link record performing a search on the Part No of this model record.
Add a Vendor button	Add a vendor in the modelvendor records. See *Modelvendor File* on page 113 to learn more about filling in the *modelvendor* form.
Vendor	Name of vendor.
Unit Cost	Total monetary value of this part.
Trans Type	Transaction type, such as *purchase*.
# Payment	Number of payments to be made for the cost of the part.
Payment Amt	Monetary value to be paid each time a payment is made.

Catalog tab

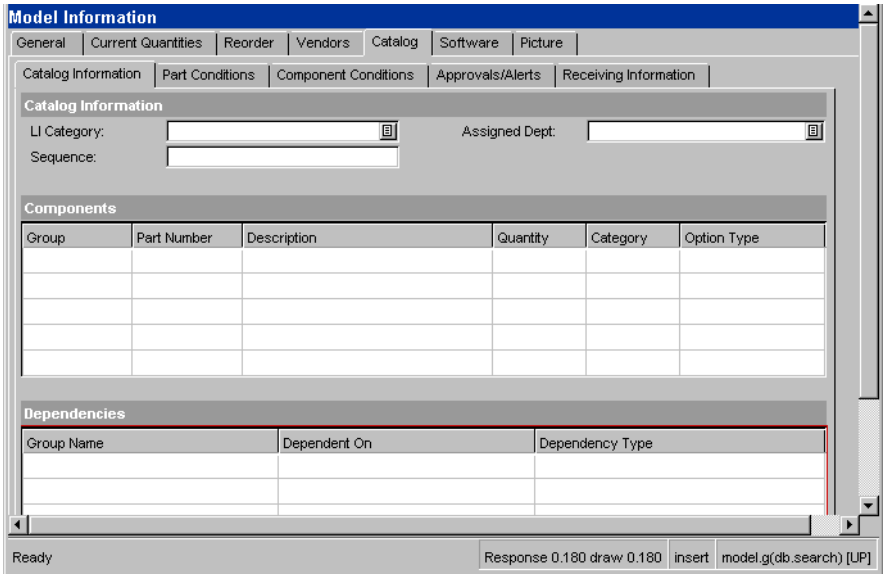

Figure 3-32: Catalog Information tab

The Catalog Information tab stores all the information about the inventoried parts and items, including:

- Components - see *Components tab* on page 93.
- Dependencies - see *Dependencies tab* on page 94.
- Part Conditions - see *Part Conditions tab* on page 94.
- Component Conditions - see *Component Conditions tab* on page 96.
- Approvals/Alerts - see *Approvals/Alerts tab* on page 97.
- Receiving/Posting - see *Receiving/Posting tab* on page 97.

Field	Description
LI Category	The line item category to which this part is associated. Each part in the catalog must belong to a line item category (same as on model format).

Field	Description
Assigned Dept	If requests for this part are always assigned to the same department, you can enter that department here.
Sequence	Used to sort the list of parts for a specific category. **Note:** You can modify the sort order within the **Sequence** field by selecting the *category* key in the *model* file. Once selected, enter the **Category** field first, and then enter other field names according to the order in which you would like the parts sorted.

You can define and control how items/parts are ordered, grouped, approved, received, and posted.

Software tab

Figure 3-33 shows the Software tab.

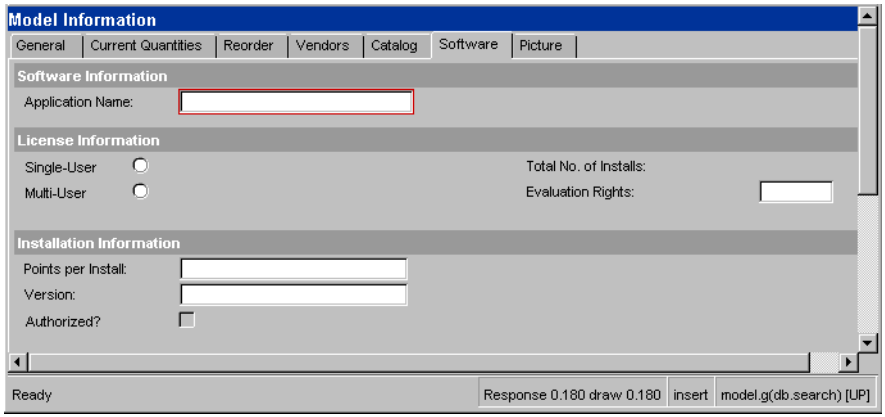

Figure 3-33: Software tab

The Software tab displays information about software, licenses, and installation.

Field	Description
Application Name	The name of the licensed software product.
Single User	Select if the application is software to be installed on a single workstation for a single user.

Field	Description
Multi-User	Select if the software is Client/Server or resides on a file server. When you click Multi-User, a list appears. Select Per named workstation, Per named user, or Per concurrent accesses, which is a limit on the number of licenses in use at any time.
Total Number of Installs	If you specified Multi-User, type the number of installations. A single-user installation appears as 1.
Evaluation Rights	The maximum number of installations for demonstration or evaluation purposes.
Points Per Install	For certain types of licenses, the number of points each license right consumes.
Version	Displays the software version number.
Authorized?	Checked if this is an authorized version to use.

Picture tab

Figure 3-34 shows the Picture tab.

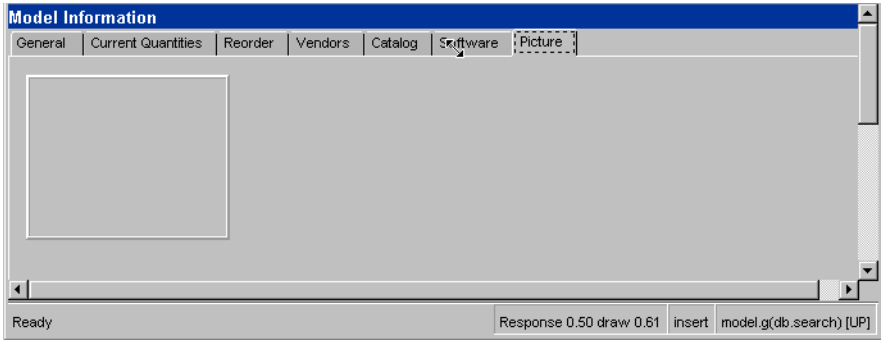

Figure 3-34: Picture tab

Insert a bitmap into the model record. Right-click on the grey box, select **Insert bitmap**, and browse your directory to locate the bitmap.

Relationships

Modelvendor File

The **Part No** field establishes the relationship between the *model* and the *modelvendor* files. This relationship is maintained by the **model.validate.vendor** application, called by Format Control Subroutines.

If the operator:

- changes the Part No, all associated modelvendor records are automatically updated.
- deletes a model record, all associated modelvendor records are automatically deleted.
- copies an existing model record, a QBE list of associated modelvendor records is displayed with the option of copying all or specific records.

Receiving

The **Track Receiving?** field controls whether the receiving process will occur for this part. This is independent from the **Serialized field**, so items can be received without being limited to particular configuration rules. In other words, the part does not need to be serialized to be received.

The **Serialized** field impacts the receiving process in that for each serialized item received, such as 3 qty, the serial number for each must be specified during receiving, and 3 records are created in the receiving log.

Additional Options

By pulling down the **Options** menu while viewing a model record (via ocmco, ocmco.detail or model form), several additional operator options allow the operator additional control of how the data can be presented.

From the *ocmco* and *model* views, the **Options** menu has the following additional controls:

Field	Description
Print	Send a copy of the record to the default printer.
Validity Lookup	Checks the selected field against the ServiceCenter validity tables for that field.

Field	Description
Export/Unload	Allows you to export this record into a file for importing into a spreadsheet, or unload this dataset for loading into another ServiceCenter system. Basically, you can export information to any product that has DDE (Dynamic Data Exchange) support.
IR Query	Accesses ServiceCenter's IR (Information Retrieval) Expert application.
Expand Array	Add a field to an array (list of elements of the same data type accessed by an index or element number). A separate window is displayed to enter the data.
Take inventory	Runs the *model.take.inventory* application to search the file in Config File field for all items in the inventory with the same Part Number and totals based on Status (*installed, reserved, available, unavailable*); then calculates in the ocml file the number for *on order*, *on request*, and *received*.

Modelvendor File

The modelvendor file provides relational information between a particular part, or model, with an associated vendor(s) for that part. Some of the information tracked includes various costs, lead times, and payment schedules each vendor offers for a particular item.

To access the file from the main Request Management menu:

1 Click **Supporting Files** in the Maintenance tab.

2 Click **Model Vendors** in the Catalog tab.

Figure 3-35 shows the *modelvendor.g* format.

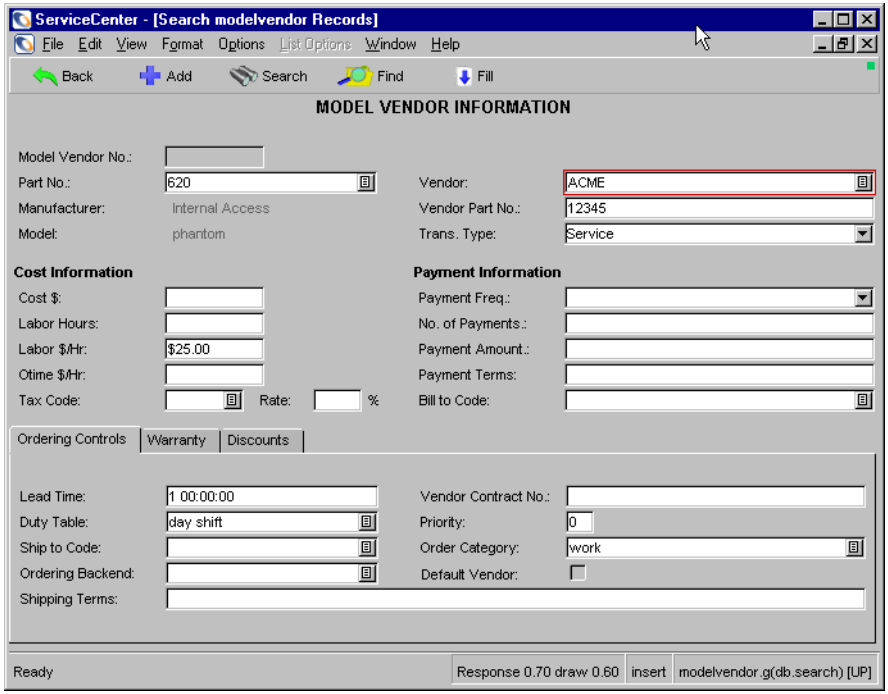

Figure 3-35: Modelvendor Form

Use the following field descriptions to identify field values and contents:

Field	Description
Model Vendor No	Display only, unique sequential number system-generated for each *modelvendor* record. Copied to the quote line item.
Part No	*(required)* The unique identifier of the item defined in the model file that relates to this modelvendor record. This field establishes the link between the *model* and modelvendor files, and is validated against the model file.
Manufacturer	Displays information from the model file, associated with the Part No.
Model	Displays information from the model file, associated with the Part No.

Field	Description
Vendor	*(required)* The name of the organization that provides the particular service or product. This field has a link to the vendor file, and is validated against that file.
Vendor Part No	The part number assigned to this item by this particular vendor.
Trans Type	*(required)* The type of service provided by the vendor for this item. Valid values: *purchase, lease, rental, service, maint.*

Cost Information Area

Field	Description
Cost $	The total monetary value charged by the vendor for the service or product.
Labor Hours	The number of hours required to complete the defined unit of work.
Labor $/hr	The per hour labor cost.
Otime $/hr	The per hour overtime labor cost.
Tax Code	Identifies a record in the *taxcodes* file that contains the actual tax rate. This field is copied to the quote line item.
Rate	The link on Code populates the Rate field, but the value can be modified to override the rate stored in the taxcodes file. This field is copied to the quote line item.

Payment Information Area

Field	Description
Payment Freq.	The frequency that the vendor expects payment for the service or product.
No. of Pmts	The total number of times the vendor allows payments of a fixed portion of the cost. *NULL* or zero (0) indicates that the balance must be paid in full in one payment.
Payment Amount	The cost of each payment, calculated by dividing Cost by No. of Pmts. If No. of Pmts is *NULL* or zero (0), Payment Amount equals the Cost.

Field	Description
Payment Terms	The payment terms defined by the vendor.
Bill to Code	The location code (from the *location* file) of where the vendor should mail the invoice for the items shipped to your organization.

Ordering Controls tab

See the tab shown in Figure 3-35 on page 114.

Field	Description
Lead Time	The number of days advance notice the vendor requires to deliver the product or service. Expressed as a date/time relative to current date/time and to Duty Table; the default is zero (0).
Duty Table	The name of the Calendar Duty Table that Lead Time is calculated against in order to arrive at a date. If *NULL*, the system calculates Lead Time against a 24/7 time table.
Ship to Code	The location code (from the location file) of where the vendor should ship goods when receiving orders for this particular item.
Ordering Backend	If ordering backend services or line items, select the vendor to be used for the *avail-to-order* items.
Shipping Terms	A description of the terms that the vendor is requested to use when shipping goods to your location.
Vendor Contract No.	The contract number between your organization and the vendor that establishes a business relationship. Copied to the quote line item.
Priority	The priority of this vendor record relative to the other vendor records for this particular item. Controls the order in which vendors are displayed on the vendor QBE list. Defaults to 0 (zero) as the first in priority.
Order Category	The name of the order category used by the system when creating orders due to on-hand replenishment requirements. (The Order Category field in the *Order Processing Schedule* record overrides this field.)
Default Vendor	The default vendor to be used, if a user is not authorized to select a specific vendor.

Warranty tab

A description of any warranties offered by the vendor for this particular item.

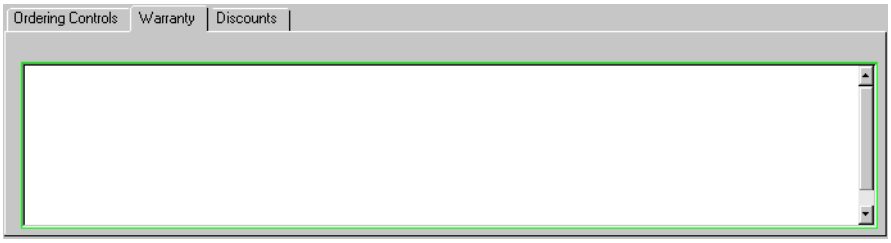

Figure 3-36: Warranty tab

Discounts tab

Figure 3-37 shows the Discounts tab.

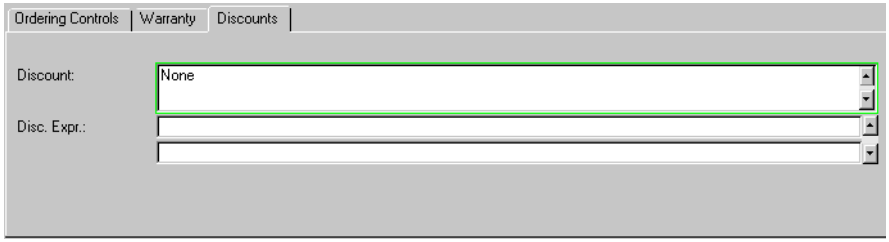

Figure 3-37: Discounts tab

Field	Description
Discounts	A description of any special discounts offered by the vendor for this particular item.
Disc Expr	Discount expressions are the processing statements executed, at open time, to apply discount calculations to the line item when an order line item is created. (Use variables *$model* for the current model record and *$L.file* for the current order line item.)

Vendor File

The **vendor** file provides contact and services information for a particular vendor.

1 Access the file from the main ServiceCenter menu. Click **Vendors** in the Support tab. Figure 3-38 shows the *vendor* form.

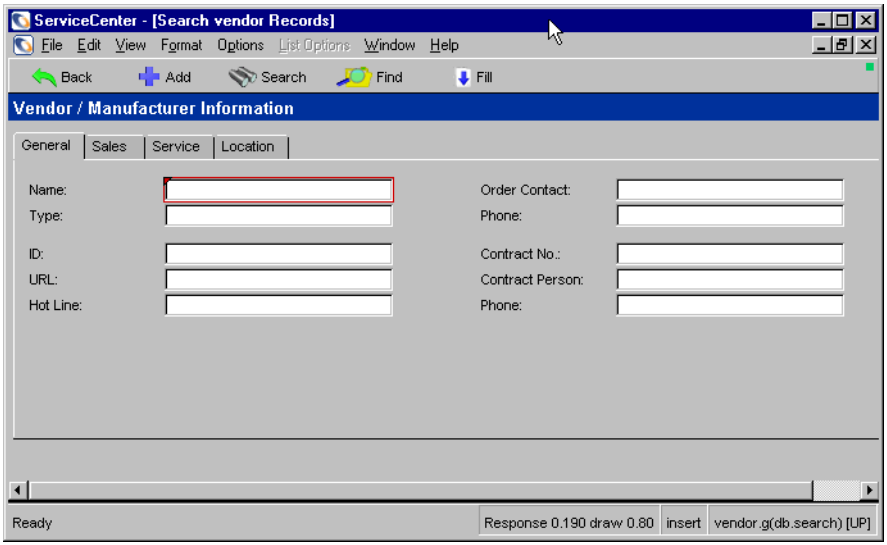

Figure 3-38: Vendor Details form

The contact and services information for that vendor appears on the *General, Sales, Service,* and *Location* tabs.

General tab

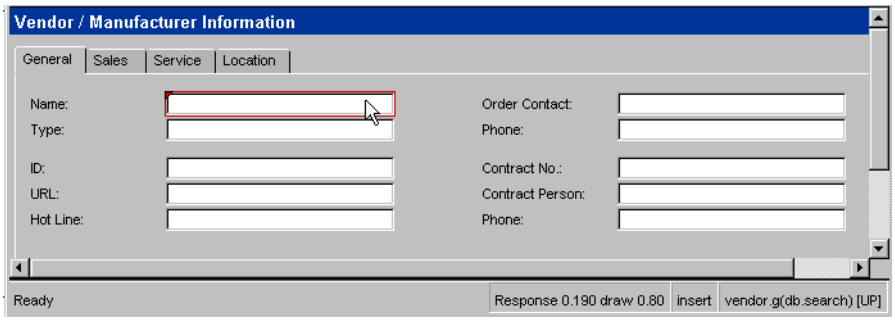

Figure 3-39: General tab

Use the following field descriptions to identify field values and contents

Field	Description
Name	Specify the vendor or manufacturer's name.
Type	Specify the type of vendor or manufacturer.
ID	Type the vendor or manufacturer's identification number.
URL	Type the web site address for the vendor or manufacturer, such as www.peregrine.com.
Hot Line	Type the vendor or manufacturer's customer support center telephone number.
Order Contact	Specify the name of the vendor or manufacturer order contact.
Phone	Type the vendor or manufacturer's contact telephone number.
Contract No.	Specify the contract number for this vendor or manufacturer.
Contract Person	Specify the vendor or manufacturer's contract administrator.
Phone	Type the vendor or manufacturer contract administrator's phone number.

Sales tab

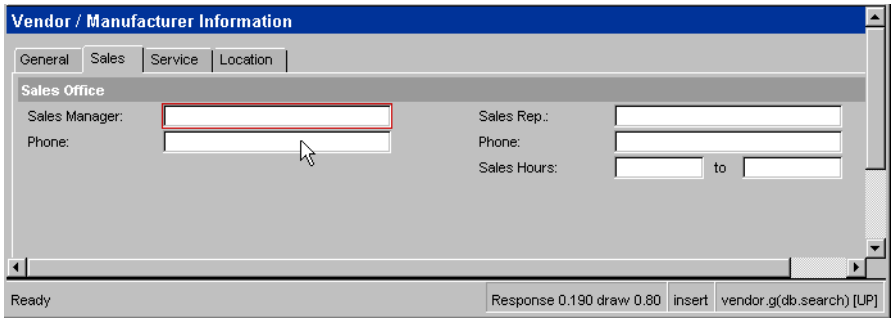

Figure 3-40: Sales tab

Use the following field descriptions to identify field values and contents

Field	Description
Sales Manager	Specify the sales manager's name.
Phone	Type the sales manager's telephone number.
Sales Rep	Specify the sales representative's name.
Phone	Type the sales representative's telephone number.
Sales Hours	Specify the hours when you can contact the sales representative.

