PeopleSoft®

EnterpriseOne B73.3.1
Work Orders
PeopleBook

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Work Orders Overview

The J.D. Edwards Work Orders system is specifically designed to handle small, short-term tasks that might be a part of a major project. It is also designed for quick setup, simple cost accounting, and basic scheduling for projects that can be completed quickly. You can use the Work Orders system to keep these projects as organized and well managed as your long-term projects.

System Integration

The Work Orders system complements the Job Cost system. While you rely on the Job Cost system for long-term projects in which budget comparisons and final cost projections are important, the Work Orders system is best suited for short-term projects with minimal transactions. In many cases, you can benefit from using both systems.

In addition to the Job Cost system, you can also link the Work Orders system to other J.D. Edwards systems. For example, you can link to the Payroll system to record charges against work orders and conduct detailed time reviews of work orders by project, person, and detailed task. You can also link to the Inventory Management system to allocate parts and supplies to work orders.

The Work Orders system works closely with the following J.D. Edwards systems:

- Address Book
- General Accounting
- Payroll and Time Accounting
- Inventory Management
- Procurement
- Accounts Payable
- Equipment/Plant Management *
- Job Cost
- Service Billing

* Additional features and functionality are available for Work Orders in this system.

Features

The Work Orders system includes the following features:

- Paperless processing
- Quick creation of work orders
- Approvals for work orders
- Activity rules for work orders
- Quick location of work orders
- Simple budget and estimate controls
- Multiple control dates
- Multiple levels of responsibility
- Unlimited narrative remarks
- Project setup and tracking
- Flexible project management reporting

Paperless Processing

You can save paper as you track your work orders and projects with the Work Orders system. You enter work orders online and perform most of the subsequent processing without having to rely on printed documents.

Quick Creation of Work Orders

You can create a single work order or a group of work orders quickly and easily, with minimal pre-planning. To save time and reduce the possibility of errors, you can also use parent work orders and processing options when you set up work orders so that the system enters much of the information for you.

Approvals for Work Orders

You can establish approval controls for a work order based on a variety of criteria, including work order type, status, and the monetary amount involved. For example, you can specify that all maintenance work orders must be approved before any work can begin. You can also specify who must approve the work orders and the threshold monetary amount for which each person is responsible. The threshold is the amount above which the person specified must approve the work order. If the amount is less than the threshold, this person's approval is not required. You can also review the approval status of a work order.

Activity Rules for Work Orders

You can define work order activity rules that differ by work order type. You can use these rules to track a work order through its life cycle, review work orders that apply to certain procedures, and prepare reports that are based on a work order's current status. You can also define the flow of statuses (steps) that a work order must follow during its life cycle. In addition, you can also define the following:

- Whether the work order is active or inactive at a particular status
- Whether to lock the work order to prevent changes

Quick Location of Work Orders

You can use the Scheduling Workbench to easily locate a work order using a variety of information. For example, you can review all the work orders that are assigned to a particular person, location, or project. You can limit your search for a work order by using any combination of the following information:

- The job or business unit
- The address book numbers of the originator, customer, manager, or supervisor
- The life cycle status of a work order
- Any combination of the user defined category codes
- The type of work order
- The priority assigned to a work order

Simple Budget and Estimate Controls

You can use the Work Orders system to track the simple estimate and budget requirements of a work order. For example, you can enter budget information on Enter Work Orders, then track the information from both Scheduling Workbench and Cost Accounting. In addition, you can use a variety of reports to compare estimates with actual information.

Multiple Control Dates

You can track each work order according to control dates that you define. You can define any of the following control dates:

- The transaction date (the date that a work order is entered into the system)
- The start date
- The planned completion date
- The actual completion date
- The assignment date (the date that the person who is responsible for the work receives the work order)

Multiple Levels of Responsibility

You can assign several levels of responsibility to each work order, such as:

- The job or business unit charged for the work order

- The originator of the work order
- The manager
- The supervisor

You can also use category codes to assign levels of responsibility to work orders.

