

Expense Management

Work Order

Installation Guide

NEC NEC Corporation

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Introduction

Chapter Topic • [Expense Management Overview](#)

The *Expense Management Work Order Installation Guide* defines the installation requirements and step-by-step instructions for the installation and set up of the Expense Management Work Order application.

The *Expense Management Work Order* application is an Expense Management Enterprise add-on. The prerequisites that apply to Expense Management Enterprise also apply to Expense Management Work Order application.



NOTE

Expense Management Work Order Installation Guide assumes that Expense Management Enterprise has, as a minimum, Patch 42 applied.

Expense Management Overview

Expense Management provides an integrated, scalable IT management solution for businesses of almost every size and market segment. Organizations can become more productive using its tools to effectively manage IT operations and services while controlling IT-related expenses. Features include:

- **Integration with Back Office Accounting Systems** - Expense Management seamlessly integrates with back office accounting systems to provide detailed reports of voice and data use. The information provided can be used in compliance reports, to properly attribute time to specific customers, and for other budgeting purposes. Invoice management integrates with accounts payable to provide payment commands and receive paid transaction numbers.
- **Improving Customer Service** - Provides the tools to manage IT services such as usage, routing and scheduling, Expense Management enables enterprises to improve customer service. Customer registration and organization tools are offered, and registered customers can be assigned relevant services and resources. Customers are served with speed and accuracy, and customers' satisfaction with those services improves.

- **Monitoring Performance and Controls Expense** - Invoice management provides an ultimately accurate inventory list, facilitates term simulations and best-package allocation, identifies policy abuse and erroneous charges, and enables accurate bill-back of organizational units and convergent invoice issuance to employees. The policy-planning module implements and monitors real time performance and system usage based on policies and criteria defined by the organization.
- **Working for Organizations of Any Size** - Powerful, scalable and totally secure, Expense Management can handle jobs of nearly any size; it works as well for a global corporation's multiple high-traffic, heavy-volume sites as it does for a small organization with minimal traffic. It also provides multi-vendor PBX support and additional inputs including online mobile call detail records.
- **Supporting Business Growth** - The system's modular architecture supports the ongoing expansion of system functionality. Additional modules may be added based on customer request. The application is designed around a multi-tier processes, queues and services architecture, which offers the benefit of distributing loads across multiple servers and provides growth opportunities and flexibility.

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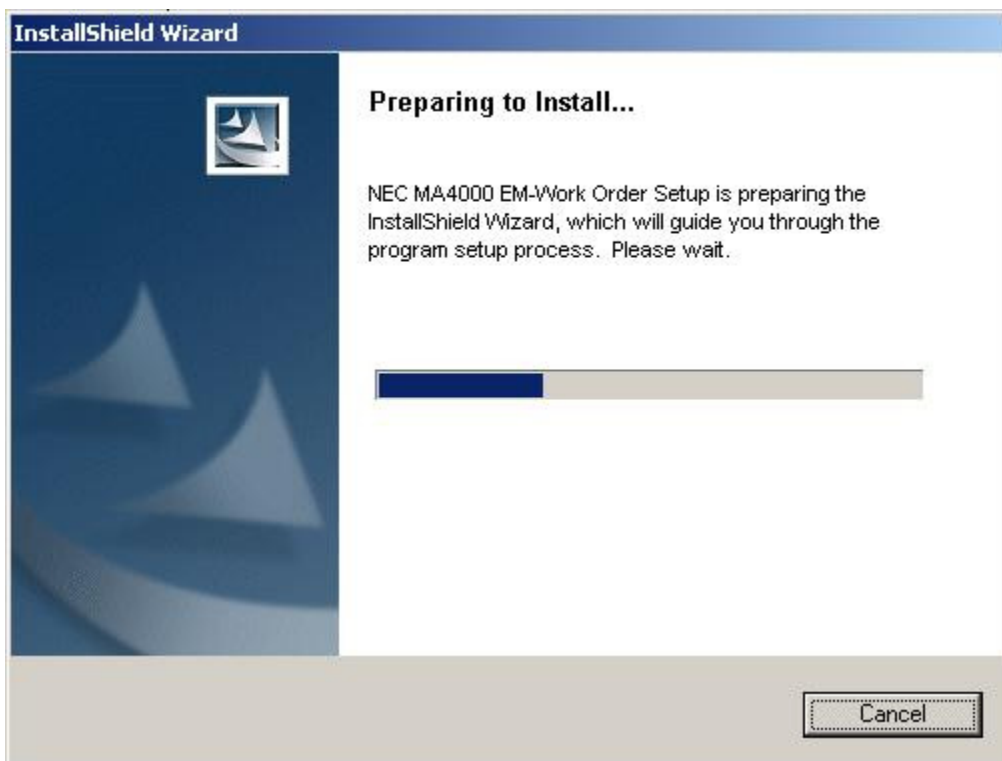
Installation