Service tab

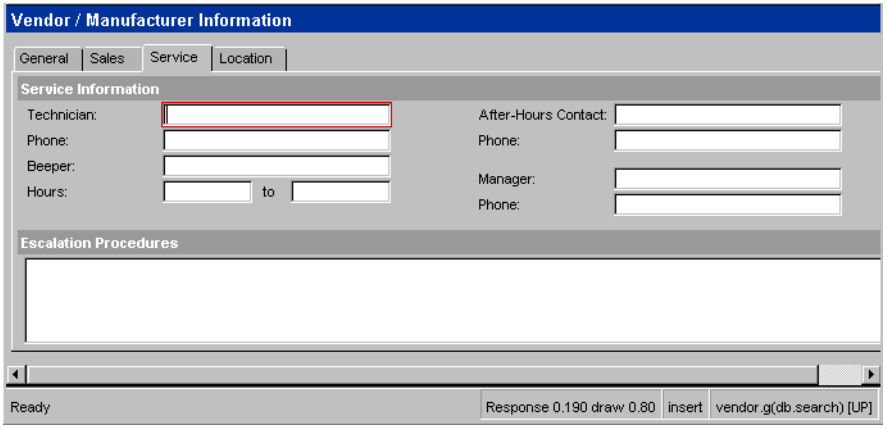

Figure 3-41: Service tab

Use the following field descriptions to identify field values and contents

Field	Description
Technician	Specify the service technician's name.
Phone	Type the service technician's telephone number.
Beeper	Type the service technician's pager number.
Hours	Specify the hours when you can contact the service technician.
After Hours Contact	Specify who is the appropriate contact for after-hours and emergency situations.
Phone	Type the after-hours and emergency contact's telephone number.
Manager	Specify the service manager's name.
Phone	Type the service manager's telephone number.
Escalation Procedures	Specify what steps to take if service or the response time is unsatisfactory.

Location tab

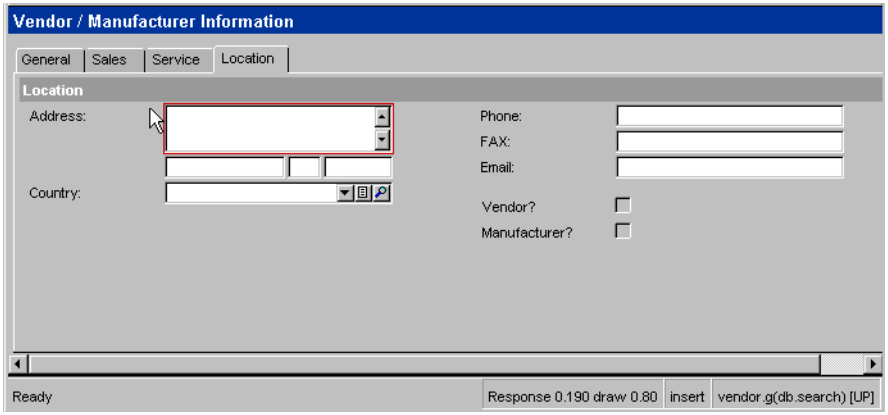

Figure 3-42: Location tab

Use the following field descriptions to identify field values and contents

Field	Description
Address	Type the vendor or manufacturer's address.
Country	Select a country from the drop-down list and click the adjacent magnifying glass icon to display the complete description of that country.
Phone	Type the vendor or manufacturer's telephone number.
FAX	Type the vendor or manufacturer's FAX number.
Email	Type the vendor or manufacturer's email address.
Vendor	Check this box if the supplier is a vendor.
Manufacturer	Check this box if the supplier is a manufacturer.

4 Approvals

CHAPTER

The approval process automates and formalizes the evaluation of quotes and orders by the appropriate management entities. This process channels the risk, cost, and responsibility associated with a request to the proper levels.

Read this chapter to learn more about Approvals:

Overview

An approval requirement is assigned when an item requires a decision-maker's evaluation. These approvals, though encompassing the line items and part numbers listed on the quote or order, operate only at the quotes and orders level. The status of individual line items may change (for example, from *requested* to *ordered)*, but it is only the quote or order itself that is approved or denied.

Those operators authorized to issue approvals within each area and category of requests and orders are listed in the group definition records. See *Security and Access* on page 29 for more information on operator and user profiles and group definitions.

Approval Sequence

Approvals can either be approved, retracted, or denied. *Pending* approvals are awaiting action. Approval groups are placed in sequences in the order that their approval is required. If groups have the same sequence number, their approvals can be made independent of each other.

When a *pending* approval is approved, its status becomes approved and the quote or order moves on to the next phase.

Approval Components

The Approval Status of a quote or order remains pending until appropriate approval actions have been taken. The following introduces the components of the approval process.

- *Approval Status*
- *Approval Files and Features*
- *Approval Actions*

Gen by items are those items which cause an approval to be required. These items include individual line items, part numbers, quotes, and orders.

Although all the record types listed as possible *Gen by item* can generate individual approval requirements, the approval requirements for the line items and part numbers are consolidated to the parent quote or order, the *Control item*. The line items and part numbers themselves are not approved, but the approvals are done for the control items for the line item or part number displayed. Figure 4-1 shows the approval work flow.

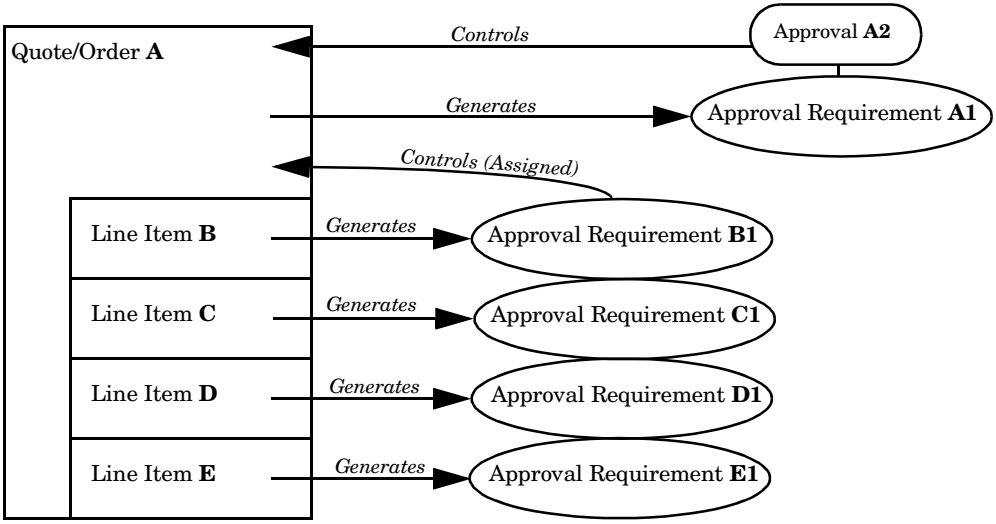

Figure 4-1: "Generated By" Control Flow

A series of line items B, C, D and E, for example, may each generate an approval requirement (four separate approval requirements— B1, C1, D1 and E1), thus making each technically a *Gen by item*. These approval requirements are then bundled and attached or assigned to the quote or order (*Control item*) for the line items displayed, which carries its own approval requirement (A1).

When an approval (A2) is given for the *Control item* approval requirement (A1), the approval is also given to each of the line item approval requirements (B1, C1, D1 and E1). One approval will approve the whole and all of its parts.

Approval Status

The Status of a quote or order is the current state of that record, whether it is waiting for its items to be ordered or received, but no approvals are required for the status to change. A unique status is given to each line item within the quote or order, as well as the quote or order as a whole. Some phases require approvals, as a phase change most often involves the intervention of a decision-maker, indicating the request or order needs to be moved on to another department or area's responsibility.

The approval status of a quote or order reflects the current condition of all subordinate approval requirements associated with the *Control item*. Request Management contains the following default approval statuses.

approved—all of the approval requirements have been approved.

denied—the approval requirements have been denied.

pending—active and waiting for an approval action.

Approval Files and Features

Two primary files contain approval information: the Approval Definitions (ApprovalDef) and the Approval Log (ApprovalLog).

Approval Definition—defines the approvals used by all phases (static file).

Approval Log —Current Approvals (lists current approval actions).

- Currently, an unlimited number of approval requirements can be defined for each item.
- Approvals may have conditions attached, such as Total Cost, Lead, Time requirements, and Impact.

Approval Actions

Approval groups have the following options when facing an approval requirement.

Approve gives authority to proceed with the item or scheduled work, or accept completed work. There are four pre-defined approval types:

- **All** means the record is approved when all members of the approving group issue an approval.
- **One must approve** means the record is approved with one approval from any member of the approving group.
- **Quorum** means the record is approved as soon as a majority of the approving group indicate approval.
- **All must approve - immediate denial** means that all approvers must approve the record. The first denial causes the status to change to Deny. All approvers do not need to register their approval action.

Deny means there is no authority to proceed with the item or scheduled work, or reject completed work.

- **All must approve - immediate denial** means that all approvers must approve the record. The first denial causes the status to change to Deny. All approvers do not need to register their approval action.

  Otherwise, the record is denied when all members of the approving group issue a denial.

Retract removes a previously approved or denied action. This resets the approval status to *pending*.

Using Approvals

Operator ServiceCenter user profiles will determine whether they see an Approve Requests button on the main system home menu after they log on. Users with the appropriate approval authority, such as MAX.MANAGER, will have access to the Approve Requests button.

Users with the appropriate approval authorities and privileges to the query and summary screens can access approvals from within Request Management.

To access approval process:

- If an Approve Requests button is displayed on the ServiceCenter main menu, select this button. (MAX.MANAGER login has the approval authority, therefore the Approve Requests button is displayed on the ServiceCenter home menu.)
- If this button is not displayed on the main menu:
  - Select **Request Management** on the Services tab.
  - Open a quote or order, or search existing quotes or orders.

See *Access from Quote and Order Search Forms* on page 128 for more information to continue through the process.

Access from Quote and Order Search Forms

In order to access Approvals from the Search screens, an operator's Request Management profile must meet the following requirements:

- The **Approvals** parameter for the current area (quote or order) must evaluate to *true*. See *Security and Access* on page 29 for more information.
- The **Approvals Group** field must contain at least one group for the current Area. See *Security and Access* on page 29 for more information.

Note: If a user does not have access rights to a particular area or to approval records, a message is displayed in the status bar indicating this.

To access Approvals from the Search screens:

1. Click **Request Management** on the ServiceCenter home menu.
2. From the Quotes or Orders tab, select **Search Quotes** or **Search Orders** respectively.
3. Click Search to pass a *true* query without entering any values in the form. A record list of quotes or orders appears. Select a record to view.

4 Figure 4-2 shows the Approvals tab.

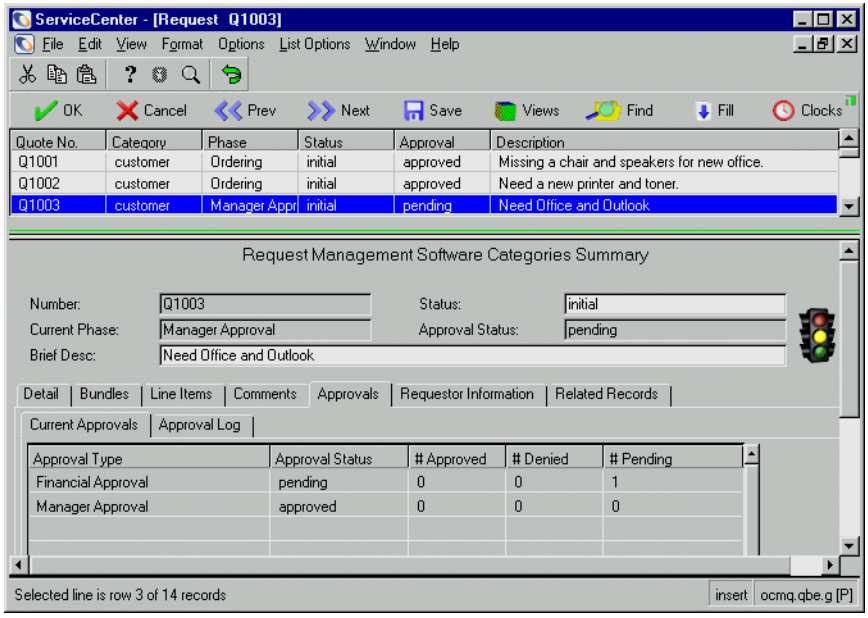

Figure 4-2: Accessing Quote Approvals

The Approvals tab consists of two sub-tabs, including *Current Approvals* and *Approval Log*. The following definitions identify the fields of the **ocmq.view.summary** form in the Current Approvals tab and Approval Log tab.

Current Approvals tab

See the Current Approvals tab shown in Figure 4-2.

Field	Description
Approval Type	Corresponds to the Approval Definition that defines the approval requirements for the record.
Approval Status	The Status of the approval requirement.
# Approved	Number of approvals issued.
# Denied	Number of denials issued.
# Pending	Number of requirements pending approval action.

Approval Log tab

Figure 4-3: Approval Log tab

Field	Description
Action	The action taken by the approver or approval group.
Approver/Operator	The approver, approval group, or operator.
By	The operator who performed the approval action.
Date/Time	The date of the approval action.
Phase	The current phase of the quote or order.

1 If the user has quotes authority in only one group, the record list of current requests appears, as shown in Figure 4-2 on page 129.

If the user has approval authority for multiple groups, the **Approval Group Select** dialog box shown in Figure 4-4 on page 131 appears. Select the groups that you want searched.

Request Management places a check mark beside the flagged group boxes and searches for requests currently awaiting approvals for that group. If all groups are checked, all groups are queried.

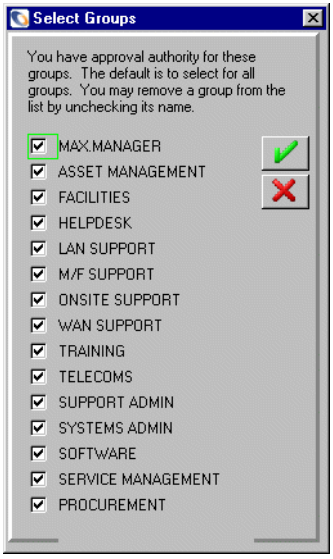

Figure 4-4: Approval Group Selection

2 Click **OK**. If only one request is found, that request is displayed. Otherwise, the list of current requests is displayed.

3 If the record list displays, click on the number of the request you want to view.

4 From the Request (in the Options menu), the user can select an individual quote and execute one of the following actions, based on the quote's current status.

Action	Description
Approve	Gives authority to proceed with all items in list.
Deny	Denies authority to proceed with all items in list.
Retract	Removes previous approval actions.

5 Click a quote number to access a quote for action.

6 Click **Options** > **Approval** > **Approve or Deny** to approve or deny the quote. Figure 4-5 shows the approval choices.

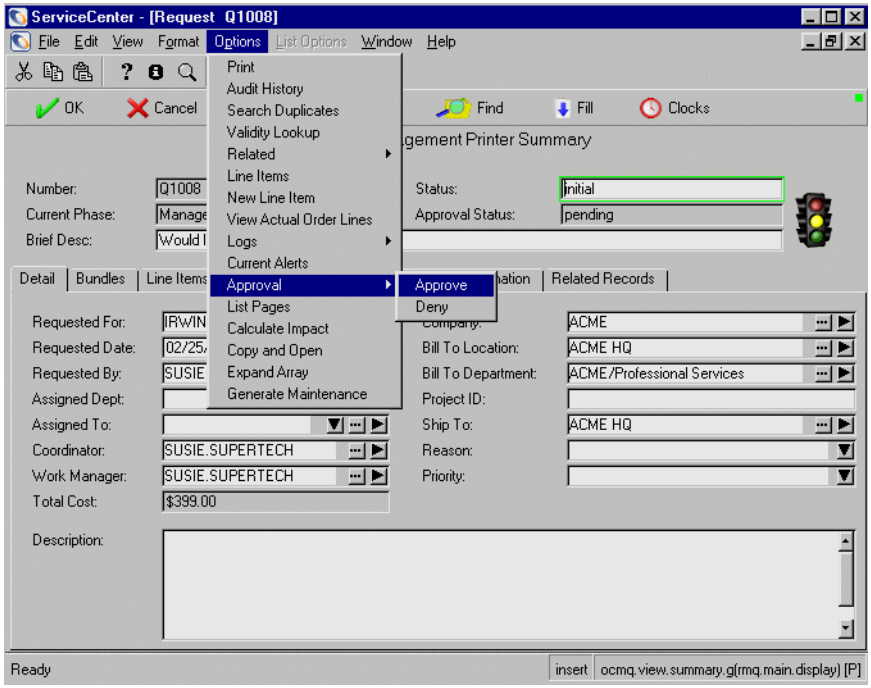

Figure 4-5: Quote Approval options

Approval Type Group Options

The Approval Type Group options are presented when you select and click on an Approval Type group. Select an Approval Type group option for currently pending approvals or future approvals.

Group Option	Description
Approve One | Deny One | Retract One	Ability to approve, deny, or retract a current or future approval for this Approval Type group.
Approve Current | Deny Current	Ability to approve or deny current approvals for this Approval Type group.
Approve All |Deny All | Retract All	Ability to approve all, deny all, or retract all approvals for this Approval Type group.

Approval Definitions

The Approval Definition is a static file that defines the approval groups and the approval conditions associated with a particular approval group, as well as their valid functional area.

An Approval Definition record defines the basics of an approval requirement. The approval condition for each requirement can be based on any field in the source record, such as cost, category, assignments, or priority.

Accessing Approval Definitions

1. Click **Request Management** on the ServiceCenter home menu.
2. Click **Supporting Files** in the Maintenance tab.
3. Click **Definitions** in the Approvals structure of the Support tab. A blank Approval Definition (*ApprovalDef*) form is opened.
4. Click **Search** to pass a *true* query and retrieve a list of all current Approval Definition records.
5. From the record list displayed, double-click an Approval Name to select an Approval definition. Figure 4-6 shows the selected Approval Definition record.

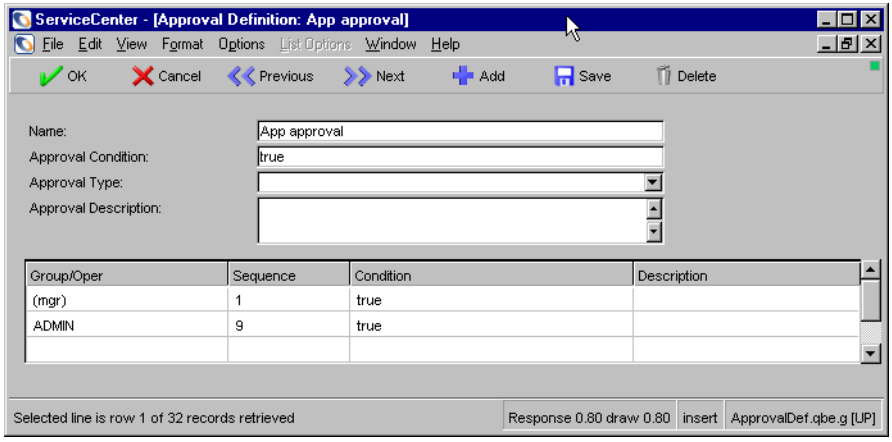

Figure 4-6: Approval Definition Records

This form displays the unique values for this approval definition record.

Field	Description
Name *(required)*	Unique name of the Approval definition record.
Approval Condition *(required)*	The condition that must evaluate to *true* before the approval requirement is made active. The default is *false*.
Approval Type	Type of approval required for this approval group definition. ■ **All must approve.** All members of the group must approve the request. ■ **One must approve.** Only one member must approve the request. ■ **Quorum.** A majority of the approval group must approve the request. ■ **All must approve - immediate denial.** All approvers must approve the record. The first denial causes the status to change to Deny. All approvers do not need to register their approval action.
Approval Description	A text description of the approval requirement.
Group/Oper	The list of operators or groups who can take action on this approval.
Sequence *(required)*	The order that this Approval Requirement is processed in relation to other requirements of the Quote/Order. The default is *0* (*zero*).
Condition	The condition that must evaluate to *true* before the approval requirement is made active. The default is *false*. **Note:** Any condition that references the current record will use the *$L.file* as the current file variable.
Description	A text description of the approval requirement.

Approval Log

The Approval Log lists all the approval actions performed for an approval request.

When a quote, order, or line item is opened, the system determines that item's approval requirements by searching *ApprovalDef* for those definitions that match what appears in the Phase definition (*ocmoptions*) for the item, or in the Catalog definition (*ocmco*). When the Approval log is run, all currently approved items are included in the list.

Accessing Approval Logs

You can access Approval Logs from the Request Management menu.

1. Click **Supporting Files** in the Maintenance tab.
2. Click **Approval Logs** in the Approvals structure of the Support tab.

   An empty Approval Log form (*ApprovalLog*) displays.
3. Click **Search** to pass a *true* query and retrieve a list of all current approved records.