Unlimited Narrative Remarks

You can describe work orders briefly using two or three words, or you can provide much more detail. You can also arrange work orders into groups and enter different types of information in each, such as:

- Expected actions
- Actual operations performed
- Tools required
- Procedures for completing the work

Project Setup and Tracking

You can create, organize, update, and track small projects and all of their associated work orders with ease and efficiency. You can manage projects according to the following information:

- The customer number
- The parent work order number (project number)
- The job or business unit

Flexible Project Management Reporting

You can manage projects using the following reports:

Cost Summary	This report provides cost summary information for work orders, such as estimated and actual costs.
Cost Detail	This report provides cost detail information for work orders, including individual transaction details.
Work Order Summary	This report provides summary information for work orders, such as hours planned and actual hours charged as of a specified date.
Detailed Task Description	This report provides detailed information about the work orders in a project.

Project Status Summary	This report provides summary and detailed status information for all work order projects that are assigned to a specific manager.

Work Order Tables

F0001 – Business Unit Security	Contains authorization for users of business unit information.
F0002 – Next Numbers	Assigns a unique number to each work order that you create.
F0005 – User Defined Codes	Stores valid user defined system codes and descriptions.
F0006 – Business Unit Master	Stores job and business unit information.
F0091 – Standard Procedures/General Message	Stores general instructions that relate to a work order.
F0101 – Address Book Master	Contains name and address information for the customer, manager, originator, and supervisor.
F0901 – Account Master	Contains the chart of accounts information.
F0902 – Account Balances	Stores balances by account and by work order. It stores information by ledger type and fiscal year.
F0911 – Account Ledger	Stores amount and unit information that is related to each work order. The work order information is stored as a subledger with a subledger type of W.
F4801 – Work Order Master	Contains one record for each work order. This table stores information about a work order, such as the description, estimated hours and amounts, responsibility, and costing information. It also stores planned start and end dates.
F4802 – Work Order Instruction	Contains one record per line of instruction. It stores description text and the various record types that are defined in the user defined codes, such as Description of Request and Final Disposition.

F4826 – Work Order Activity Rules	Stores activity rules that relate to a work order.
F4827 – Work Order Approval Routing	Stores reject status for workflow approvals.
F48001 – Work Order Default Coding	Stores default manager and supervisor codes for work orders, by category codes 01 through 03.
F48002 – Work Order Record Type	Contains the valid work order record types. It stores header information for the Work Order Instruction table.

Menu Overview

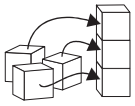
Work Order / Service Billing (G48)

Daily Processing (G4810)

- Work Order Processing (G4811)
  - Supplemental Data (G4813)
- Simple Project Management (G4812)

Advanced and Technical Operations (G4831)

- Update Phase/Equip No. in GL (R48802)
- Work Order Purge (R48900)



Work Orders Setup (G4841)

- User Defined Codes (G4842)

Daily

Work Order Creation

You create work orders to formally request work to be performed, such as maintenance. By creating a work order, you also communicate important information about a task or short-term project to others who are involved.

You must create a master record for every work order that you want to track in the Work Orders system. The master record consists of basic information that defines the work order, such as the work order number and description. You can also enter additional descriptive information to further identify the work order, such as special instructions.

You can create new work orders by entering all of the necessary information for those tasks that are unique. You can also create work orders by copying the information from existing work orders for those tasks that are similar to other tasks that you perform. In addition, you can create a project hierarchy of work orders for those tasks that are related to each other and subordinate to a larger task.

Work order creation consists of the following tasks:

- ❑ Creating work orders
- ❑ Copying parent work orders
- ❑ Creating work orders for a project

Creating Work Orders

Work orders communicate information about unique tasks to others who are involved. When you enter a work order, the system creates a master record. A master record must exist for every work order that you want to track in the Work Orders system. The master record includes basic information, such as:

- Work order number
- Brief description
- Category codes
- Charge-to business unit
- Type of work order
- Status of work order

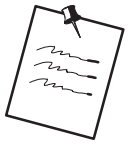
The system stores work order master records in the Work Order Master table (F4801).