- Chapter Topics
- [Installing the Work Order Application](#)
 - [Opening the Work Order Application](#)
 - [Using the Work Order Application](#)

Installing the Work Order Application

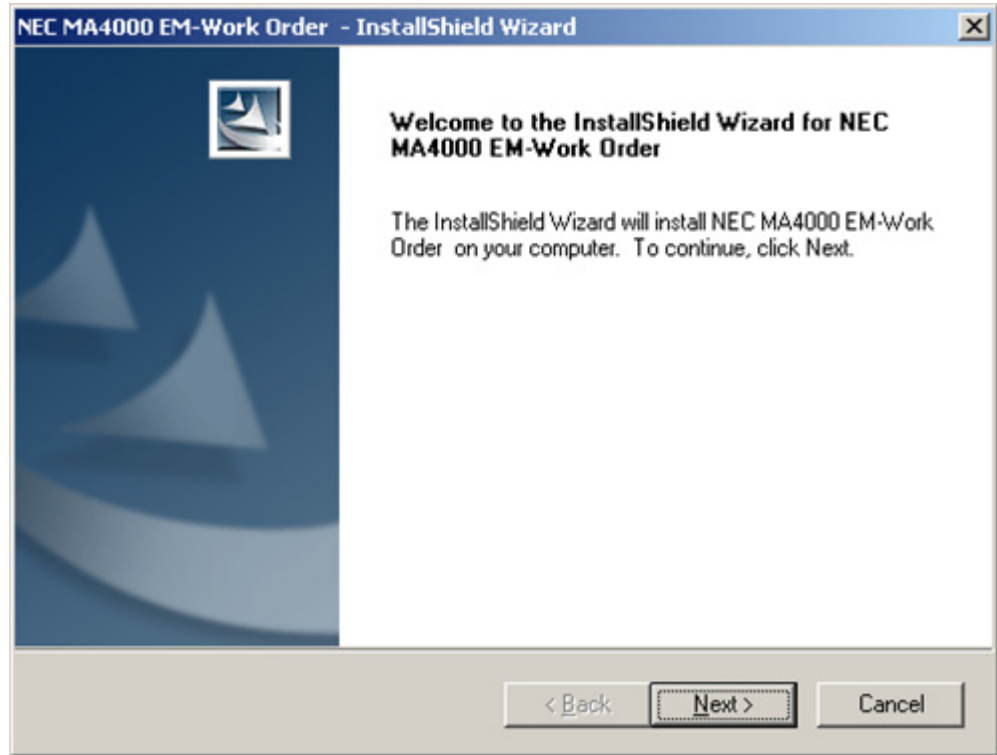
- Step 1** Launch the Work Order installation using the link on the page that is automatically run from your installation DVD.
- Step 2** The InstallShield Wizard opens and checks the operating system version. [Figure 2-1](#) displays.