4 Figure 4-7 shows the record list. Click the name of the record to open it and the selected record appears.

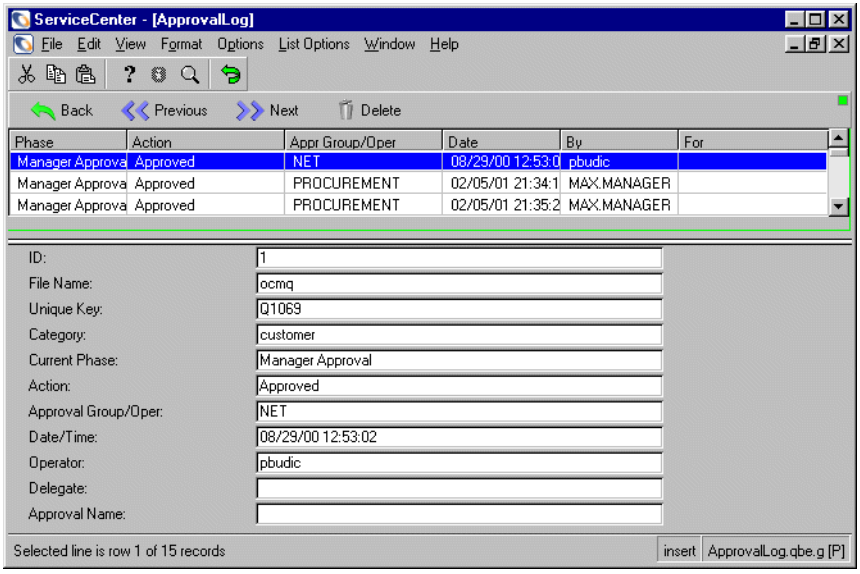

Figure 4-7: Approval Log Record List

The following fields define the unique values of this approval log:

Field	Description
ID	Unique identification number of this approved record.
File Name	Unique name of the Approval Group.
Unique Key	Unique key to this record.
Category	Category associated with this approval record.
Current Phase	Current phase of this approval record.
Action	Last action taken against the approval requirement: *approved, denied, or retracted.*
Approval Group/Oper	ID of the operator who last modified the record.
Date/Time	Date and time of the approval.
Operator	Operator or Approval Group that performed the approval action.

Field	Description
Delegate	Designated Approver or Approval Group.
Approval Name	Name of the Approval definition.

From a Request Management Record

When using this method to access the Approval Log records, different formats are displayed under different conditions. The **Approval Log** option in the **Options** menu of the Quote or Order Summary screen opens the appropriate Approval Log form and record.

1 From the Request Management Quotes tab, click **Search Quotes**.

2 Pass a *true* query by clicking **Search** without entering any data in the form. This displays a list of all current quotes.

3 Locate the number of the quote you wish to view, and click to display the quote. Figure 4-8 shows the quote details.

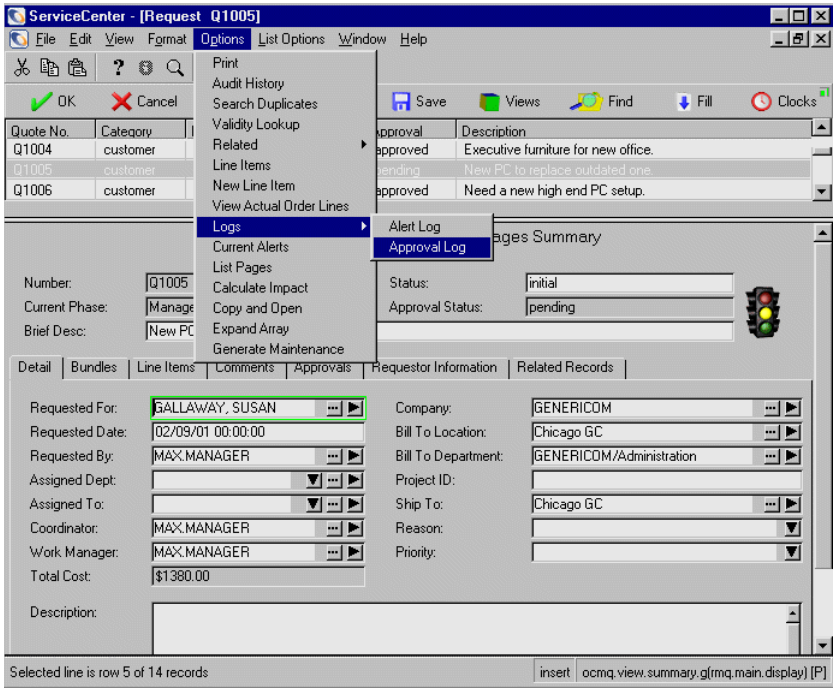

Figure 4-8: Request Management Quote Summary form

4 Pull down the **Options** menu.

5 Select **Logs** > **Approval Log**. If an Approval Log record (*ApprovalLog*) exists for this quote, it is displayed.

Approval Groups

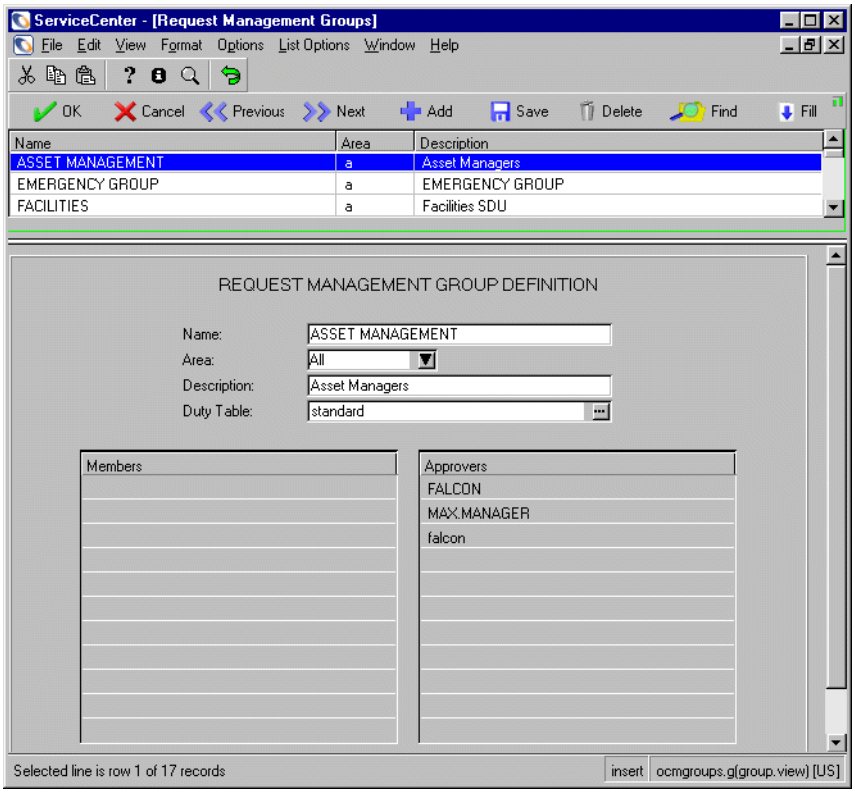

Figure 4-9: Approval Group Definition

For directions on how to access the Groups form and definitions of the form fields, see *Viewing Group Records* on page 57.

The Approvers array of the Group Definition form displays the list of operators who issue approvals for that group. In addition, they can be designated to receive messages about system events, involving quotes, orders, or line items.

Membership in this group is specified by the Members array values. Those operators specified in this array can also receive messages when quotes, orders, and line items are entered into the system.

To add a name to an array, update the operator record to use a request profile that specifies the group is an approval group.

Events/Messages

Messages can be sent to operators when an event occurs in the system. Examples of events include opening a quote (request), approval of a request, opening a line item, and closing a phase.

Event records are defined in the *ocmevents* file. These records indicate what message will be sent as a result of the specified action. See *Alerts, Events, and Messages* on page 143 for more information on events and messages.

Setting Up Approvals

Setting up approval authorities and requirements involves the components explained earlier in the chapter; several Security and Access elements, described in *Security and Access* on page 29; and several Phase definitions and Catalog features, described in *Catalog Operations* on page 61.

- In order for operators to have approval authority in Request Management, their operator records must reflect access capability for the functional areas of Request Management (for example, Capability Words in the operator record must indicate Request Management access, such as SysAdmin, OCMAdmin, OCMO). Setting this up is explained in *Security and Access* on page 29.
- Within Request Management, the user must be included in the membership of a designated approval group, in the *ocmgroups* file. See *Approval Groups* on page 138.

- The user's authority within Request Management must be defined in the designated Request Management profile, *ocmprofile* record, specified in the operator record. This includes:
  - A list of the approval groups for which the user(s) of this profile can approve.
  - Approval capabilities defined on the various check box tabs of the *ocmprofile* form. Setting this up is explained in *Security and Access* on page 29.
- The approval groups for which this user has approval authority must be included in the definition of the approval that is required for the request or order.
- Approval requirements are defined on the Phase definition Control tab (*ocmoptions*) or Catalog part record Control tab.
- Approval Definition, *ApprovalDef*, records must be defined according to the Phase definition approval group requirements, which means an approval definition record must exist for any group defined as the approval group of a particular Phase definition. See *Approval Definitions* on page 133.

External Event Operations

You can use the method described in the *ServiceCenter Automate for Windows NT and Unix Guide* to send events via email. However, as defined below, the event can be configured as an open, approval, denial, or any of the other accepted events in the system. Use the method described in the above guide for manipulating the data and placing it in the *eventin* table.

ServiceCenter applications have been set up to support incoming events for Request Management. The supported events are as follows:

- **rmqin** - Supports Open, Update, and Close-phase of Quotes
- **rmlin** - Supports Open, Update, and Close-phase of Line Items
- **rmoin** - Supports Open, Update, and Close-phase of Orders

With the above events, it is expected that the event will include the following initial data elements:

```
number^operator^action
```

Where *number* is the item to work on, *operator* is who to work as, and *action* is what to do (open/update/close).

- **approval** - Supports Approval actions on Quotes (Approve, Deny, and Retract).

The following initial data elements will be included in the event listed above:

area^number^group^action^date^operator^comments

Where *area* is quote (*ocmq*), order (*ocmo*), or line (*ocml*); *number* is the item to work on; *group* is the Approval group; *action* is what to do (approve/deny/retract); *date* is date of the transaction; *operator* is who to work as; and *comments* is any extra information, such as for billing or shipping.

CHAPTER 5 Alerts, Events, and Messages

Events are system occurrences, triggered by user activity or certain conditions, that require additional user action. Examples of events in Request Management include *open, update, close,* and *approval* (of quotes).

This chapter describes how to set up and manage standard and special events, such as messages and alerts, in Request Management.

Read this chapter for information about:

Overview

Events in Request Management can spawn messages to designated parties (operators or groups) within the system. For example, messages can indicate if a quote (request) has been opened, and set into action the need for a user to provide additional interaction, namely providing an approval for the quote.

In the event a certain time limit set for accomplishing an approval is not met, an alert is triggered. An alert is an optional timed-delayed event, which triggers another event to send out a message.

As soon as a request is approved, that action constitutes an event. A message is sent by that event indicating the state of the request.

In this way, events, alerts, and messages build the communication chain, notifying users of pending quotes and orders and the status of requested items throughout their life cycles.

Note: Setting up alerts, events, messages, and approvals requires the operation of the *ocm* background scheduler. The scheduler must be included in the system start-up schedule record. See *Background Processing* on page 166 and *Generating Orders* on page 172 for help in setting up these processes.

Alerts

Quotes, orders, and line items progress in phases according to a predefined schedule. Alerts monitor the progress of these phases and take action when circumstances warrant an automated response, such as when the progression is delayed. For example, the *late notice* alert notifies a designated management group that a quote line item(s) is overdue for approval, and updates the alert status to include *late notice*.

The user can define any number of standard or customized alerts for any phase, control who is notified for each alert, and control the naming convention used for the alert itself.

Alerts support several functions within the system:

Alert Messaging—alerts trigger events. The event manager generates messages to certain designated recipients as a result of an alert, which update the original request.

Batch Scheduling—all alerts associated with a phase are scheduled at once when the phase opens.

To access Phase Definition Alert controls:

1 Click **Request Management** on the ServiceCenter home menu.

2 From either the Quotes, Line Items, or Orders tab, select **Quote Phases**, **Line Item Phases**, or **Order Phases**.

3 Click **Search** to perform a *true* query without entering any values in the blank *ocmoptions* form. A record list of alert records is displayed. Make your selection by clicking on a phase name.

4 Select the Alerts tab.

Figure 5-1 shows the Phase Definition Alert controls.

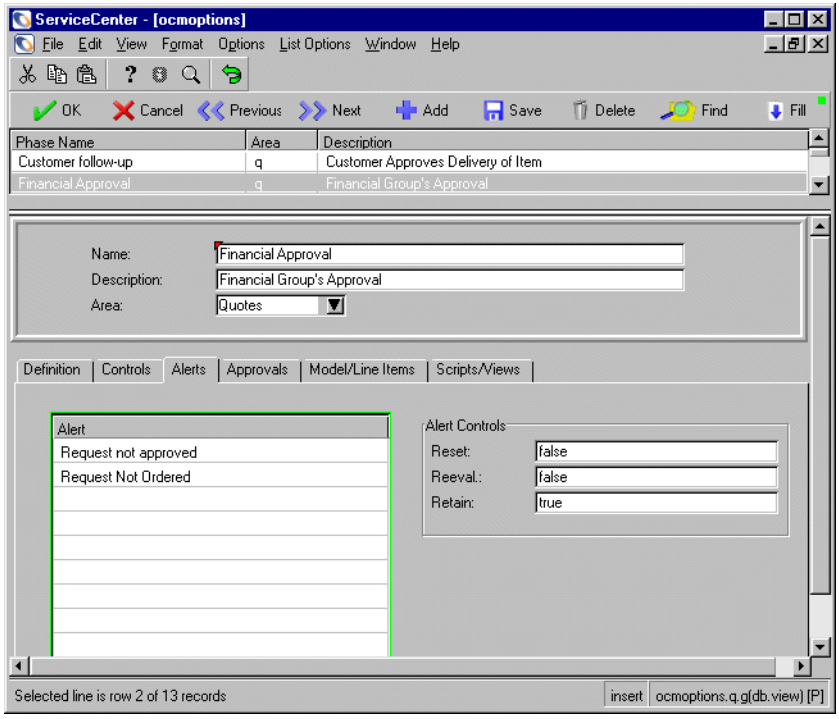

Figure 5-1: Phase Definition Alert Controls

Certain alert controls are specified on the Phase (ocmoptions) record.

Alert Controls on the Phase record form include:

Reset—sets the status of all current *Alert records* associated with the current quote or order to *inactive* and marks the last action field as *reset*. Then, it schedules a calculate alert record to recalculate the item's alerts and restart the alerts process.

Reeval—retrieves each *Alert* associated with the quote or order and performs the following processing:

- If current alert status is *active*, the alert condition is reevaluated and the alert is updated to reflect the correct status; processing ends.
- If current status is not *active*, the **Schedule Condition** field is reevaluated. If this evaluates to *true*, the following fields are updated:
- **Status** is set to *scheduled*.
- **Last Action** is set to *recalc*.
- **Action Time** is set to current date/time.
- **Schedule Condition** is reevaluated. If *true*, **Alert Time** is recalculated and **Status** updated to *scheduled*. If *false*, **Status** is set to *not required*.

Retain—determines whether alert log records should be held in the *ocmalertlog* file after the associated item (quote, order, line item) has been closed.

Alert Processing

There are two primary files used in alert processing:

- **Alert Definition** (AlertDef)—defines the alerts used by all phases (static file).
- **Current Alerts** (Alerts)—tracks the alerts created for each phase (active alert file).

Alert Definitions

The Alert Definition is a static file, which defines the basic alert information for each named alert and all general alert definitions.

To access the Alert Definition File:

1 Click **Request Management** on the ServiceCenter home menu.

2 Select **Supporting Files** in the Maintenance tab.

3 From the Request Management Support tab, select **Definitions** in the Alerts structure.

An empty Alert Definition form (*AlertDef*) is opened.

4 Click **Search** to pass a *true* query and display a list of all current Alert Definition records.

5 Select a record to view from the list by clicking on the alert name. Figure 5-2 shows the selected record.

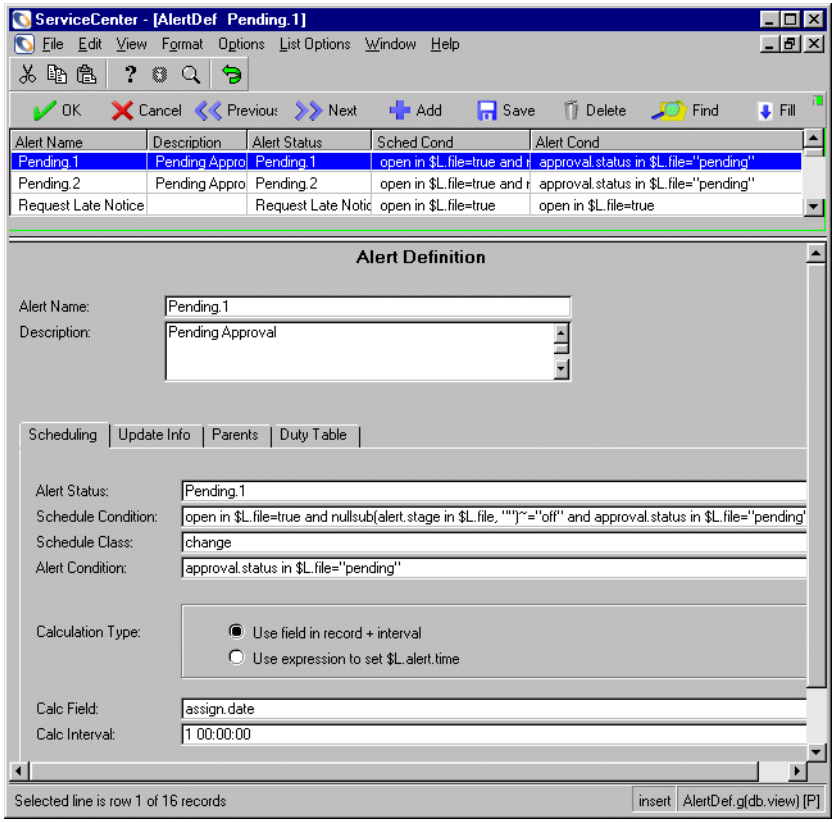

Figure 5-2: Alert Definition Record List with first record displayed

The following field definitions identify the type of data needed for the record:

Field	Description
Alert Name *(required)*	Unique name of the Alert.
Description	A text description of the Alert Condition.

Scheduling tab

See the Scheduling tab shown in Figure 5-2 on page 147.

Field	Description
Alert Status	Status of the alert. Current file referenced by *$L.file*.
Schedule Condition	Condition that determines if the Alert is scheduled. The default is *false*.
Schedule Class	Classification of the scheduled Alert.
Alert Condition	*(required)* Condition that must evaluate to *true* before the alert is set. If evaluations are *false*, the alert goes away. The default is *false*.
Calculation Type	Calculation method used for setting alert conditions. Use one of the following: ■ Use field in record + interval **Calc Field**—name of the date/time field in the quote or order that the interval field value is added to in order to determine the alert time. (Request Management uses the current date/time to apply the alert interval if this field is null in the quote or order data record.) **Calc Interval**—*(required)* relative interval of time that is added to the Calc Field time to determine the alert time. Can be positive or negative time intervals. ■ Use expression to set $L.alert.time **Calc Expression**—text expressions parsed into a message and presented at alert time.

Update Info tab

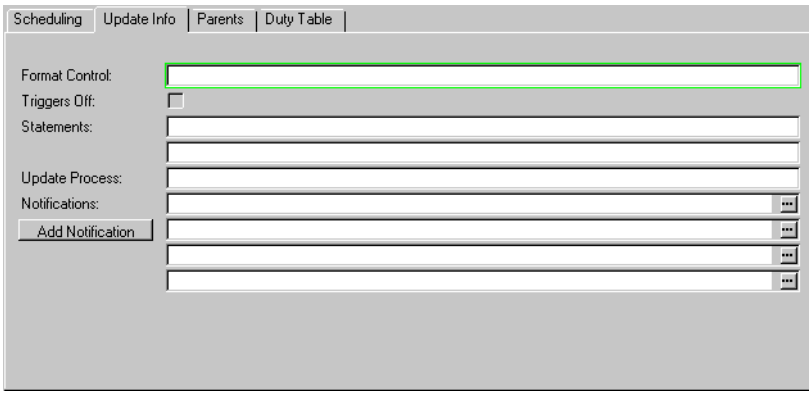

Figure 5-3: Update Info tab

Field	Description
Format Control	Name of the Format Control record to be processed in addition to the regular alert processing, when the Alert Condition field evaluates to *true*.
Triggers Off	Always set to *false* (unchecked). *DO NOT* change this setting.
Statements	Processing statements executed in addition to the regular alert processing, when the Alert Condition field evaluates to *true*.
Update Process	Update process to be used when setting up alerts.
Notifications	Notification process to be used when alerts are processed. See *Notifications* on page 168 for an introduction to notifications. See the *ServiceCenter System Tailoring Guide, Notifications* for details about accessing, adding, editing, and so forth.