You can use processing options to enter information for the type, priority, status, and category codes 1, 2, and 3. You can also use processing options to assign the manager and supervisor, if you defined them when setting up the system. See *Setting Up Default Managers and Supervisors*.

You can assign record types to a work order and then enter descriptive information into each record type, to note the specific details about the task. For example, you might want to include special instructions and the parts and tools that are needed to complete the task.

To further define the work orders in your system, you can enter supplemental data. Supplemental data is useful for reporting and tracking work order details that are not included in the record types.

You can also use a parent work order to create a work order. See *Copying Parent Work Orders*.



If you need to delete a work order, you cannot do so if it has any account ledger transactions associated with it, or if it is used as a parent work order. You can, however, inactivate a work order by entering a code in the Subledger Inactive field on Enter Work Orders.

Creating work orders consists of the following tasks:

- ❑ Entering basic work order information
- ❑ Entering record type descriptions
- ❑ Working with supplemental data

Before You Begin

- ❑ Before you create work orders, you must define your chart of accounts for the charge-to business unit information. See *Creating Your Chart of Accounts* in the *General Accounting Guide*.

Entering Basic Work Order Information

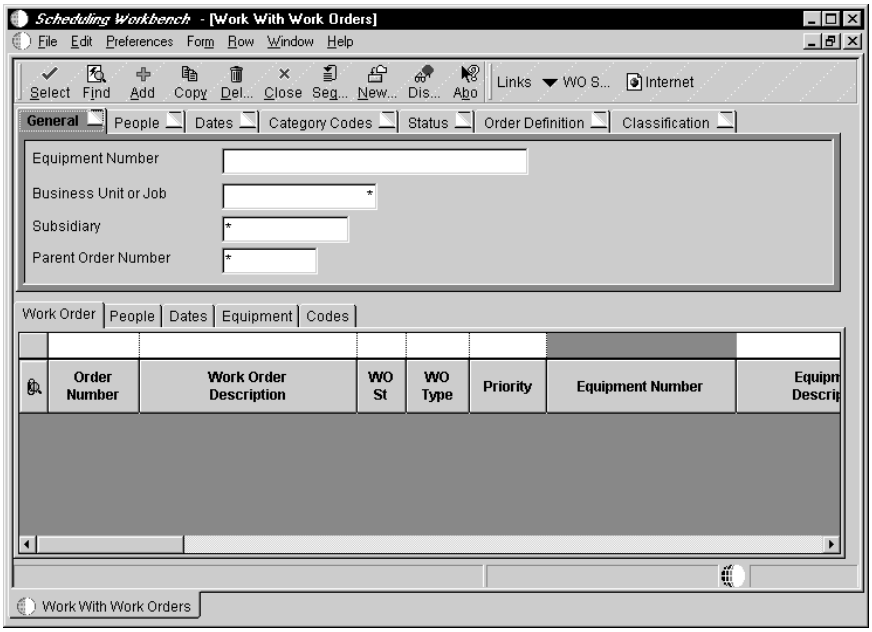
Depending on the complexity of your organization, you can create work orders that include only the most basic information required by the system, such as the description and business unit. Or you can include a variety of explanations, scheduling dates, and control codes. You can also enter budgeting information to help you track costs and resources.