Figure 2-1 NEC MA4000 EM-Work Order - InstallShield Wizard - Preparing to Install



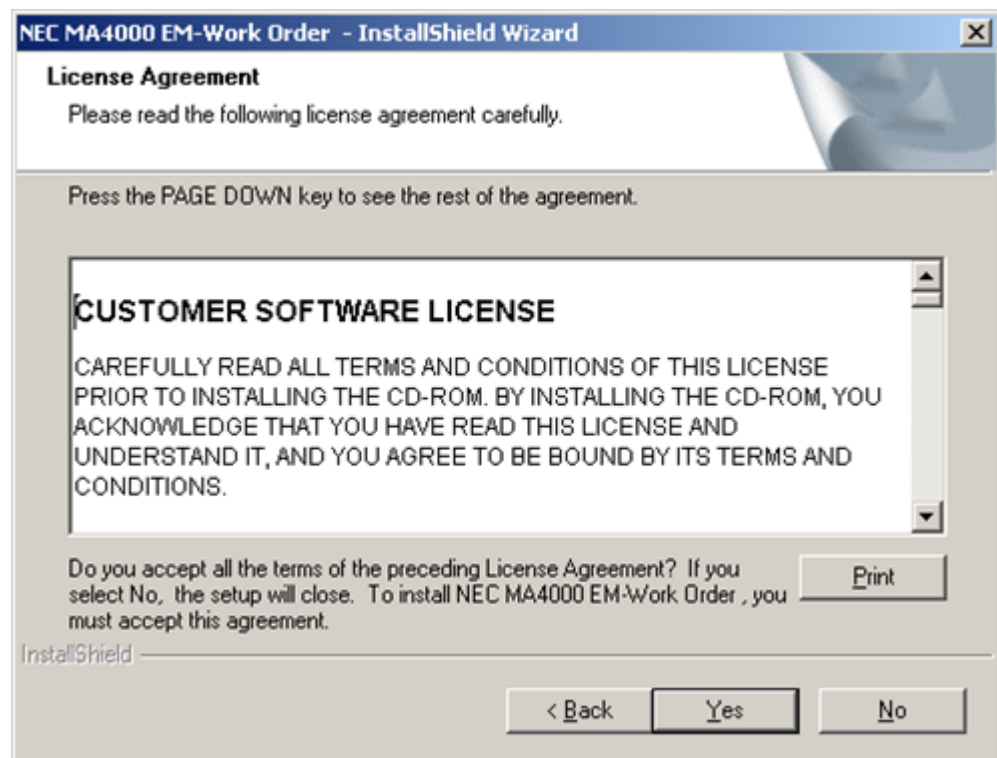
—If no problems are encountered, installation automatically continues. See [Figure 2-2](#).

Figure 2-2 NEC MA4000 EM-Work Order - InstallShield Wizard - Welcome



Step 3 Click **Next**. [Figure 2-3](#) displays.