Parents tab

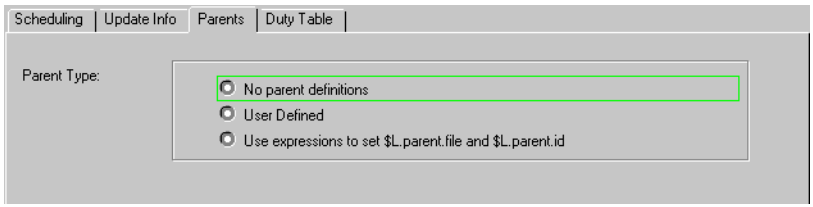

Figure 5-4: Parents tab

Important: *Do not* make any changes to the definitions in this tab.

Parent Type Area

The parent type that is defined and reflected in the alert status phase.

Field	Description
No parent definitions	No parent definitions to be defined.
User Defined	■ **Parent File**—unique name of the Parent file. ■ **Parent Id**—unique identification number of the parent part.
Use expressions to set $L.parent.file and $L.parent.id	■ **Expressions**—enter the expressions to set the *$L.parent.file* and *$L.parent.id*.

Duty Table tab

The Duty Table is the work table that is used to calculate alert times. When scheduling alerts, the Alert processor determines which shifts are valid for sending alerts.

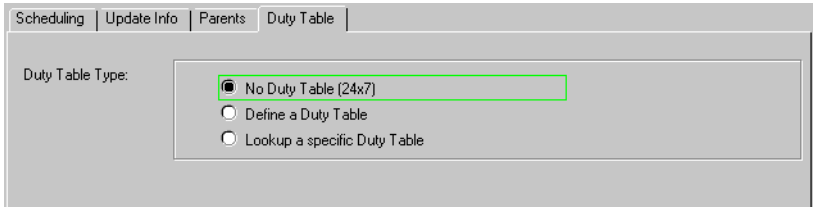

Figure 5-5: Duty Table tab

Duty Table Type Area

Field	Description
No Duty Table (24x7)	Duty Table not defined. Use standard 24x7 clock and calendar.
Define a Duty Table	Create a new table.
Duty Table	User defined Duty Table. Customized to set your office group's working hours.
Lookup a Specific Duty Table	Allows standard validity Table Look-Up processing so that the Alert processor can determine valid shifts, based on an existing Duty Table.
Group Lookup Name	Allows standard validity Table Look-Up by name, so that you can use another Duty Table in the Table Lookup file.
Group Lookup File	Allows standard validity Table Look-Up by file, so that you can use another Duty Table in the Table Lookup file.
Group Lookup Field	Allows standard validity Table Look-Up by field.
Duty Table Field	Uses the definition in the Duty Table field.

Alert Log

The Alert log is a file that lists currently scheduled and active alerts.

To access the Alert Log file:

1. Click **Request Management** in the ServiceCenter home menu.
2. Click **Supporting files** in the Maintenance tab.
3. From the Request Management Support tab, select **Alert Logs** in the Alerts structure.

   An empty Alert Log form (*Alertlog*) displays.
4. Click **Search** to retrieve a list of all current Alert Log records. Then click on a record in the list.

Figure 5-6 shows the selected Alert Log record.

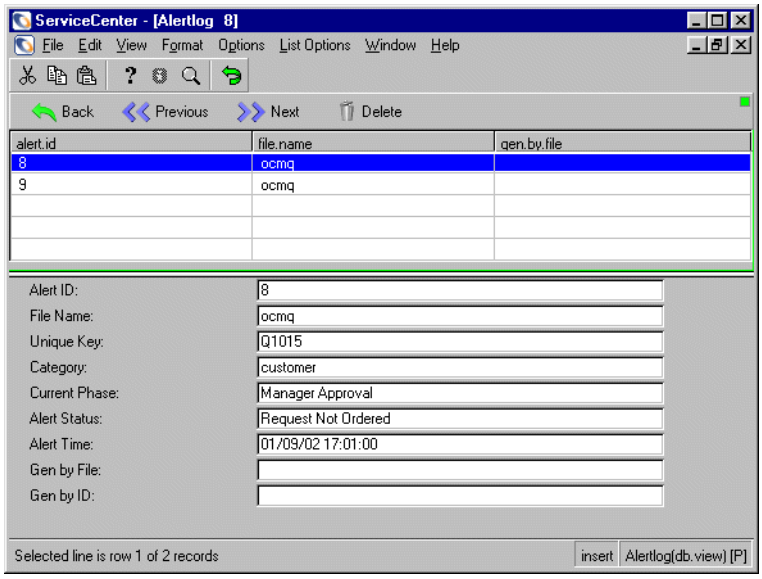

Figure 5-6: Selected record in the Alert Log

The following descriptions identify the data contained in each field:

Field	Description
Alert ID	Unique identification number of this alert.
File Name	Name of the alert file.
Unique Key	Unique key to this record.
Category	The category associated with this alert.
Current Phase	Current phase of this alert.
Alert Status	Status of the alert. Current file referenced by *$L.file*.
Alert Time	The date/time the alert condition evaluated to *true*.
Gen by File	*Gen by file* items are those items which cause an alert to be required, including individual line items, part numbers, quotes, and orders.
Gen by ID	*Gen by ID* items are those items which cause an alert to be required, including individual line items, part numbers, quotes, and orders.

Accessing the Alert Log When Viewing a Quote, Line Item, or Order Record

1. Click **Request Management** on the Services tab of the ServiceCenter home menu.
2. From the Quotes, Line Items, or Orders tab, click **Quote Queue**, **Line Item Queue**, or **Order Queue**, respectively.
3. Click **Search** in the *sc.manage.ocmq*, *sc.manage.ocml*, or *sc.manage.ocmo* form respectively.
4. Click **Search** again in the *ocmq.search*, *ocml.search*, or *ocmo.search* form respectively to perform a *true* query and retrieve a list of all current records.
5. Select a record to view by double-clicking on the number.

   For this example the Quote queue is accessed, so the record displays in the *ocmq.view.summary* form.

   Note: A QBE list is displayed with the first record only if the Record List option in the View menu is selected. Otherwise you make your selection from the QBE list and select a record to display that record. In this example, the Record List option is checked in the View menu.

6. Pull down the **Options** menu.
7. Select **Alert Log,** as shown in Figure 5-7 on page 154.
8. If an alert record has not been defined for this quote or order, you are prompted to select an alert for the record.

9 Click **Back** to back out and return to the queue.

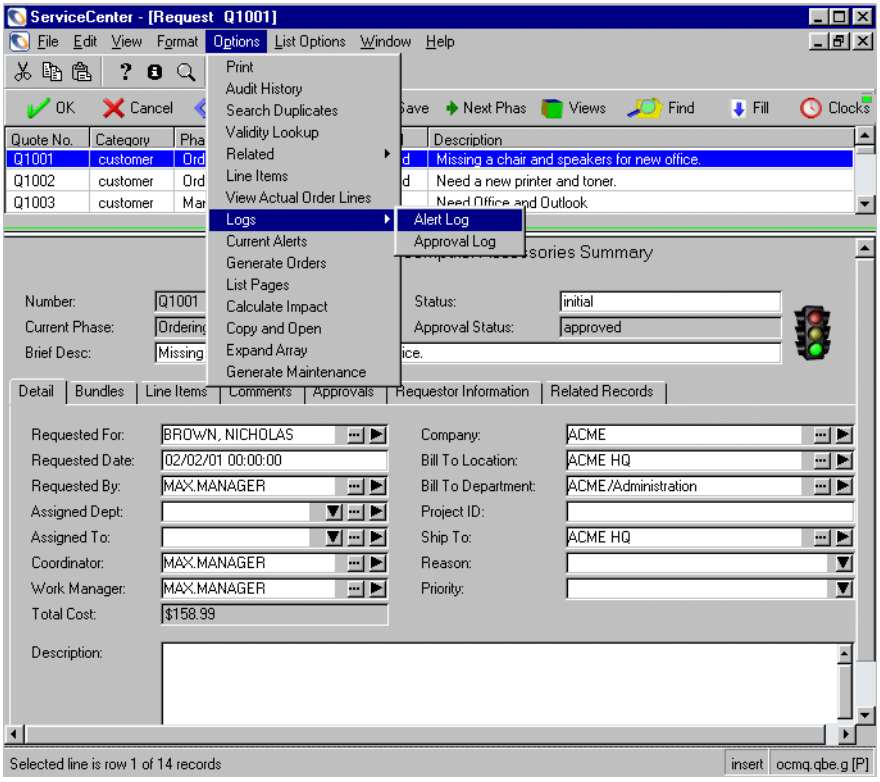

Figure 5-7: Selecting the Alert Log Option

Events

Events are system occurrences triggered by the creation or update of quotes, orders, and line items, such as opening a quote, approving a quote, or changing the dollar amount of an order. Events can be used to trigger special processing, such as alerts and messages. When these specific activities occur, Request Management sends mail messages to users, as part of the default processing. Other customized routines can be executed for particular events.

Several default events are included with Request Management. Others may be added, according to your business needs (for example, activities or conditions that need to be checked or unique events warranting notification).

When an Alert Condition evaluates to *true*, Request Management treats it as an event, and notifications can then be sent for this alert condition.

Event Controls

- The option to schedule events is on the quote, order, and line item environment records (*environment.ocmq, .ocmo, or .ocml)*. See *Environment Access* on page 33 for details on how to access the environment records.

  The Schedule Events? field in the Quote Options structure (Figure 2-3 on page 33) sets when events are processed for categories and phases.

  - If this check box is unchecked (*false)*, events are not scheduled for processing or recorded in the message log, msglog file.
  - If this check box is checked (*true*), and Messages/Events? in the phase record (ocmoptions) is *false*, the event is scheduled and recorded in the msglog, but no other processing occurs.

- The option for processing messages and events is located on the quote, order, and line item Phase definition (ocmoptions) record. See *Phases* on page 75 for details on how to access and create phase definitions.

  The Messages/Events field in the Controls tab (see Figure 3-9 on page 79) sets the controls that define when events are processed for the particular phases named.

- All event names must be defined in the ocmevents file, or no event processing can occur (see *Request Management Events (ocmevents) File* on page 155).
- Events are processed when the phase of the quote, order, or line item is defined in the Phases field of the ocmevents file. If the Phase field is NULL on the ocmevents record, the event is processed for all phases.
- The Exec Cond option in the ocmevents record controls -- at the event level -- when an event is processed.

Request Management Events (ocmevents) File

This file contains the names and definitions of all valid Request Management events.

To access the event definition form:

1. Click **Request Management** on the Services tab of the ServiceCenter home menu.
2. Click **Supporting Files** on the Maintenance tab.
3. From the Requests Management Support tab, click **Events** in the Support structure.

   A blank events definition form (*ocmevents*) is displayed.
4. Click **Search** to perform a *true* query and display the record list of all currently defined events.
5. Select a record to view by clicking on the name of the event. Figure 5-8 shows the selected event record.

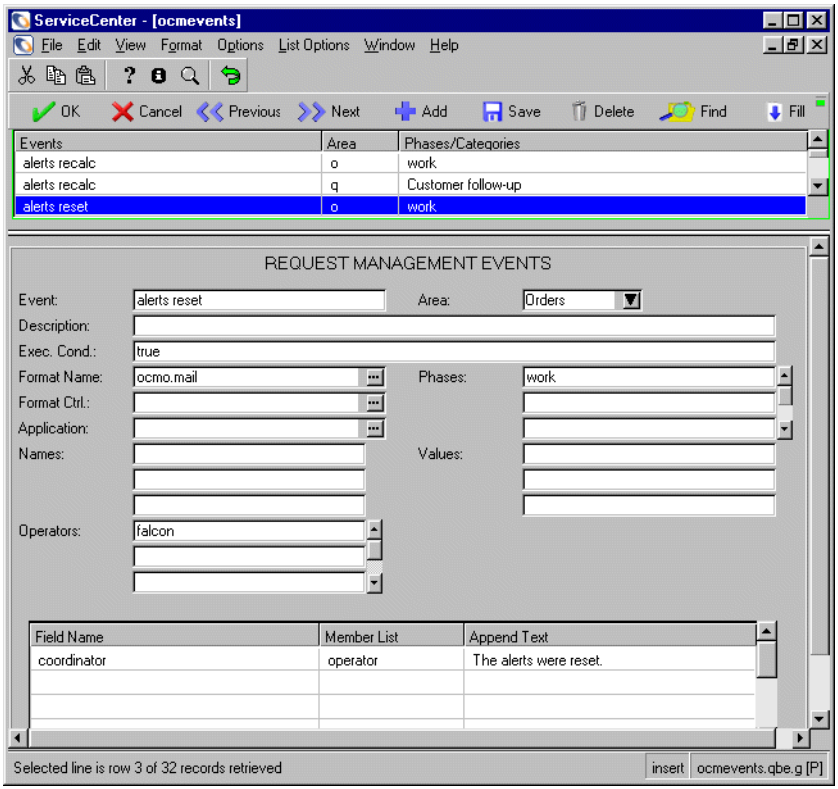

Figure 5-8: Accessing the ocmevents File

The following information describes the field definitions in the record:

Field	Description
Event *(required)*	Name of the event. Must be unique within each area; quote, order, or line item.
Area *(required)*	The Request Management area for this event: Quotes, Orders, Line Items, or All.
Description	Brief description of the event.
Exec Cond	Conditional field that defines the processing condition for this event, which is processed only when this condition evaluates to *true*. The default is *false*. (The condition for the *gen order delayed* event, however, should always be *true*.)
Format Name	Name of the form used to build the message sent to the users. Allows basic information about the record associated with the event to be included in the message; otherwise, the standard message is sent.
Format Ctrl	Name of the Format Control record executed against the particular quote, order, or line item data record when the event is processed.
Application	Name of the RAD application executed when this event is processed. If both Format Ctrl and Application contain values, the Application field takes priority.
Names	Names passed to the RAD application when the event is processed. See the *ServiceCenter System Tailoring Guide* for detailed information.
Values	Values passed to the RAD application when the event is processed. See the *ServiceCenter System Tailoring Guide* for detailed information.
Phases (quote/order/line item)	Control over which events are valid for which phases within each area. If this field is *NULL*, the event is valid for all phases of the area. (The event *gen order delayed* is not affected.)
Operators	Login IDs (names) of those operators who should receive a copy of the messages sent via this event.
Field Name	Input field names from the *ocmq, ocmo,* or *ocml* files containing either group names, or operator IDs or Full Names (depending on the option specified in the Environment record).

Field	Description
Member List	An indication of which list of operators in the **ocmgroups** file should receive mail notification. Valid values include: ■ *member*—each operator in the ocmgroups Members array will receive mail notification ■ *approver*—each operator in the ocmgroups Approvers array will receive mail notification ■ *all*—operators in both arrays will receive mail notification ■ *operator*—this choice is only used if you intend to put an individual user ID in the field name.
Append Text	The character string added to the generic message that is sent as the first line of the message. The message syntax is: *Notice: <type> <number > Phase: <phase name> <append.text> <date>*

Event Names and Definitions

Request Management includes several predefined system events. You can define additional events as needed. The following partial QBE list shows some of the most commonly used predefined system events, and to which Request Management areas they apply.

Commonly Used Predefined System Events

The following table describes predefined system events.

Events	Area
alerts recalc	o (orders)
alerts recalc	q (quotes)
alerts reset	o
alerts reset	q
approval	o
approval	q
approval reeval	o
approval reeval	q
approval reset	o

Events	Area
approval reset	q
approved	o
approved	q
close - category change	o
close - category change	q
close - partial received	l (line items)

Default List of System Event Names and Definitions

The following is the default list of system event names and definitions. (Some apply to certain areas, and others apply to all areas.)

Event Name	Description
alerts recalc	The quote/order's alerts have been recalculated.
alerts reset	The quote/order's alerts have been reset.
approval	An operator has approved one of the approval requirements of an item.
approval reeval	The approval requirements of a quote/order have been reevaluated.
approval reset	The approval requirements of a quote/order have been reset.
approved	All approval requirements for an item have been approved.
close - category change	The category of a quote/order has been manually changed.
close - partially received	A line item has been closed, but not all of the ordered quantities have been received.
close - phase change	The phase of an item has been closed due to a manual phase change.
close -- received	A line item has been fully received; or, all of the line items of an order have been fully received.
close final	The final phase of an item is complete. The item is closed.
close phase	An intermediary phase of an item is complete, but the item is still open.

Event Name	Description
copy&open	An item (quote, order, or line item) has been copied to a new item.
denial	One of an item's approval requirements has been denied.
denied	The quote/order is denied based on the Approval Status rules.
drop avail	A line item has been manually dropped from the *available to order* status.
due date notice	This contains sample system data.
gen order delayed	The background generate orders process has been delayed due to a posting process that has not yet completed. The generate orders schedule record has been updated to run at its next normally scheduled time.
late notice	This contains sample system data.
mark avail	A line item has been made available for order processing.
open	An item has been opened.
open next	The next phase of an item has been opened.
open next-category change	A new phase has been started due to a manual category change.
open next-phase change	The next phase has been started due to a manual phase change.
pending vendor - select	A line item is pending the selection/assignment of a vendor and cannot be processed until the vendor is assigned.
post bg - error	The line item that was targeted for posting could not be found.
post bg - excessive resched	A background posting schedule record has been rescheduled more than three times.
post bg - process error	During background posting of line item data, an unknown processing error occurred.
post bg - quote not found	During background posting, the parent quote could not be found; no data was posted.
post bg - rescheduled	The parent quote/order could not be locked.
posting not complete	When quantity > 0, and Received + BO'd + Cancel + Returned = 0 (the fields on ocml.receive.post format)

Event Name	Description
reeval	For approvals or alerts.
reopen	A closed item has been reopened.
reset	For approvals and alerts.
shortage	The OCM Order Create background processor attempted to process a quote line item; there is insufficient available inventory to satisfy the requirement of the line item. There are no open orders for this Part.
sap order pricing	SAP associates and verifies prices for individual items to be ordered
sap purchase req	SAP processed ServiceCenter request and queries for items available to order
sap quote pricing	SAP associates prices with items that are displayed on the ServiceCenter quote.
unapproval	An operator has retracted one of the approval requirements of an item.
update	An item has been updated.
waiting	The OCM Order Create background processor attempted to process a quote line item; there is insufficient available inventory, but there is already an outstanding order for the Part. Waiting on receipt of item.

Defining Additional Events

A new event can be defined and called by Format Control calculations, in the case that a specific condition must be checked for the event to occur at specialized times.

The syntax generally used to check for an event is as follows:

```
(x=o, q, or l): if (condition=true) then ($ocmx.events.pntr in $ocmx.events="event name";$ocmx.events.pntr+=1)
```

- The variable *$ocmx.events* (where x = the area *q*, *o*, or *l*) is an array of character strings used to track the events that occur during a particular phase of processing.
- The variable *$ocmx.events.pntr* is a pointer to the next array element that can be used to record an event name.

Important: Once an event has been added to the array, it is important to increment the pointer by *1* (one). If this does not happen, the event previously recorded will be overwritten.

The event that is scheduled if the condition is *true* must be defined in the ocmevents file.

Adding New Events

The following steps are required for adding new events to the system:

1. Activate the OCM Processor (ocm), see *Background Processing* on page 166 for more details.
2. Set the environment record **Schedule Events?** option for the area to *true*. See *Environment Access* on page 33 for more details.
3. Define the **Messages/Events** option for the phase. See *Phases* on page 75 for more information.
4. Set any RAD or Format Control definition to track a custom event. See the *ServiceCenter System Tailoring Guide, Format Control* to learn more about the Format Control options. See *Event Controls* on page 155 for more information.
5. Define the operator groups in the ocmevents record in the ocmgroups file.
6. Define the appropriate operator records.
7. Define the event in the ocmevents file.
   a. Define the **Exec Cond**.
   b. Define the **Format Name** in the *format* file.
   c. Define any **Format Ctrl** in the formatctrl file.
   d. Set any **Application** to a valid RAD routine with valid parameter names and values.
   e. Define the field names in the Area database dictionary file. See the *ServiceCenter System Tailoring Guide* to learn more about the Database Dictionary.
   f. Validate the member list.

For more information on Format Control operations and customization options, see *Format Control* in the *ServiceCenter System Tailoring Guide*.

Messages

Messages are sent in response to an event. They can be directed to specific operators listed in the *event* record and contain values from certain fields in quote, order, and line item records, which cause the initial event.

Request Management message processing involves:

- The background processor looking at the ocmoptions record for the phase or category that generated the event. If the record does not exist, processing ends.
- Evaluation of the Messages/Events option in the ocmoptions record. If false, processing ends.
- Checking for Field Name and Operators in the ocmevents record. If none, processing ends (unless this event is gen order delayed).
- Recording in the msglog the generic message (from the ocmevents record's Append Text field).
- Sending the standard message and the mail message to the operators defined in the Operators field of the ocmevents record.
- Sending a message to the operators defined in those fields referenced by the Field Name field of the ocmevents record.

The content of these fields is first assumed to be a group. If this group name is found in the ocmgroups file, then either the Members or Approvers (depending on the Member List field) of that group are added to a working list.

If this group name does not exist, the system searches the operator file; and if an operator record is found, it is added to the working list.

- Checking the working list for operators, and sending the message.

Message Classes

ServiceCenter has several default message classes where a user can define additional messages to display in Request Management.

To display the list of available classes:

1. Click **Administration** on the Utilities tab of the ServiceCenter home menu.
2. Select the Notifications tab in the Administration menu.

   The Message Classes structure contains the buttons for the various message classes. The buttons displayed are: On-Screen (msg), Print (print), Log (log), TSO (TSO), External E-Mail (email) and Internal E-Mail (email). These represent the possible action types for message classes.

Message Class Button	Description
On Screen	Send a message to the user's screen.
Print	Send a copy of the message to the receiver's default printer.
Log	Send a copy of the message to the msglog file.
TSO	Send a copy of the message to the receiver's TSO ID.
External E-Mail	Send a copy of the message to the receiver's e-mail address as specified in the operator or contacts record.
Internal E-Mail	Send a copy of the message to the receiver's internal ServiceCenter mailbox.

A message class record may be entered into multiple message class types.

Viewing a Message Class Record

To view a Message Class record:

1. Click **Administration** on the Utilities tab in the ServiceCenter home menu.
2. Select the Notifications tab of the Administration menu.
3. Click **Log** in the Message Classes structure.
4. Enter a Class Name, or click **Search** to pass a *true* query and display a current class list.
5. Select a record to view from the list, which displays by clicking on the name.
6. View the desired record. Each class message presents a different form associated with the `msgclass.log` file.

Adding Message Class Records

1 Click **Administration** on the Utilities tab. of the ServiceCenter home menu.

2 Select the Notifications tab of the Administration menu.

3 Select an action type from the Message Classes structure (see *Message Classes* on page 164 for a description of each action type).

A blank Message Class File record is displayed.

4 Do one of the following:

- Begin entering the message name and data; **Class Name** can be the name of the particular event.
- Call up the message record, select an existing class record on which to base your new record. Make appropriate modifications, including a name change.

5 Click **Add** to confirm the new record shown in Figure 5-9.

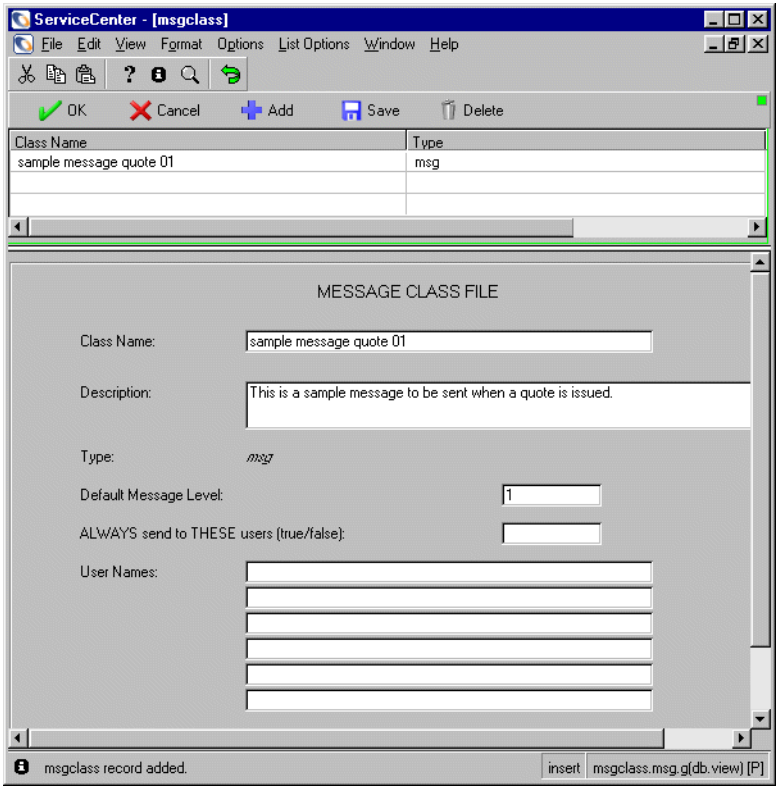

Figure 5-9: Sample message in Message Class file

Background Processing

A great deal of the processing which enables the alerts and updating in Request Management occurs in the background. Figure 5-10 shows the general event processing flow of the application.

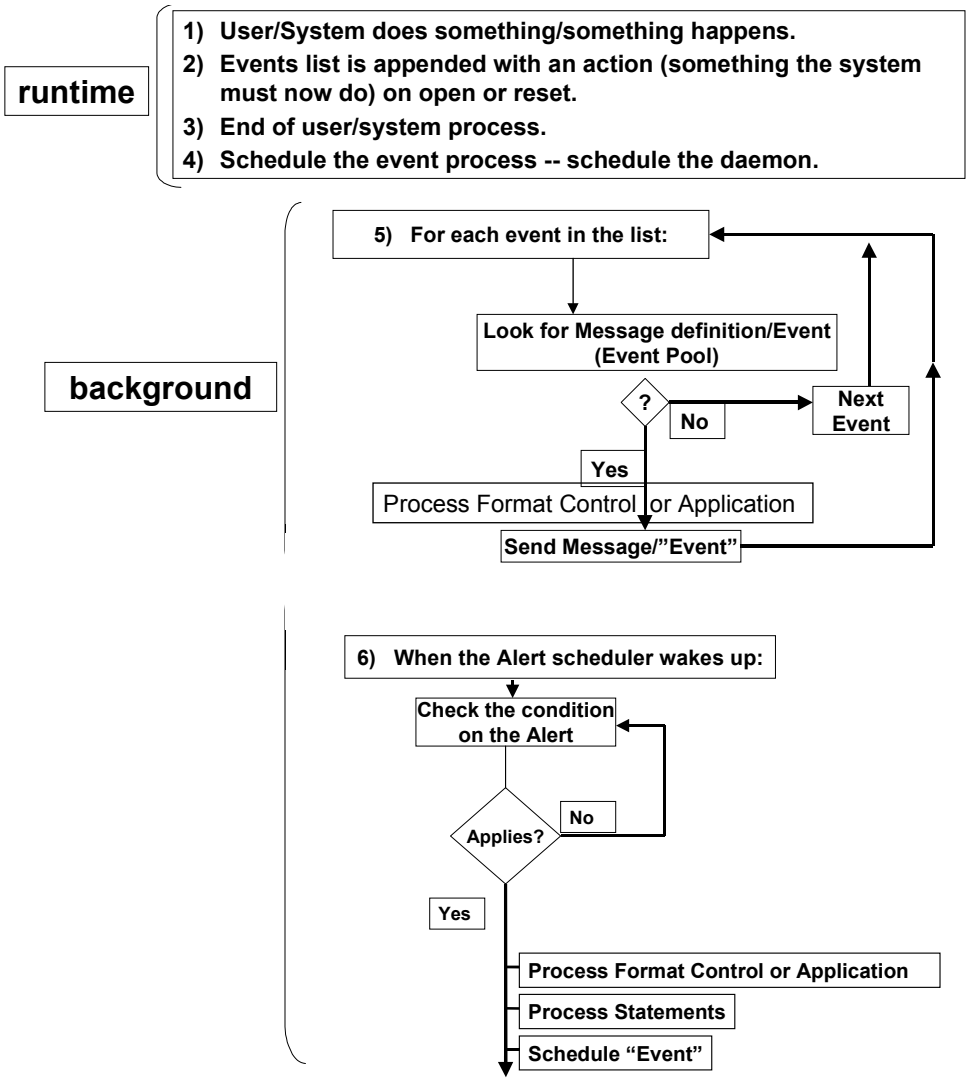

Figure 5-10: Process flow

The background processor for Request Management event processing and ordering is named *ocm*. This processor only handles schedule records with a class of *ocm*. By default, the processor checks for new records every 60 seconds.

Viewing the Processor

1 Click **Maintenance** on the Utilities tab in the ServiceCenter home menu.

2 Click **Startup Information** in the System tab.

The blank *info.startup* record form is displayed.

3 Enter ocm.startup in the **Type** field, and then press **Enter** or click **Search** to do a narrow search for the *ocm.startup* record type.

The *ocm.startup* record appears in the *info.startup* form shown in Figure 5-11. This is the default start-up record for the Request Management (*ocm*) background processor.

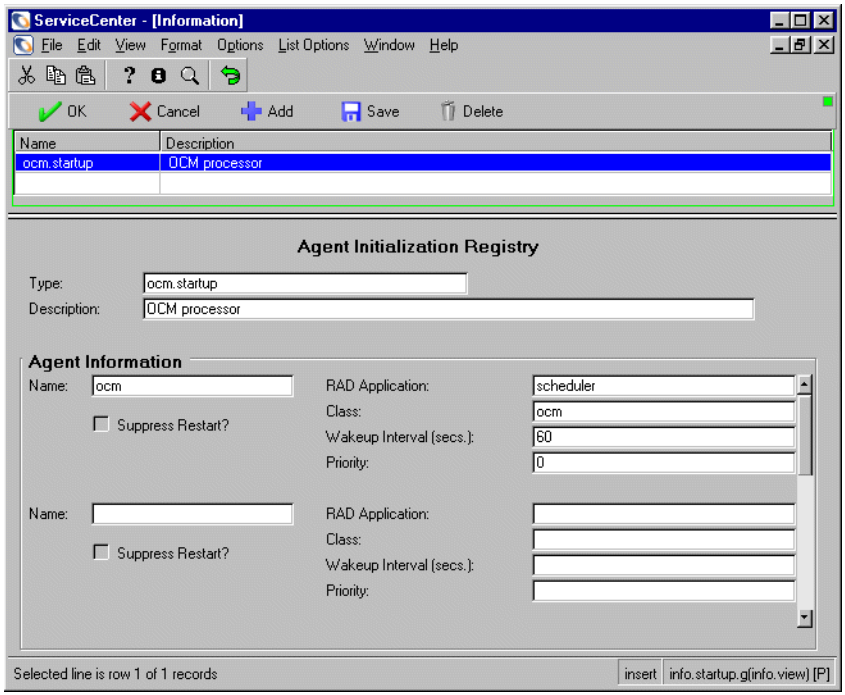

Figure 5-11: Request Management Startup Agent Record

4 The Request Management (*ocm*) background processor should be defined as an agent on the default system start-up record (*startup*).

The system startup default record lists the background agents, or processors, that start up each time ServiceCenter is started. Most are set for 60-second wake-up intervals. This list includes despooler, report, alert (for Incident Management), change, availability, agent, marquee, lister, linker, event, and scautod.

5 To add any of the remaining start-up records to the system startup record, enter the start-up record's information at the bottom of the system start-up record's agent array.

This system startup default record processes records that are in the schedule file. The appropriate background agent picks up the schedule record and processes it.

Note: Enter sch on a command line at any time to display the schedule file.

Notifications

The Notification Engine is primarily responsible for sending messages that are generated by ServiceCenter events, such as opening or closing a quote or order. Administrators can edit these messages, add new messages, change the conditions under which the messages will be sent out, as well as select who will receive the messages.

The notification file works with the message file to define notifications for common system events. Administrators can modify the notification arguments that trigger the notification, as well as define who receives the notification.

To open the notifications file:

1 Click the Utilities tab in the ServiceCenter main window.

2 Click **Administration**.

3 Click the Notifications tab.

4 Click **Notifications**.

The *notification* form is displayed.

5 Enter the Notification Definition name in the **Name** field and press **Enter** or perform a *true* query by clicking **Search** to see a list of all notification records on your system.

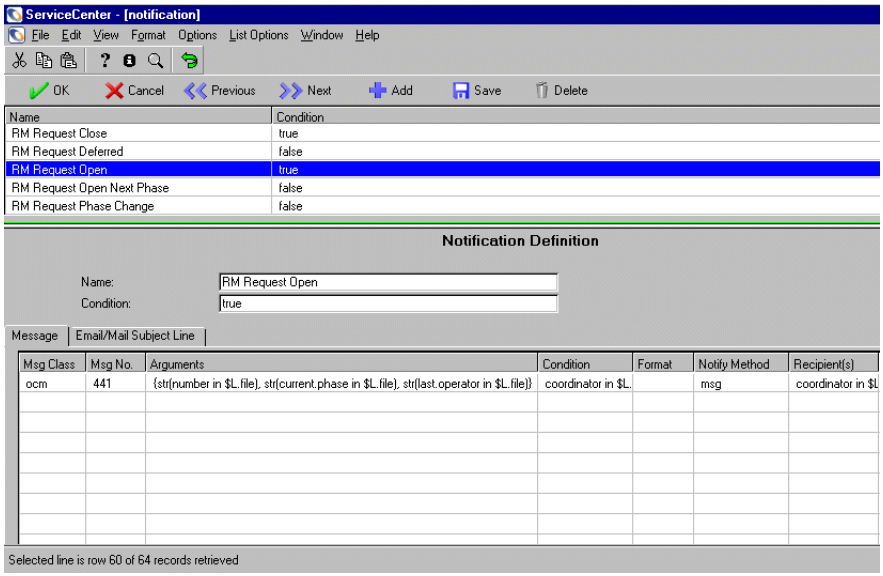

Figure 5-12: Request Management Notification definitions

To learn more about notification records and their definitions, see the *ServiceCenter System Tailoring Guide, Notification Records*.

The following fields are in the notification definition record:

Field	Description
Msg Class	Message class relates to the application area. For example ocm.
Msg No	Message number corresponds to the **scmessage.qbe.g** file. The Message Class, Message Number, and language fields make up the unique key for this notification. If you add your own message to the **message** file, the combination of the Msg Class, Msg No and Language fields must not exist in the system already.

Field	Description
Arguments	Message arguments can range from none to many. The arguments correspond to the %S in the message text. If there is only one argument, enter the value directly. List multiple arguments in an array. For example ({<arg1>,<arg2>, <and so on>}). Elements of the array can be string literals or expressions. To reference a value in a record, enter: fieldname in $L.file. Strings must be enclosed in double quotes.
Condition	Enter the condition under which the message should be sent. Values can be *True*, *False*, or an expression that evaluates to either *True* or *False*. The default value is *True*.
Notify Method	Specifies the how the message is sent (for example fax, email, etc.). This field can also specify the name of a message class.
Recipients	Specifies to whom the message should be sent. Enter an expression or string literal that references an individual user or group name.
Note: The following fields are only necessary if the Recipients field contains a group name.	
Group File	Enter the file that the group name is referencing. Use this field with the files ocmgroups, which allow multiple records to be created with the same group name.
Group Area	Acceptable values for use with the ocmgroups file are: All, Quotes, Line Items, and Orders.
Subgroug	The Subgroup field further specifies the user list. Values are: Members/Reviewers, Approvers and All.

6 Ordering

CHAPTER

An order is an indication to a vendor that an organization wants a service performed or a product delivered to a particular destination. The Ordering aspect of Request Management is, therefore, particularly useful when vendors are included in the business process. *Vendors* can be internal providers of parts and services, as well as external providers of parts and services.

This chapter covers the following areas, which involve order generation and control:

Overview

The best way to access order information is directly from the line item records, rather than order records themselves. The line items provide the detailed information about the items being ordered, rather than the order header fields. More useful query fields (such as Vendor Name or Assignee) are displayed through line items for the vendors to access information about their work or procurement obligations.

The benefits of orders when vendors are involved include:

- the ability to track the vendors.
- preparation by service organizations (such as, internal vendors) for upcoming work orders.
- simultaneous updating or closing order line items without interfering with others' access of the quotes.
- the use of Purchase Orders.

Generating Orders

Order generation occurs primarily in the background, with several methods available for triggering the actual generation.

Process

The Request Management order generation process allows control over several features:

- order frequency
- treatment of on-hand inventory
- combining line items into a common order line item

Locks

Request Management utilizes the concept of locks— the system's attempt to restrict access to records to ensure that multiple users are not applying updates to the same record at the same time. Locking is implemented at the Control Item level when a quote or order is viewed. When the quote or order is locked, all associated items are locked as well, including line items. For this reason, processing, such as the movement between and through phases, cannot occur while the user is modifying the control item records.

The system's background order processing attempts to lock the *Control Items* (parent quotes) of line items being processed or ordered. Therefore, certain implementation issues need to be considered. These include:

- scheduling of background order processing
- establishing the use of the Inactivity Timer (for parameters to *kill* inactive users) (See the *ServiceCenter System Administrator's Guide* for details about the Inactivity Timer.)

Background Processing

The background processor *ocm* manages Request Management ordering and event processing. This processor's interval is set by default to check every 60 seconds for *ocm* schedule records to process.

There are two *ocm* class schedule records for the ordering process:

- OCM Order Create for Line Item Schedule Record
  - also called Background Order Demand
  - (for *batch -- demand* order processing) executes the rmo.create.order application.
- OCM Check Availability
  - also called Background Order Check Availability
  - (for *batch -- anticipated* order processing) executes the rmo.create.check.avail application.

Viewing the Processor

1. Click **Maintenance** on the Utilities tab.
2. Click **Startup Information** from the System tab.

   The blank *info.startup* record form is displayed.
3. Enter ocm.startup.
4. Press **Enter**.

Figure 6-1 shows the *ocm.startup* record. This is the default start-up record for the Request Management (*ocm*) background processor.

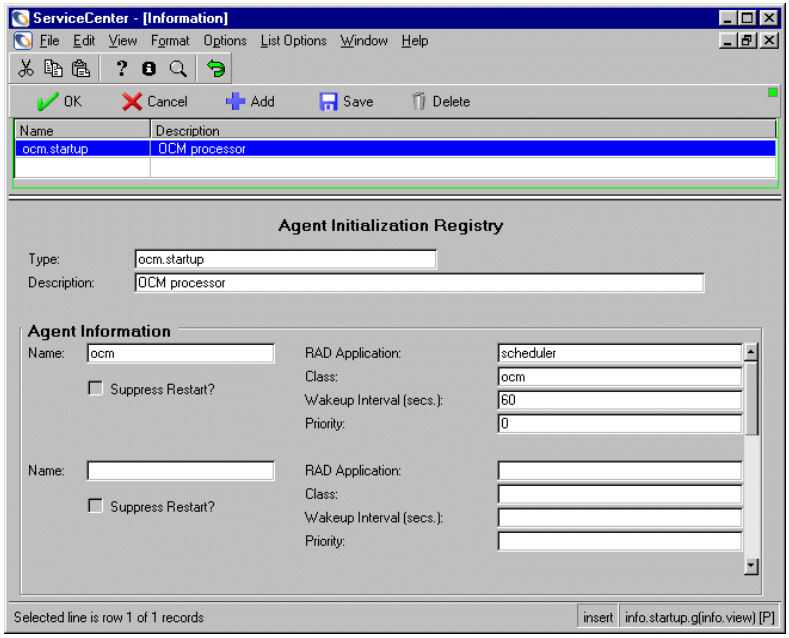

Figure 6-1: Request Management Background Schedule Agent

5 The Request Management (*ocm*) background processor should be defined as an agent on the default system startup record (*startup*).

The system startup default record lists the background agents, or processors, that start up each time ServiceCenter is started. This list includes *despooler, report, alert* (for Incident Management), *change, availability, agent, marquee, lister, linker, event,* and *scautod.* Most are set for 60-second wake-up intervals (Wakeup Interval (secs) field).

6 To add any of the remaining start-up records to the system start-up record, enter the start-up record's information at the bottom of the system start-up record's **Agent** array.

This system startup record processes records that are in the schedule file. The appropriate background agent picks up the schedule record and processes it.

Note: Enter sch on the command line at any time to display the schedule file.

Viewing Order Schedule Records

Viewing the *schedule.looksee* Schedule record:

- also called Background Order Demand
- (for *batch -- demand* order processing) executes the rmo.create.order application.
- uses the **ocmo.schedule.demand** form

To view the schedule record:

1. Select the Maintenance tab from the Request Management home menu.
2. Click **Administration**.
3. Click **Order Create Schedule** on the Orders tab.