Figure 2-3 NEC MA4000 EM-Work Order - InstallShield Wizard - License Agreement



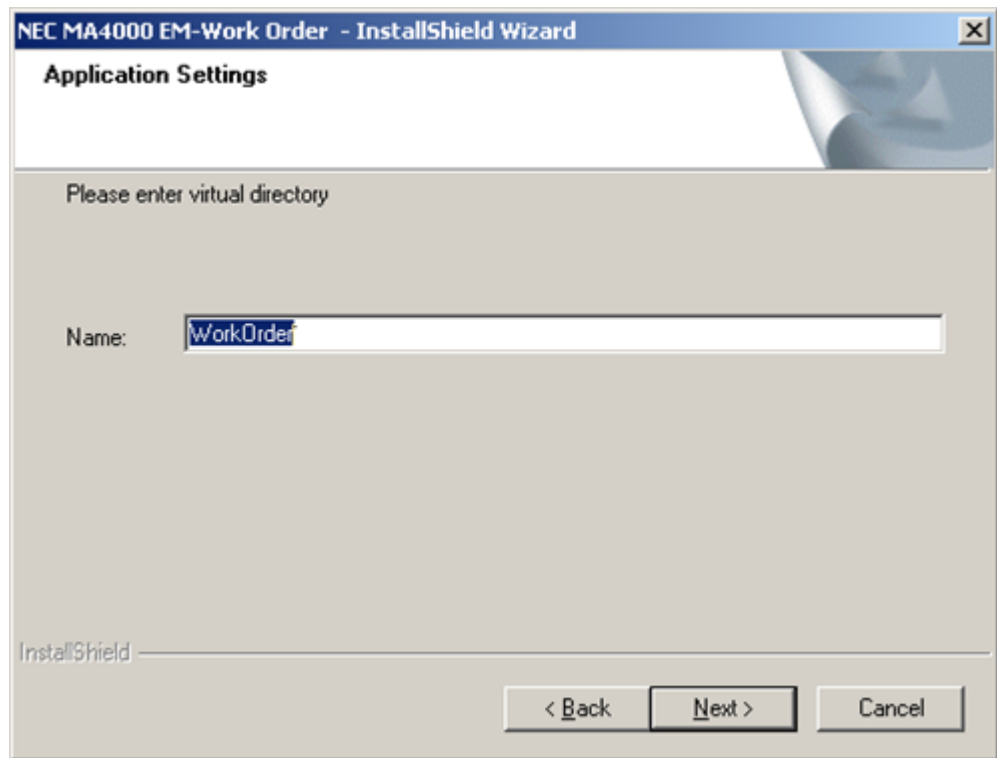
—Click **Print** to obtain a copy of the License Agreement for your records.

Step 4 To continue the installation, you must accept the License Agreement. Do one of the following:

—To decline the License Agreement terms and close the setup, click **No**.

—To accept the License Agreement terms and continue the installation, click **Yes**. [Figure 2-4](#) displays.

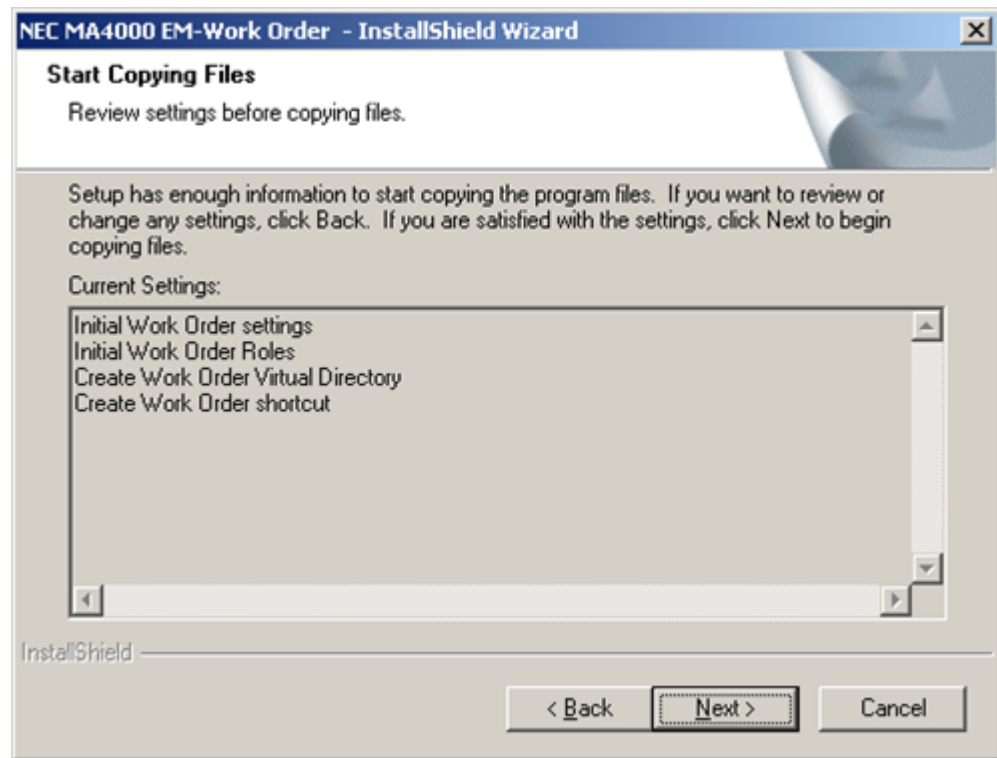
Figure 2-4 NEC MA4000 EM-Work Order - InstallShield Wizard - Application Settings