   A blank *ocmo.schedule.demand* form is displayed.
4. Click **Search** from the system tray to retrieve any *ocm* schedule records. There is only one schedule record, *OCM Create Order*, shown in Figure 6-2.

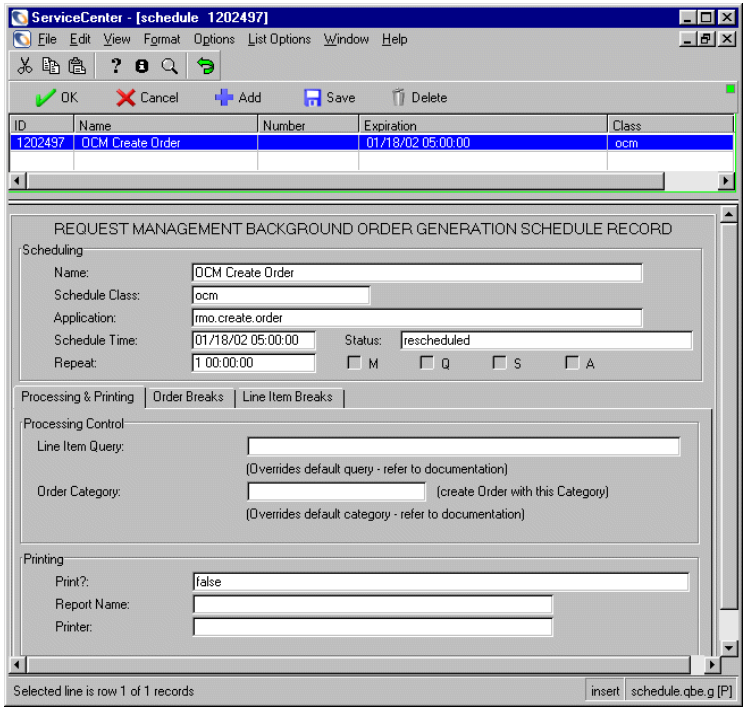

Figure 6-2: Background Order Schedule Record with Line Item Query

Important: If this record does not display, enter create default in the **Name** field, then click **Add**. The record is created and saved to the system.

OCM Check Availability Schedule Record

- also called Background Order Check Availability
- (for batch -- anticipated order processing) executes the rmo.create.check.avail application.
- uses the ocmo.schedule.check.avail form

Processing Control Records

Line Item Query—if entered, the query will override the default query executed against the ocml file:

```
avail.to.order=true and reorder.type="b" and
open=true and quantity.balance>0 and target.order<=tod()
```

Order Category—if entered, the order category used when the new order is created overrides the default order category, that is, the order category associated with the line item as defined in the modelvendor record.

To view a schedule record:

1. Select the Maintenance tab from the Request Management home menu.
2. Click **Administration**.
3. Click **Check Available Schedule** in the Orders tab.

   A blank *ocmo.schedule.check.avail* form is displayed.
4. Click **Search** from the system tray to retrieve any *ocmo* schedule records.

There may not be any at this time. The schedule record shown in Figure 6-3), *OCM Check Availability*, is an example.

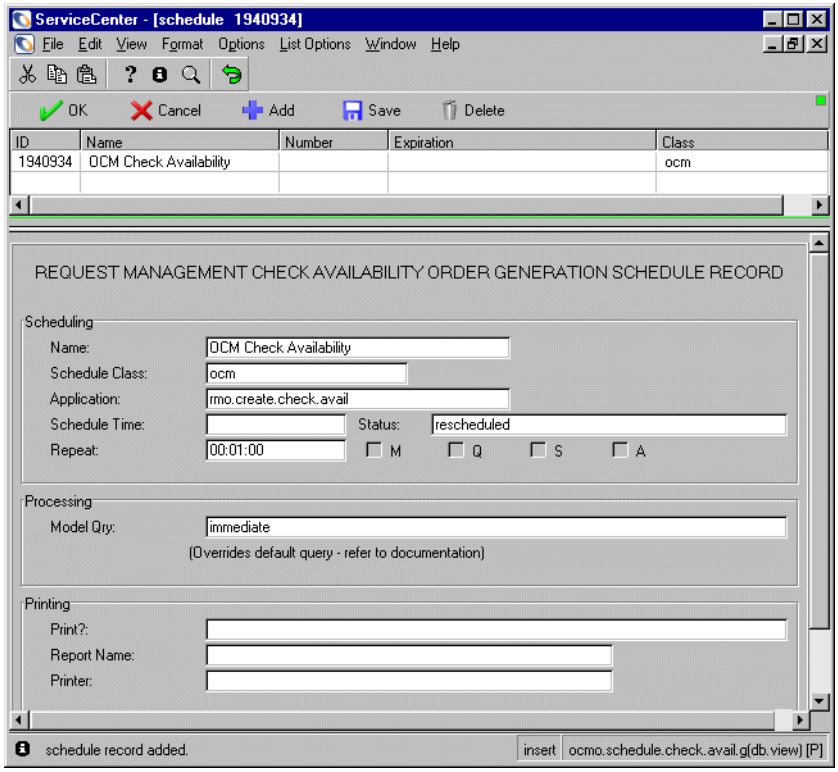

Figure 6-3: Order Availability Check Record

Important: If the record is blank, click **Add** to save the new record to the system.

Methods

The following order-generation methods are supported by Request Management. Enter a method in the **Processing Model Qry** field.

- **Batch: *immediate***—as soon as a line item with a reorder type of *immediate* is marked available to be ordered, a schedule record is created that will create an order for the line item. The order created has one line item that corresponds to the quote line item (one to one). It is ordered regardless of the planned order date. When the order line items are closed, the corresponding quote line items are closed. This is especially useful for work or service line items or high priority items.
- **Batch: *demand***—this type of ordering gathers all line items that have been marked ready for ordering, are *batch* reorder types, and the planned order date has passed. The orders created use the high and low breaks, as set in the schedule record. Each order line item may have several quote line items that have been combined to allow for bulk purchases. When the order line items are closed, the corresponding quote line items are closed.
- **Batch: *anticipated***—this type of ordering is a scheduled process, which goes through the model file, looking for catalog items that are *batch* reorder types. The reorder amount>0, and the reorder point is greater than the available + on order + backordered. This process creates orders for the specific parts.
- **Manual: *physical***—the ability to create an order manually. This is similar to creating a quote with line items, but instead of a quote it's an order with line items.
- **Manual: *gen orders option***—the ability to generate an order directly from a quote, through an option in the Options menu. This option creates a background process schedule record to create an order for each quote line item that is marked available to be ordered, one order for each line item.

Batch Ordering

Batch ordering is controlled by the *demand* schedule records. There can be more than one of these demand schedule records in the schedule file at one time, to be processed at different intervals and executing different queries.

These schedule records determine when and how often to generate orders.

They also define what field values cause a break to a new order, as quotes are processed. The options here include values found in the vendor, vendor.contract.no, trans.type, bill.to.code, ship.to.code, shipping.terms, tax.rate, payment.terms, payment.freq, and no.of.payments fields.

Determining what causes a break to a new order line item is also contained in the demand schedule records. The options include values from the part.no, unit.cost, unit.of.measure, and discount fields.

Processing Control Fields

To view a schedule record:

1. Select the Maintenance tab from the Request Management home menu.
2. Click **Administration**.
3. Click **Check Available Schedule** in the Orders tab.

   A blank ocmo.schedule.check.avail form is displayed.
4. Click **Search** from the system tray to retrieve any *ocmo* schedule records.

Processing Control records (see Figure 6-2 on page 175):

Line Item Query—if entered, the query will override the default query executed against the ocml file:

```
avail.to.order=true and reorder.type="b" and
open=true and quantity.balance>0 and target.order<=tod()
```

Order Category—if entered, the order category used when the new order is created overrides the default order category, that is, the order category associated with the line item as defined in the modelvendor record.

Order Breaks and Line Item Breaks

To tailor an implementation's order processing, the Order Breaks and Line Item Breaks array fields on this Demand schedule record allow listing of field names in a sequence that must coincide with a key in the ocml Database Dictionary record. The system checks these field names for differences, as each record is processed, to control when to complete the current order or line item and start a new one (for example, when to "break").

Important: In the base system's **ocml** Database Dictionary record, there is a key containing the following five fields: avail.to.order, reorder.type, open, quantity.balance, and target.order. *Do not* modify this key.

OCM Order Create for Line Item Schedule Record:

- also called Background Order Demand
- (for batch -- demand order processing) executes the ocmo.create.order application.
- uses high breaks for Order Breaks (for example, creates new order record)
- uses low breaks for Line Item Breaks (for example, creates a new line item entry within current order).
- will automatically use the "backend" field as the first high break. This field is used when certain orders are sent to an external system.

Routing Orders to External Purchase Systems

The processing for orders is the same as for quotes (for example, an order can have approvals, alerts, associated events and messages defined).

Specifically for orders, certain possibilities are available for interfacing with external systems:

- Email notifications can be sent as usual.
- In Format Control, an **eventout** record could be created (see the *ServiceCenter System Tailoring Guide, Format Control*).
- If batch processing is used, the order can be printed to a specific printer. (Note that printing of the *immediate* ordering type is not supported.)
- Alternatively, a file unload process could be performed for recently created orders, and the file moved to an external procurement system with receipt information fed back into ServiceCenter.

Prepare for Background Ordering Requirement

Request Management may be set up to automatically send orders to an external system. So with the Background ordering of events and line items requirements in place, those items become ready for ordering (*avail-to-order* items). Orders that are created with an external backend defined will be routed to the external system, according to the *ocmbackend* definition for that event.

Line items are defined as *ready to order* on the ocml.view.default form.

To create a Background Event (*ocmbackend*) record:

1. Select the Maintenance tab from the Request Management home menu.
2. Click **Administration**.
3. Click **Backend Order Destinations** on the Orders tab.
4. Begin entering the appropriate values for the backend event, based on the field definitions below.

   -or-

Click **Search** from the system tray to bring up a list of existing backend event records. Figure 6-4 shows an *ocmbackend* form.

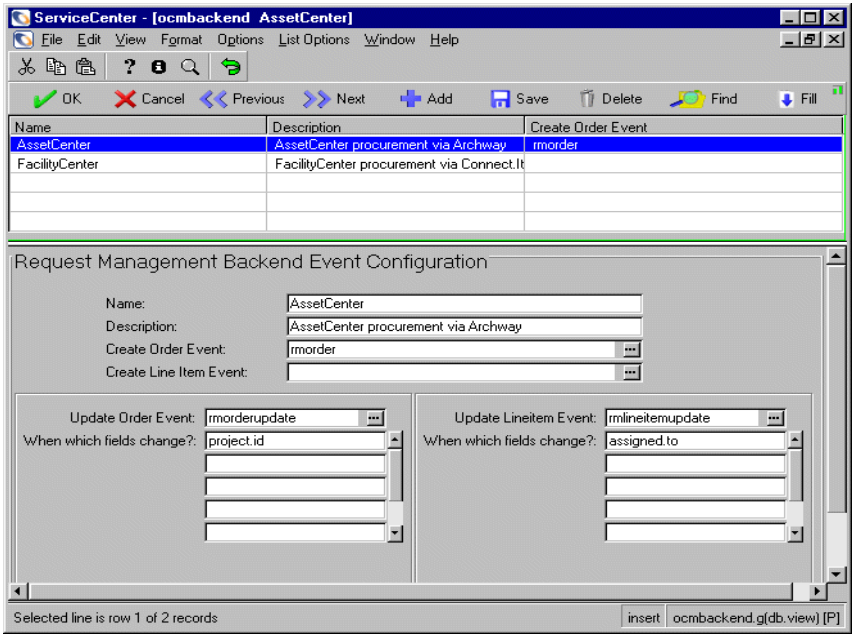

Figure 6-4: Adding a new Backend Event

a Choose an event you would like to base your new backend event configuration on, and open it by clicking the name.

b Enter a new backend event **Name**.

c Begin additional modifications to the record to create your new backend event configuration record. See the field definitions below.

Field	Description
Name *(required)*	Unique name for this Backend Order event.
Description	A short description of this event item (no more than 30 characters in length).
Create Order Event	Creates a Backend Order event, based on what information should be sent every time an order is placed.
Create Line Item Event	Creates a Backend Line Item event, based on what information should be sent every time a line item part is ordered.

Field	Description
Update Order Event	Updates will be applied to the order, according to the fields noted in the When which fields change? field (below) for Backend Order events.
When which fields change?	Indicates which of the order's fields should change when the Backend Order event is sent.
Update Lineitem Event	Updates will be applied to the line items, according to the fields noted in the When which fields change? field (below) for Line Item events.
When which fields change?	Indicates which of the Line Item fields should change when the Backend Line Item event is sent.

5 When you have completed setting up the values for this new event, click **Add** to add it to the ocmbackend file.

Access ocml.view.default Line Item View

The ocml.view.default Line Item view form displays the ordering controls that were set in the Catalog for the part and copied over to the line item during the request process (see *Catalog Operations* on page 61).

1 Select the Line Item tab from the Request Management home menu.

2 Click **Line Item Queue**.

A blank screen (*sc.manage.ocml* form) is displayed.

3 Click **Search** to bring up a blank *ocml.search* form.

4 Pass a *true* query by clicking **Search** without entering any values into the fields, or enter any information you know about a line item order record value in the form and press **Enter** to call a specific line item category record.

A list is displayed along with the first item in the list.

5 Select a line item record from the displayed queue of current items by clicking on the number.

Figure 6-5 shows the selected line item record in the *ocml.view.default* form.

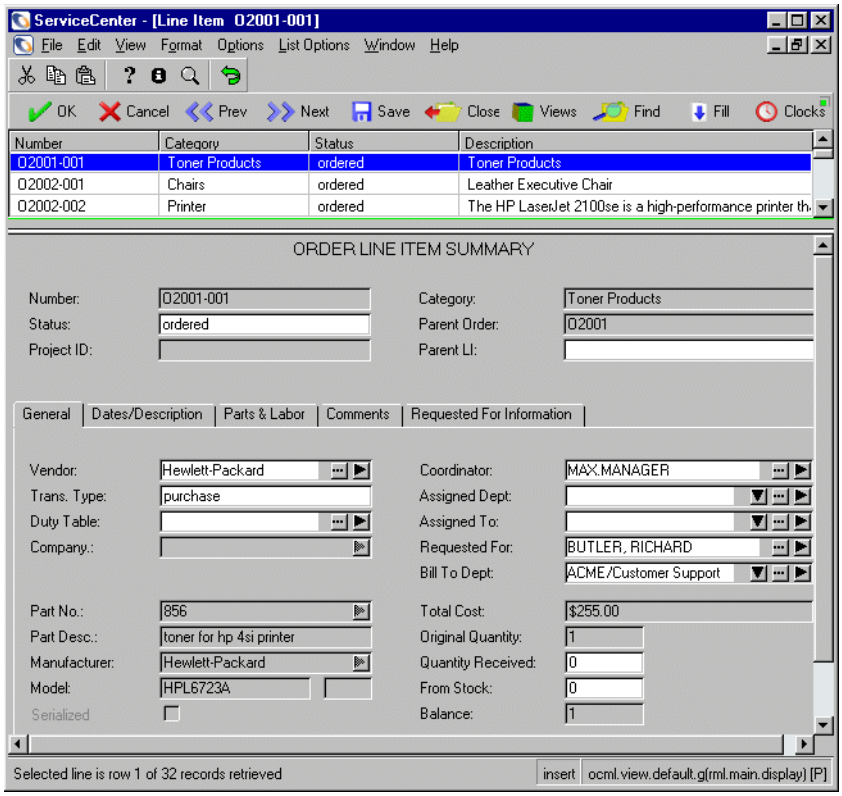

Figure 6-5: Order Line Item summary

To see different views of the data, select **Views** in the system tray and select a different view from the menu.

CHAPTER 7 Closing and Receiving

Once a quote has been officially entered into the system, approvals made, and the associated orders generated, the order process moves into a *receiving* mode and closes the individual line items.

This chapter discusses the following topics in regards to closing and receiving ordered and requested items:

Overview

This part of the process begins with the receiving and closing of individual order line items. These line items, which make up the larger orders, are then traced back to the initiating quote, which can then be closed itself when all items (parts and services) have been received/closed. Along this route, there are several automatic and manual procedures, which track and associate related processes.

Closing/Receiving Order Line Items

Although the workflow of request processing through Request Management can be considered the front-end component to be interfaced with an external purchasing system, Request Management does receive against the orders within the system.

If you use an external purchasing system, the recommendation is to record the other system's Purchase Order Numbers (usually found on packing slip information) on the order in Request Management. This involves creating a field on the quote and/or order line item formats associated with the ocml file. Remember to add the field to the dbDict as well (see the *ServiceCenter System Tailoring Guide* for information about adding fields to the dbDict). Then the actual order generated through the external purchasing system can be tracked and associated with the original quote, or request, in ServiceCenter.

Note: If you order items through Get.It! Resources, you do not need to receive in ServiceCenter.

- Order line items for services are *closed* after the work is completed.
- Order line items for parts marked in the Catalog for receipt are *received* -- these parts can be *serialized* or *non-serialized* (for example, distinguished by a unique serial number or not).

After receiving parts representing order line items that may have been combined from several different quote line items, a distribution screen is presented by default to post the receipt information back to the quote line items that generated the order.

After the user completes the receiving and posting process for an order line item, the system can be set to automatically close the original quote line item.

Close Process

1. Select the Orders tab from the Request Management menu.
2. Do one of the following:
   - If you know the number of the order you wish to retrieve, click **Search Orders** and enter the number of the order you want. Click **Search** again.
   - If you do not know the order number:
     - Click **Order Queue** on the Orders tab to bring up the order record list.
     - A record list, including all line items which have been grouped in each order, will display.
     - Select a record to open and double-click on the number.
     - The order record appears, including all line items which have been grouped into this order. Double-click the order number you would like to view.
3. To view one of the line items, click the numbered button (Line Number button) beside the status and other item information in the Order Summary tab.

Figure 7-1 shows the selected order line item record.

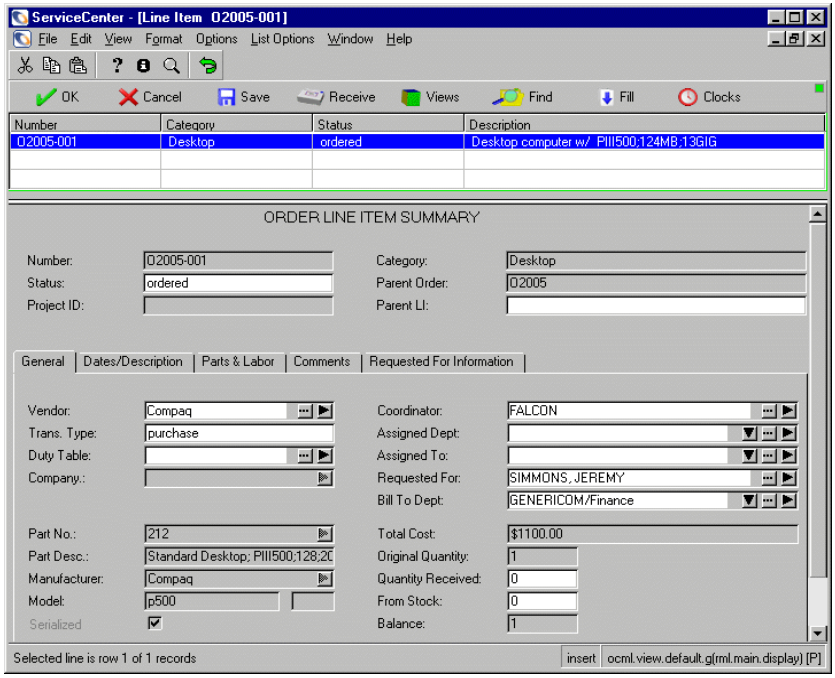

Figure 7-1: Sample Order Line Item summary

- A *part* line item record will display a **Receive** button.
- A *service* line item record will display a **Close** button.

4 Click **Receive** or **Close** to achieve the following:

- Update the current phase of the order.
- Close the order line item with a status of *closed*.
- Close the originating quote line item.

For this example, click **Receive** and then click **OK**.

Note: Scripts can be used during the close process for the operator to provide further comments about the work performed. The name of the Close Script is displayed on the line item's phase definition.

When you click **Receive**, the default receiving screen (*ocmlrec.receive*) shown in Figure 7-2 appears. A different receiving format can be designated on the line item category phase definition for the part selected from the catalog.

Receipt Verification

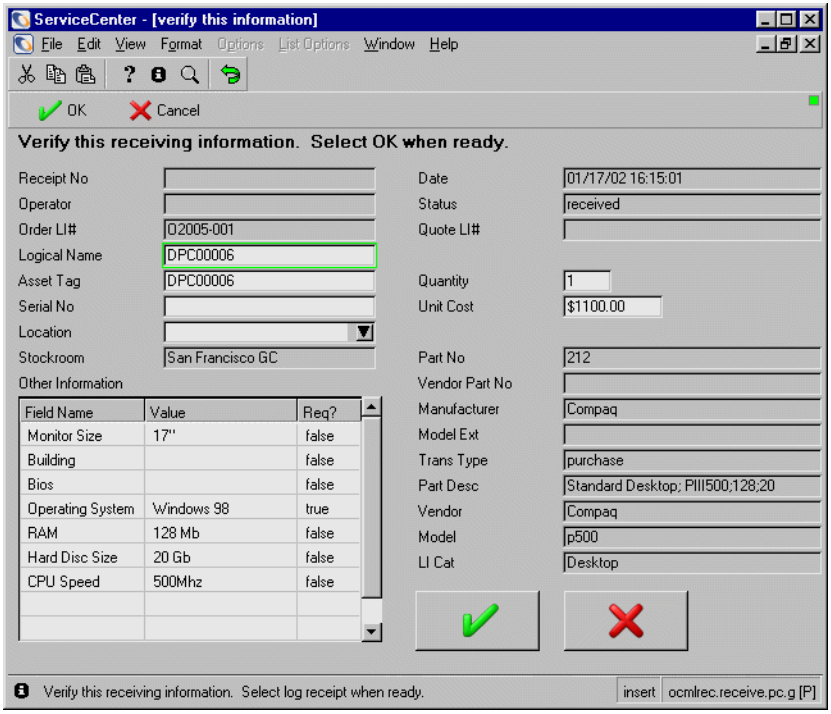

Figure 7-2: Sample Line Item Receipt Verification

The receiving process:

- Logs the receipt of serialized equipment.
  - The Catalog indicates whether an item is to be received and whether it is serialized.
  - If an item is serialized, it must:
  - be Received
  - have a quantity of 1
  - have a Serial No.
- Posts data to the **model** record.
- Distributes (posts) the received quantities to the original quote line items.

Confirmation

When you click OK to confirm receiving/distribution (see *Receipt Verification* on page 189), a distribution confirmation screen can be presented, according to your business rules and the user profiles. Users must provide confirmation for the process to complete, terminate, or reset. Depending on the site's process flow, receiving personnel may or may not be able to provide this information.

By default, the system assigns the receipt to the first line items possible.

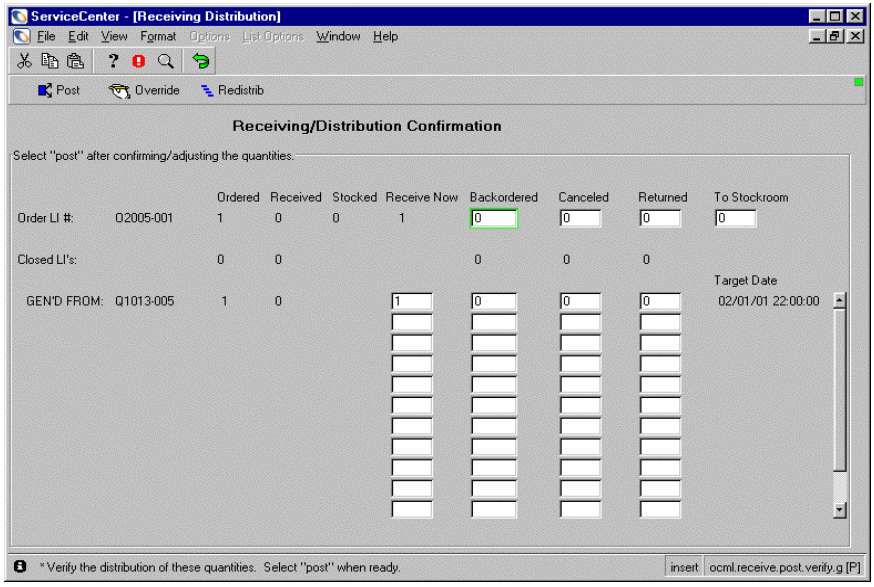

Figure 7-3: Confirmation of Receipt

Confirmation options

Option	Description
Post	Creates schedule records to post the indicated quantities to original quote line items in a background process. The process waits until the targeted record is released (not locked or in use by another user) before posting is completed.
Override	Bypasses the cross-checking for line item totals that occurs after the Post selection; forces the system to accept the quantities as entered, even if cross-checking issues an error message.
Redistribute	Sets quantities back to original distribution.

- If there are any dependent line items ready for ordering, the system marks them accordingly.
- If there are no further line items to be ordered, the order goes to the next phase.
- If there is no next phase, the order is closed.

Receiving Log

The receiving log tracks the receipt of serialized and non-serialized equipment. The system populates this file after the receiving process.

A benefit of the receiving log (ocmlrec) record is that it provides the serial number of the particular item or device for posting to the inventory.

To access the log:

1. Select the Maintenance tab from the Request Management menu.
2. Click **Administration**.
3. From the Line Items tab, click **Receiving Log**.

Format Control and Link Records

The Format Control record for the ocmlrec form updates the receiving log. This Format Control record can be tailored to implement the posting process. See the *ServiceCenter System Tailoring Guide* to learn more about Format Control settings.

The link record ocml.receive.copy copies data from the line item to the receiving log. This link record (and the ocmlrec database dictionary record) can be modified to track additional data fields. See the *ServiceCenter System Tailoring Guide* to learn more about linking records.

Posting

Posting is the process of copying data from a source record to a target record. The purpose of posting is to update similar fields in other records without having to open those records to modify each field.

A link record defined to support the posting process copies data from orders (*source* records) to quotes (*target* records). Its Comment field(s) must start with the word *POST*.

1 Click **Tools** in the Utilities tab in the system administrator's home menu.

The Tools menu is displayed.

2 Click **Links**.

3 Enter the name of the Link record you wish to create in the **Form** field of the Link Manager dialogue box.

4 Click **New**.

5 Enter the following values in the first line of the new Link record:

Field	Value
Source Field Name	requested.by
Format/File Name	contacts
Target Field Name	contact.name
Comments	POST

Important: You must enter **POST** in upper case letters in the **Comment** field for the Posting process to work.

Figure 7-4 shows the new Link record.

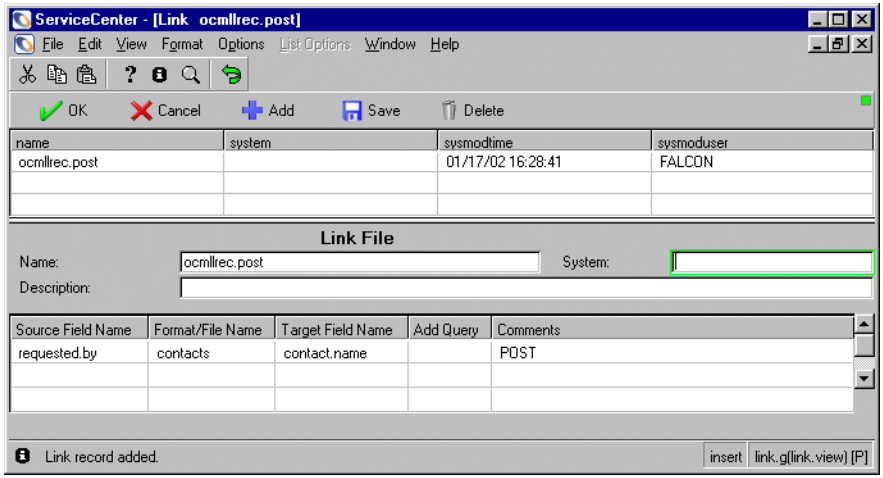

Figure 7-4: Posting Link Record

Posting to a new inventory record is done automatically for all models that have a configuration file defined. However, further posting of actions may occur, but these require tailoring to the system.

If the background posting process cannot lock records, the posting is rescheduled for a certain time in the future (for a maximum number of times). If the risk of two users accessing and modifying a record simultaneously is unacceptable, other alternatives should be considered for posting to records that need to be locked.

The process of posting is covered in the *Format Control* section of the *ServiceCenter System Tailoring Guide*. In Request Management, the master Format Control records (*ocmq, ocmo, or ocml*) execute first; then the category Format Control (name=phase definition's default view). These Format Control records can call the post.fc application.

CHAPTER 8 Request Management Event Services

Increasingly, enterprise-wide network management tools depend on automation to detect activity on the network and to execute the appropriate procedures. These network incidents are often called alarms or alerts; ServiceCenter refers to them as *events*.

This chapter discusses the following topics:

Overview

ServiceCenter includes Event Services enhancements in Request Management to support external event processing. To modify the Event Services enhancements, see the *ServiceCenter Event Services Guide* for detailed information.

External Event Services

The External Event Services enhancements include the following events.

Area	Action	Description
Quote	Approve	Approve a quote
Quote	Deny	Deny a quote
Quote	Retract	Retract a quote
Quote	Open	Create a new quote
Quote	Update	Update an existing quote
Quote	Close	Close current phase and goto next if exists
Order	Approve	Approve an order
Order	Deny	Deny an order
Order	Retract	Retract an order
Order	Open	Create a new order
Order	Update	Update an existing order
Order	Close	Close current phase and goto next if exists
Line Item	Open	Create a new line item
Line Item	Update	Update an existing line item
Line Item	Close	Close current phase and go to next, if exists

Logical Actions

There are 12 logical actions that are executed via four actual event classes.

Event Class	Description
rmlin	Used for open/update/close of all line items
rmoin	Used for open/update/close of orders
rmqin	Used for open/update/close of quotes
approval	Used to approve quotes and orders.

Approval Classes

Approval classes are used to send approval actions into Request Management. The structure of their event strings is as follows:

Sequence	Description
1	File name of the object to be acted upon. ocmq = quotes ocmo = orders
2	Number of the object to be acted upon.
3	Group for which the operator has rights to approve orders. If left blank, operator has rights to all groups.
4	Action taken, indicating whether *approve*, *retract*, or *deny*.
5	Date and time approval was sent. Mapped data fields containing changes to the record. Processed along with the approval.
6	Identification of the operator who is executing this approval. The approval happens in this operator's security context.

Record Modification Classes (rmlin, rmqin, rmoin)

These three events (*rmlin*, *rmqin*, *rmoin*) are used to send record modification actions into Request Management for line items, quotes, and orders. The structure of their event strings is as follows:

Sequence	Description
1	Number of the object to be acted upon. If in rmlin, this will be a line item number. If in rmqin, this will be a quote number. If in rmoin, this will be an order number. In the open process, this field is discarded.
2	Operator ID who is executing this action. The action takes place within this operator's security context.
3	Action Token, indicating what type of modification action to take. One of *open, update, close.*
4..*n*	Mapped data fields, containing changes to the record. Processed along with the approval.

Example Event String Start Sequences (Ignores Data Fields)

See *Accessing Event Services* on page 199 to access Event Services.

To approve a quote (such as, number Q1234), acting as *FALCON*, within the security group management:

- Send an **Approval** event with this string:

```
ocmq^Q1234^^approve^02/20/01 06:00^FALCON^ok
```

To update a line item (such as, L78), acting as *BOB.HELPDESK*:

- Send an ***rmlin*** event with this string:

```
L78^BOB.HELPDESK^update^.....
```

To move an order (such as, O89) to its next phase, acting as *MAX.MANAGER*:

- Send an ***rmoin*** event with this string

```
O89^MAX.MANAGER^close^.....
```

Accessing Event Services

Windows Client

To access Event Services:

1 Log on to ServiceCenter.

Note: You must be a ServiceCenter system administrator to work in Event Services.

For detailed information about accessing Event Services, see the *ServiceCenter Event Services Guide*.

2 Select the Utilities tab on the ServiceCenter main menu, as shown in Figure 8-1.

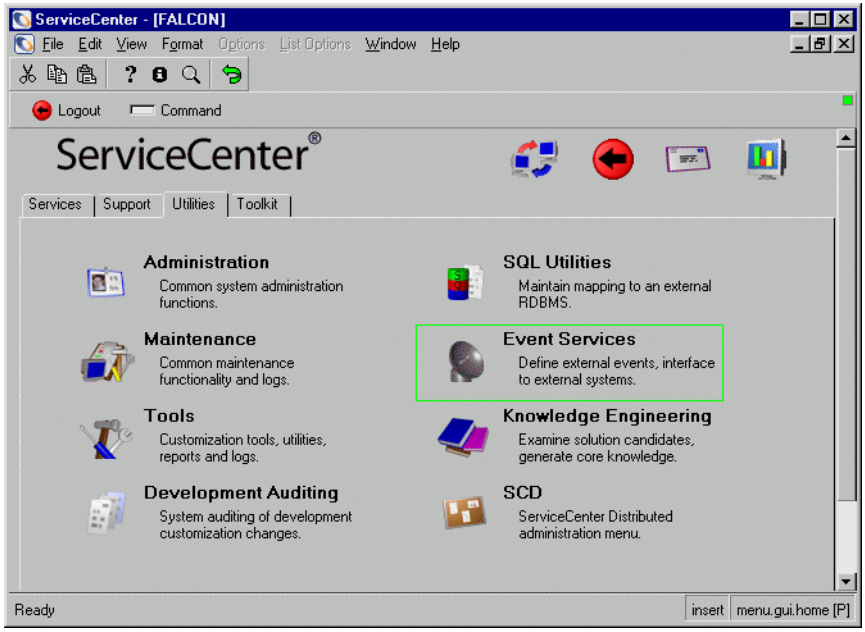

Figure 8-1: Utilities tab in the system administrator's home menu

3 Click Event Services.

Figure 8-2 shows the Event Services menu.

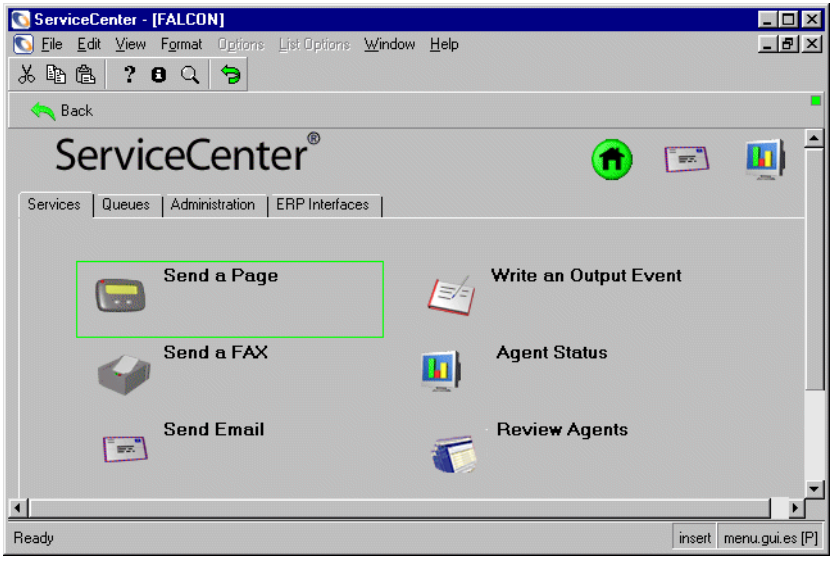

Figure 8-2: Event Services Main Menu

4 Click the Queues tab.

Queues tab

Figure 8-3 shows the Queues tab.

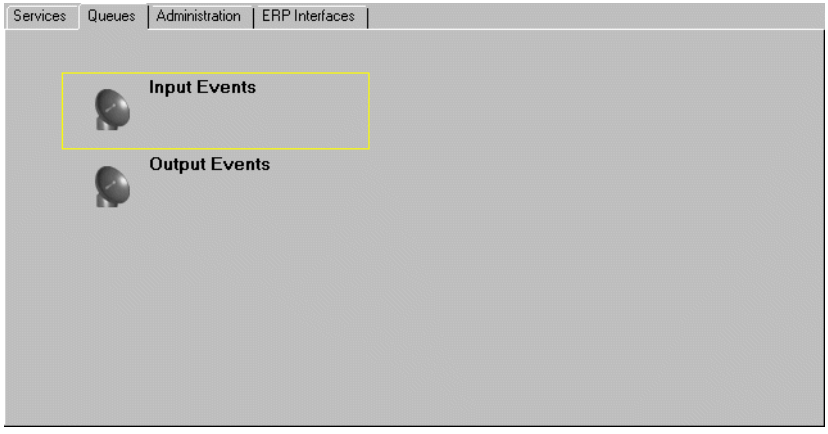

Figure 8-3: Queues tab

Button	Action
Input Events	Opens the **eventin** file for review. This file contains all events awaiting action by ServiceCenter and those that have been processed but not deleted.
Output Events	Opens the **eventout** file for review. This file contains all ServiceCenter events awaiting action by an external application and those that have been processed but not deleted.

Quote Events

The following table describes quote events.

Map Name	Sequence	Position	File Name	Field
rmq	1	1	ocmq	number
rmq	1	2	ocmq	$L.void.operator
rmq	1	3	ocmq	$L.void.action
rmq	1	4	ocmq	open
rmq	1	5	ocmq	page
rmq	1	6	ocmq	category
rmq	1	7	ocmq	current.phase
rmq	1	8	ocmq	phase.num
rmq	1	9	ocmq	phase.start.date
rmq	1	10	ocmq	orig.operator
rmq	1	11	ocmq	last.operator
rmq	1	12	ocmq	impact
rmq	1	13	ocmq	total.line.items
rmq	1	14	ocmq	alert
rmq	1	15	ocmq	alert.names
rmq	1	16	ocmq	approval.status
rmq	1	17	ocmq	pending.groups

Map Name	Sequence	Position	File Name	Field
rmq	1	18	ocmq	status
rmq	1	19	ocmq	priority
rmq	1	20	ocmq	reason
rmq	1	21	ocmq	business.area
rmq	1	22	ocmq	submit.date
rmq	1	23	ocmq	update.date
rmq	1	24	ocmq	close.date
rmq	1	25	ocmq	cancelled.date
rmq	1	26	ocmq	requestor.name
rmq	1	27	ocmq	requestor.dept
rmq	1	28	ocmq	coordinator
rmq	1	29	ocmq	coord.dept
rmq	1	30	ocmq	assigned.to
rmq	1	31	ocmq	assigned.dept
rmq	1	32	ocmq	description
rmq	1	33	ocmq	justification
rmq	1	34	ocmq	comments
rmq	1	35	ocmq	ship.to.code
rmq	1	36	ocmq	bill.to.code
rmq	1	37	ocmq	shipping.terms
rmq	1	38	ocmq	total.cost
rmq	1	39	ocmq	completion.code
rmq	1	40	ocmq	completion.notes
rmq	1	41	ocmq	li.mark.flag
rmq	1	42	ocmq	bill.to.ext
rmq	1	43	ocmq	ship.to.ext
rmq	1	44	ocmq	phase.desc
rmq	1	45	ocmq	project.id
rmq	1	46	ocmq	orig.manager.group

Map Name	Sequence	Position	File Name	Field
rmq	1	47	ocmq	requested.date
rmq	1	48	ocmq	admin.lead.time
rmq	1	49	ocmq	duty.table
rmq	1	50	ocmq	parts.summary
rmq	1	51	ocmq	foreign.id
rmq	1	52	ocmq	requestor.phone
rmq	1	53	ocmq	manager
rmq	1	54	ocmq	logical.name

Order Events

Map Name	Sequence	Position	File Name	Field
rmo	1	1	ocmo	number
rmo	1	2	ocmo	$L.void.operator
rmo	1	3	ocmo	$L.void.action
rmo	1	4	ocmo	open
rmo	1	5	ocmo	page
rmo	1	6	ocmo	category
rmo	1	7	ocmo	current.phase
rmo	1	8	ocmo	phase.num
rmo	1	9	ocmo	phase.start.date
rmo	1	10	ocmo	orig.operator
rmo	1	11	ocmo	last.operator
rmo	1	12	ocmo	impact
rmo	1	13	ocmo	total.line.items
rmo	1	14	ocmo	vendor
rmo	1	15	ocmo	alert
rmo	1	16	ocmo	alert.names
rmo	1	17	ocmo	approval.status
rmo	1	18	ocmo	pending.groups
rmo	1	19	ocmo	status
rmo	1	20	ocmo	priority
rmo	1	21	ocmo	reason
rmo	1	22	ocmo	business.area
rmo	1	23	ocmo	submit.date
rmo	1	24	ocmo	update.date
rmo	1	25	ocmo	close.date
rmo	1	26	ocmo	coordinator
rmo	1	27	ocmo	coord.dept