—The default Work Order virtual directory name is **WorkOrder**. You can accept the default name or change the directory name to any name you want.

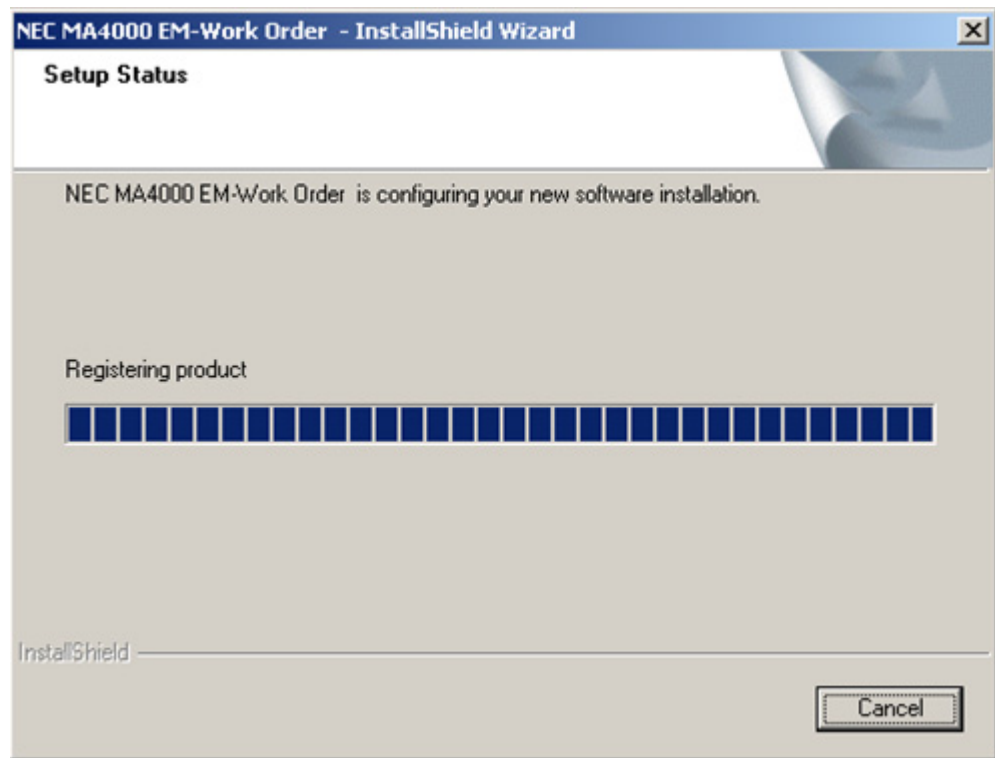
Step 5 When satisfied with the virtual directory name, click **Next**. [Figure 2-5](#) displays.

Figure 2-5 NEC MA4000 EM-Work Order - InstallShield Wizard - Start Copying Files



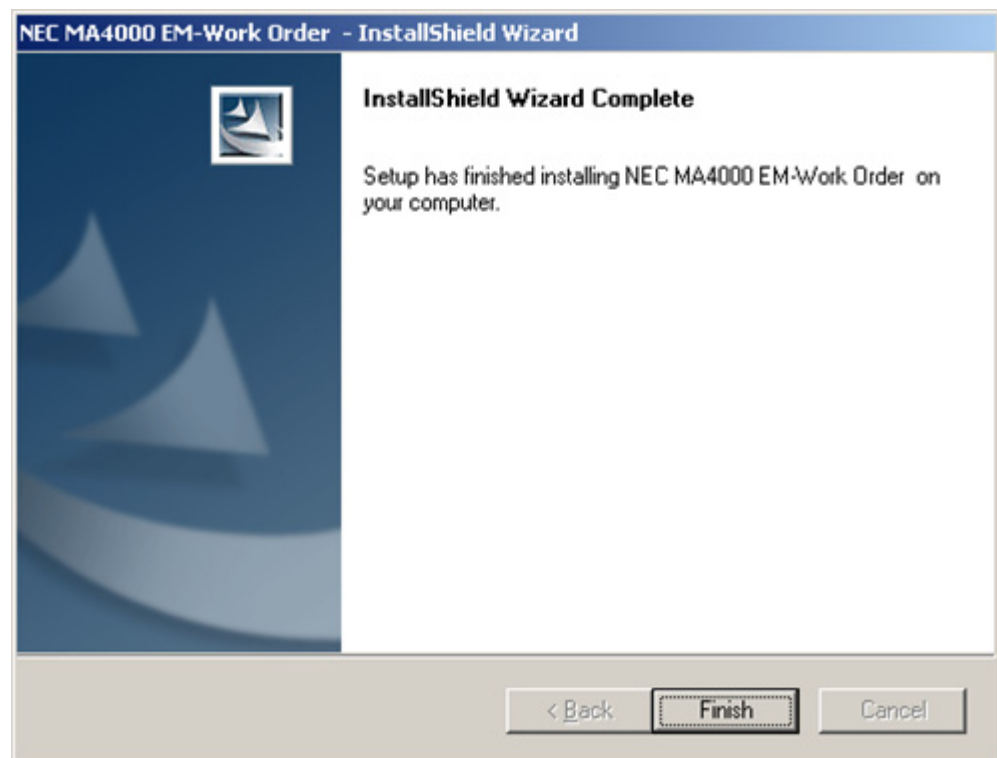
- Step 6** Check the current settings.
- Click **Back** if you want to change any of the settings.
 - Click **Next** if you are satisfied with the settings and wish to continue with the installation. [Figure 2-6](#) displays.

Figure 2-6 NEC MA4000 EM-Work Order - InstallShield Wizard - Setup Status



- The installation process begins. The blocks displayed below **Registering product** indicate the installation progress.
- [Figure 2-7](#) displays when the installation is complete.

Figure 2-7 NEC MA4000 EM-Work Order - InstallShield Wizard - Wizard Complete



Step 7 Click **Finish** to close the InstallShield Wizard.

Opening the Work Order Application

The installation process added the Work Order application to your program files and created a shortcut icon of the Work Order application on your Desktop. To open the Work Order application do one of the following:

Step Double-click the **Work Order** Icon located on your Desktop.

OR

Click **Start** → **Programs** → **NEC EM** → **Work Order**

Using the Work Order Application

In order to use the Work Order Application:

- You must be defined as a Work Order User (or Administrator)
- The application must have at least one defined process

Defining Work Order Users

Step 1 In Expense Management, select **Org Utilities** → **Personnel** → **Edit Personnel**.

Step 2 Click the **User** tab.

Step 3 Define users as either a **Work Order User** or a **Work Order Admin**. There must be at least one user with administrator (**Work Order Admin**) permission.

Defining Work Order Processes

The Work Order application comes with at least one default **general purpose** process. However, to define effective processes for your organization, you must have a profound understanding of business processes in your organization, and the know-how necessary to define these processes in Expense Management.

Defining Work Order processes is done through Expense Management. It is the responsibility of the Work Order Administrator, and is beyond the scope of this document.

For additional information or support on this NEC Corporation product, contact your NEC Corporation representative.

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