Map Name	Sequence	Position	File Name	Field
rmo	1	28	ocmo	total
rmo	1	29	ocmo	description
rmo	1	30	ocmo	justification
rmo	1	31	ocmo	comments
rmo	1	32	ocmo	invoice.no
rmo	1	33	ocmo	vendor.contact
rmo	1	34	ocmo	shipping.terms
rmo	1	35	ocmo	po.number
rmo	1	36	ocmo	completion.code
rmo	1	37	ocmo	completion.notes
rmo	1	38	ocmo	net.total
rmo	1	39	ocmo	tax.code
rmo	1	40	ocmo	tax.rate
rmo	1	41	ocmo	tax.amount
rmo	1	42	ocmo	ship.to.code
rmo	1	43	ocmo	vendor.zip
rmo	1	44	ocmo	bill.to.code
rmo	1	45	ocmo	shipping.carrier
rmo	1	46	ocmo	freight.on.board
rmo	1	47	ocmo	payment.terms
rmo	1	48	ocmo	freight.charges
rmo	1	49	ocmo	vendor.contract.no
rmo	1	50	ocmo	discount.rate
rmo	1	51	ocmo	discount.amt
rmo	1	52	ocmo	ship.to.ext
rmo	1	53	ocmo	bill.to.ext
rmo	1	54	ocmo	phase.desc
rmo	1	55	ocmo	project.id
rmo	1	56	ocmo	target.date

Map Name	Sequence	Position	File Name	Field
rmo	1	57	ocmo	shipping.terms
rmo	1	58	ocmo	orig.manager.group
rmo	1	59	ocmo	parts.summary
rmo	1	60	ocmo	foreign.id

Line Item Events

Map Name	Sequence	Position	File Name	Field
rml	1	1	ocml	number
rml	1	2	ocml	$L.void.operator
rml	1	3	ocml	$L.void.action
rml	1	4	ocml	page
rml	1	5	ocml	phase.num
rml	1	6	ocml	phase.desc
rml	1	7	ocml	category
rml	1	8	ocml	current.phase
rml	1	9	ocml	status
rml	1	10	ocml	parent.quote
rml	1	11	ocml	parent.order
rml	1	12	ocml	parent.line.item
rml	1	13	ocml	gen.ord.li
rml	1	14	ocml	project.id
rml	1	15	ocml	alert
rml	1	16	ocml	alert.names
rml	1	17	ocml	orig.operator
rml	1	18	ocml	last.operator
rml	1	19	ocml	trans.type
rml	1	20	ocml	open
rml	1	21	ocml	avail.to.order

Map Name	Sequence	Position	File Name	Field
rml	1	22	ocml	business.area
rml	1	23	ocml	receiving.priority
rml	1	24	ocml	track.receiving
rml	1	25	ocml	consolidate
rml	1	26	ocml	combine
rml	1	27	ocml	deffered.select
rml	1	28	ocml	generate.order
rml	1	29	ocml	serialized
rml	1	30	ocml	reorder.type
rml	1	31	ocml	submit.date
rml	1	32	ocml	phase.start.date
rml	1	33	ocml	update.date
rml	1	34	ocml	close.date
rml	1	35	ocml	ordered.date
rml	1	36	ocml	received.date
rml	1	37	ocml	returned.date
rml	1	38	ocml	backorder.date
rml	1	39	ocml	cancelled.date
rml	1	40	ocml	requested.date
rml	1	41	ocml	projected.date
rml	1	42	ocml	target.date
rml	1	43	ocml	actual.date
rml	1	44	ocml	requested.lead.time
rml	1	45	ocml	target.lead.time
rml	1	46	ocml	normal.lead.time
rml	1	47	ocml	actual.lead.time
rml	1	48	ocml	duty.table
rml	1	49	ocml	coordinator
rml	1	50	ocml	coord.dept

Map Name	Sequence	Position	File Name	Field
rml	1	51	ocml	assigned.to
rml	1	52	ocml	assigned.dept
rml	1	53	ocml	quantity
rml	1	54	ocml	quantity.returned
rml	1	55	ocml	quantity.received
rml	1	56	ocml	quantity.bo
rml	1	57	ocml	quantity.cancelled
rml	1	58	ocml	quantity.balance
rml	1	59	ocml	from.stock
rml	1	60	ocml	description
rml	1	61	ocml	comments
rml	1	62	ocml	ship.to.code
rml	1	63	ocml	ship.to.ext
rml	1	64	ocml	bill.to.code
rml	1	65	ocml	bill.to.ext
rml	1	66	ocml	serial.no.
rml	1	67	ocml	shipping.terms
rml	1	68	ocml	completion.code
rml	1	69	ocml	completion.notes
rml	1	70	ocml	part.no
rml	1	71	ocml	part.desc
rml	1	72	ocml	manufacturer
rml	1	73	ocml	model
rml	1	74	ocml	model.ext
rml	1	75	ocml	unit.of.measure
rml	1	76	ocml	level
rml	1	77	ocml	sequence
rml	1	78	ocml	neg.level
rml	1	79	ocml	neg.seq

Map Name	Sequence	Position	File Name	Field
rml	1	80	ocml	unit.cost
rml	1	81	ocml	labor.hours
rml	1	82	ocml	labor.cost
rml	1	83	ocml	labor.overtime.hours
rml	1	84	ocml	labor.overtime.cost
rml	1	85	ocml	tax.code
rml	1	86	ocml	tax.rate
rml	1	87	ocml	tax.amount
rml	1	88	ocml	modelv.no
rml	1	89	ocml	vendor
rml	1	90	ocml	vendor.part.no
rml	1	91	ocml	vendor.contract.no
rml	1	92	ocml	vendor.contact
rml	1	93	ocml	vendor.dt
rml	1	94	ocml	payment.freq
rml	1	95	ocml	payment.terms
rml	1	96	ocml	no.of.payments
rml	1	97	ocml	payment.amount
rml	1	98	ocml	discount
rml	1	99	ocml	discount.amt
rml	1	100	ocml	total
rml	1	101	ocml	warehouse
rml	1	102	ocml	logical.name
rml	1	103	ocml	rma.no
rml	1	104	ocml	asset.no
rml	1	105	ocml	current.location
rml	1	106	ocml	warranty
rml	1	107	ocml	request.number
rml	1	108	ocml	cm3.access

Map Name	Sequence	Position	File Name	Field
rml	1	109	ocml	target.completion
rml	1	110	ocml	target.order
rml	1	111	ocml	actual.order.lead
rml	1	112	ocml	foreign.id
rml	1	113	ocml	contact.name
rml	1	114	ocml	location
rml	1	115	ocml	license.number

APPENDIX A

Pre-Implementation Planning

This appendix provides a synopsis of planning considerations for implementation of a Request Management system. It should be considered a foundation tool for initial planning, to be detailed in conjunction with technical consulting services.

This appendix covers the following topics:

The Catalog

The Request Management application is based on the concept of a catalog. A catalog, or list of parts and services, is created containing all the items that a requestor might order. This would include request categories, master categories, and line items, such as a new phone, move/add/change of a PC, and a new logon ID.

The Catalog contains all the items that users can conceivably request, including request category packages, such as *Employee Office Move* or whether they directly request add something to their order at a later time.

Catalog line items require detailed definitions, such as specific model numbers, prices, and delivery lead times. Other items that can be tracked include descriptions, vendors, and approval requirements. The Request Management system can only be as detailed as the Catalog entries. If it is necessary for cable drops, labor related items, training, etc., to be part of a quote, they must be defined to the Catalog.

A feature of the Catalog is the ability to group items in commonly ordered *bundles*. For example, a common desktop workstation might be identified as a 133MHz Pentium with a 2GB hard drive, 15" monitor, 8X CD-ROM, 16MB RAM, etc. The requestor could then just order a *Standard Workstation* rather than the individual components. On the other hand, you may also want to give the requestor the option of changing components or ordering just an individual component. This is true of services as well, such as. a *New Employee Office* request that may consist of a new phone connection, a LAN drop, a standard workstation, and a telephone.

Master Catalog Sections

Think of these as being the sections in the mail order catalog you receive at home, such as men's clothing, women's clothing, furniture, hardware, and kitchen items.

Within each master catalog section, the groups are further subdivided into line item categories.

Structure of the Catalog

Master Catalog Section	Description	Line Item Category
PC & Peripheral	Personal Computers and Supplies	PC
		PC parts
Pager	Pagers	pager
		pager parts
Phone	Office Phones and Accessories	phone
		phone parts
Security	IDs and Sign-on Needs	security

An entry in the catalog (such as High End PC) may be subdivided into further component entries (the *bundles* previously referenced). These entries are also items in the catalog. When an order is placed, the top-level item (considered a Parent item, and possibly a place-holder phantom item) is ordered. The requestor does not need to know any more about the line item than that. If the catalog item has been identified as being a bundle of lower level components, or Children items (also in the catalog), those items will automatically be broken out on the request. Each component then becomes a separate line item with its own costs and delivery dates.

The following table describes an example of a catalog entry.

Relationship	Part No	Catalog Name
Parent	1	High End PC
Child	8	Pentium 200 MHz CPU, 24 MB RAM
Child	12	17” Monitor
Child	25	Keyboard
Child	87	Mouse

When the customer requests a High End PC, all the underlying components are ordered and processed as line item entries.

A customer may also order the 17" Monitor as a separate line item. Each entry is a catalog item in its own right.

Building the Catalog

To create the catalog, identify the parts and services that people request. If you wish to break the catalog entry down into further items, create an entry for each one and consider which part will serve as the Parent item of the individual components.

Required Information

Description of the entry
Catalog Line Item
Model
Manufacturer
If this is a sub-component, what catalog item(s) is a parent?
Should this item generate an order?
Should this item create separate line items for quantity orders?
Are there any limits on the quantity that may be requested?
Who should approve this item?
If this is one of several sub-components of another Parent part, should the requestor be able to substitute a different item?
How should this item be ordered? Batch or Immediate?
Is this item serialized?

Vendors

The vendors may be either external suppliers or internal departments. Please fill in at least the first 7 items. You may have as many vendors as you need.

Vendor Information

Catalog Description
Vendor Name
Vendor Part No.

Vendor Information
Transaction Type (purchase, lease, etc.)
Cost (in $)
Labor Hours
Labor Cost/Hour
Lead Time
Overtime Cost/Hour
Payment Frequency
No. Of Payments
Billing Code
Shipping Terms
Vendor Contract No.
Priority
Type of Order (purchase, lease, return, rental, work)
Warranty
Discounts

Approvals

Approvals give controlling authorities (Approval groups) the responsibility of costs and risks associated with a request, the ability to stop work, and to control when certain work activities can proceed.

- Which categories of catalog items require approvals?
- Which catalog items require approvals?
- What are the Approval groups?
- Who is in each group?

Category	Item	Require Approval?	Approval Group Name	Approval Group Members
PC Parts	Pentium 200 MHz CPU, 24 MB RAM	Yes	IT Supervisor	Cathy Jones, Al Smith
	Pentium 100 MHz, CPU, 16 MB RAM	No		
	17”	Yes	IT Supervisor	Cathy Jones, Al Smith
	15” Monitor	No		
	Ergo Natural Keyboard	Yes	IT Supervisor	Cathy Jones, Al Smith
	Win95 Keyboard	No		
	Microsoft Mouse	No		
	8X CD	No		
	3 1/2” Floppy	No		
	3COM NIC Card	No		
	9600 bps Modem	No		
	Microsoft Office Suite	No		

Phases

Phases are administrative steps in the life cycle of a Quote. Typically, Request Management is configured for three phases: User Entry, Coordinator, and Ordering. The intent for these is:

- **User Entry**. During this phase, the average user can access the Quote and change information on it, such as the client making the request, items requested, and requested delivery date.

- **Coordinator**. During this phase, the coordinator can replace the user's request for generic items with specific items and add detailed information to both the line item and the Quote. It is assumed that the coordinator will be responsible for gathering enough information to bill for the items and deliver them properly.
- **Ordering**. During this phase, items are passed to ordering, and the actual order is generated.

Some considerations for phase definitions include:

- Are these phase names acceptable?
- What requirements are there before closing a phase and opening the next?
- Should users who do not have update capability in a phase have browse capability at that phase?
- What is the administrative lead time at the Coordinator phase?
- How long does it take for the coordinator(s) to review a user's request and process it into an order?

User Data Entry

Perhaps the requestor will be required to enter a minimal amount of data during the User Entry phase. For instance, the requestor would enter contact information, location, and type of request on a description form.

Coordinator Data Entry Fields

The request would then be routed to a *coordinator* who will contact the requestor for specific information. Think about these specifics when answering the following questions:

- What information do you need from the requestor for each catalog item you have previously identified?
- What fields must be validated in a certain format, and which must be validated to exist in a supplementary table?

Some data items will be defined as coming from another table. A common example of this is contact information.

During the process of opening a Quote, the coordinator may be required to supply the first and last names of the individual requesting an item.

- Should this information be checked against the contacts table?
- What should be done if the individual is not yet in the contacts table?

Order Process

- How often will orders be generated?
- Will orders be combined to minimize paperwork given to vendors?
- What are the basic criteria to batch line items and create new Orders?
- How will Request Management interrelate with any external purchasing system already in use? If you use Get.It! Resources, you won't need to order through Request Management, but access Get.It! Resources through the convenient button icons located within Request Management.

Notifications and Alerts

- What events will generate notification and alerts?
- For each event, who will be notified (typically the approver of something)?
- For each event, what manner of notification will be used (for example, pager, e-mail, or fax)?
- The alerts to be defined in the system?

Category	Event	Notify: (approval group)	By: (pager, e-mail, etc.)
Pager	Pending approval > 24 hrs.	IT Supervisor	e-mail
	Not closed > 2 weeks	IT Supervisor	e-mail

Closing a Quote

- How will customer follow-up be handled?
- Will the operators doing follow-ups close the Quotes?
- What information needs to be collected at completion time?

Closing and Receiving Order Line Items

- Who will enter receipt information into Request Management when parts arrive at the receiving dock? Remember, if you use Get.It! Resources, you do not need to receive items into Request Management.
- How will Inventory be updated by this information?
- Will scripts be used when technicians close order line items for work/service/labor after their task is completed?

Trickles/Bumps/Retiring

- What is the inventory trickle process?
- Who determines where the old device goes?

Profile Definition

Generally, the standard user will have minimal direct access to Request Management. This user will have limited data views and limited options within the module. It is best to begin with a more restricted system and expand the options over time, rather than provide an open system and rescind permissions and accessibility to the product options at a later time.

Inventory/Reporting/Auditing

Inventory

- Are there plans for posting received inventory information into the inventory tables?
- Is there a schedule in place for when this plan will be implemented?

Reporting

- Are there specific reporting requirements?
- Will the reports be scheduled or *on demand* reports? Will Request Management meet the reporting requirements defined in the customer's design document?

Auditing

- Which fields will be audited?
- Who will maintain the audit records?
- What are the reasons behind selecting to audit fields as opposed to tracking entire records via paging?

Process Validation

There is a need to validate the implementation of Request Management to your office's expectations. Changes may be required in both the tool and the process to meet the your office goals. You need to determine what you want to accomplish and how Request Management will meet those requirements.

- Does your office's process make sense in relation to the Request Management tool?
- Does Request Management make sense in relation to your office's best practices and process?

APPENDIX B

Link Records

You can copy data from different data records to a line item via a standard link record. Request Management checks for the following link records for the indicated process

Note: The following are the Request Management link records which should be modified according to any renaming of Request Management files or forms.

Link Name	From	To	When Used
ocml.copy.quote	ocmq	ocml	When opening a line item from a quote
ocml.copy.order	ocmo	ocml	When opening a line item from an order
ocml.copy.model	model	ocml	When opening a line item from a catalog part
ocml.copy.modelvendor	modelvendor	ocml	When opening a lien item from a catalog part and the user selected a *vendor*
ocml.receive.copy	ocml	ocmlrec	When receiving process copies data from the line item to the receiving log

If found, Request Management copies data from the source record to the line item based on the data fields defined at the detail level of the first element in the appropriate link record.

Do not use these link records for any other purposes. Request Management always uses the first element of the link record for copying data from the source record to the line item. It does not examine any other link elements.

For more information on how to use link records and the roles played by link records, see the *ServiceCenter System Tailoring Guide*.

C Macros

APPENDIX

There are no specific macros for Request Management. The standard macro options are available through the Macro Lister application. These can be set up to create actions from within Request Management. The standard options include:

- Fax 1 Assignment Group
- Fax 1 Person
- Fax Many People
- Mail 1 Assignment Group
- Mail 1 Person
- Mail Many People
- Page 1 Person
- Page Many People
- Page an Assignment Group

To reach the Macro Lister:

1 Click **Incident Management** from the ServiceCenter home menu.

If you have administrative rights, the **Security Files** button is available on the Incident Management Menu tab.

2 Click **Security Files**.

3 Click **ML** (Macro List) from the Security Files tab on the Incident Management Security Administration Utility screen.

4 From the Macro Lister screen that is displayed, click **Add** (+) to call the Macro Editor and define a macro for use in Request Management.

Click the down arrow to display a list of available macro types.

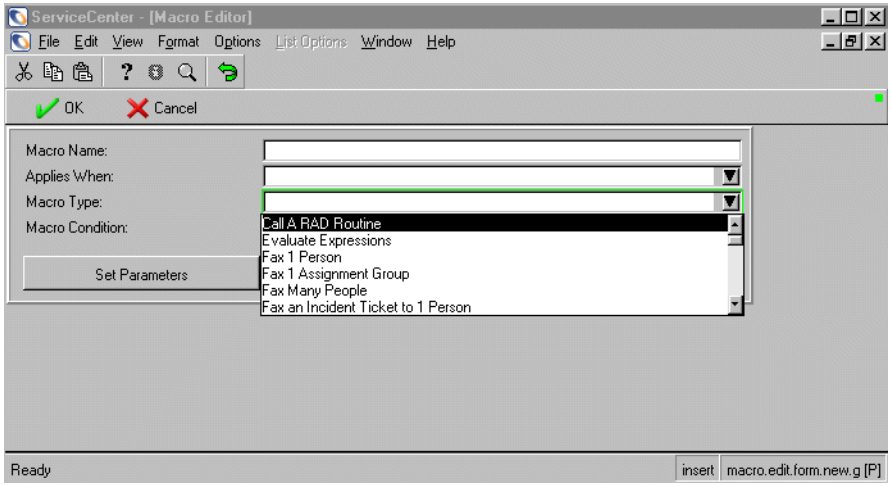

Figure C-1: Selecting A Macro Type

See the *ServiceCenter Tailoring Guide* for more information on macros, Macro Lister, and the Macro Editor.

Glossary

The following table describes frequently used terms.

Term	Definition
Alerts	A series of checkpoints taken against a Quote or Order to ensure that required work activities occur within specified time frames.
Approvals	A list of groups that must acknowledge or accept the risk, cost, etc. associated with a specific Quote/Order and their associated Line Items. Approvals give controlling authorities the ability to stop work and to control when certain work activities can proceed.
Area	A code that designates a level of processing or a record type. The codes are: ■ Quotes—q ■ Orders—o ■ Line Items—l
Catalog (*model* file)	File that contains the definitions that support the various parts and services which customers may order.
Categories	The major logical classification of Quote/Order/Line Items.
Dependency Type	The catalog creates dependency types by defining an item's components and their grouped order. When a quote is created and items are grouped, then those items are ordered according to their dependency type within the group.
Event	The occurrence of a specific detectable action or condition.

Term	Definition
Group	One or more operators assigned to a common area of responsibility. Typically, each group reflects a business or technical area (or department). Certain operators are designated as having approval authority for these groups.
Grouped	Similar items are grouped in the catalog under a common name. The primary grouping for catalog items.
Line Items	A detailed record that defines part information such as cost, vendor, vendor part number, billing and shipping information, tax codes, and descriptions. Line Items are subordinate to Quotes and Orders.
Modelvendor	A file that defines the vendor for each item in the catalog.
Order	A high level record that defines the basic ordering information such as assignee, vendor, required dates, coordinator and description. An Order does not contain detailed part information.
Part	A specific item that can be ordered by customers. It can have parent-child relationships with other parts.
Phase	An administrative step in the cycle of a Quote or Order. Each category must have at least one phase defined in the category specification, and may have any number of phases defined (except Lien Item categories, which have only one defined Phase).
Profile	The security record that defines which options are available for each Request Management operator or group.
Quote	A high level record that defines the basic request information such as requestor, required dates, coordinator and description. A Quote does not contain detailed part information.
Receiving Log	A file that tracks the date/time, operator, serial number and quantity for the receipt of physical items.
Vendor	The entity who delivers the physical purchase items or performs the actual work/service items. Vendors can be internal or external to the organization.

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