▶ To enter basic work order information

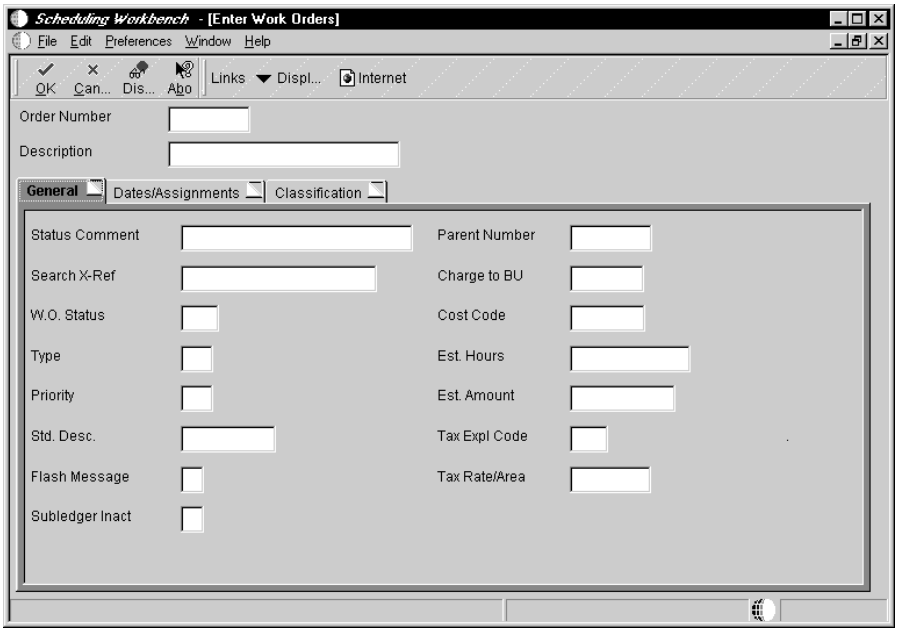
From the Work Order Processing menu (G4811), choose Scheduling Workbench.

Alternatively, from the same menu, you can choose Work Order Entry to enter work order information.

On Work With Work Orders



1. Click Add.



2. On Enter Work Orders, complete the following field:
   - Description
3. On the General tab, complete the following field:
   - Charge to BU

4. Complete the following optional fields:
    - Status Comment
    - Search X–Ref
    - W.O. Status
    - Type
    - Priority
    - Std. Desc

      You can use the Standard Description user defined code to assign standard procedures or instructions to multiple work orders.

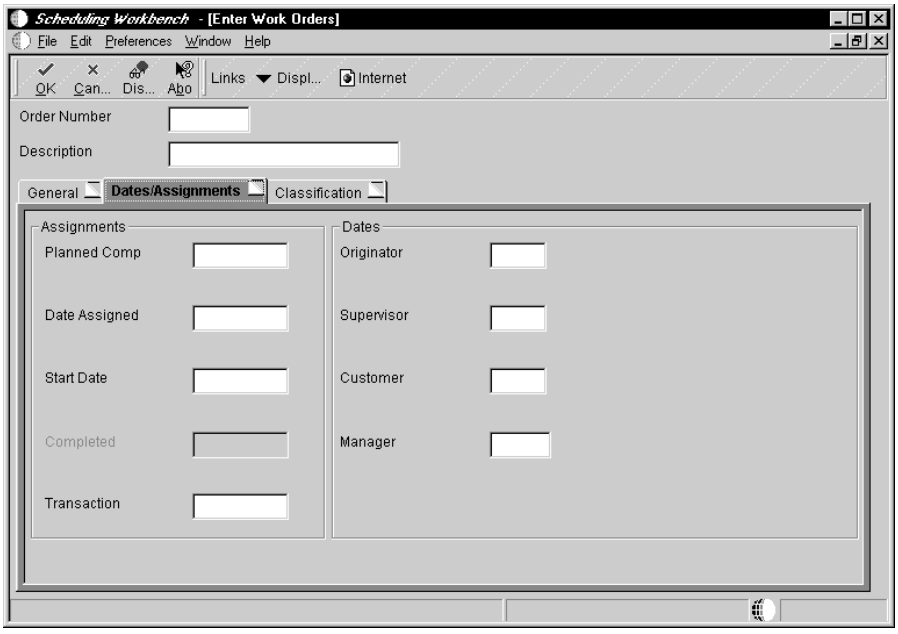
    - Flash Message
    - Subledger Inact

      Note that you cannot delete a work order it if it has any account ledger transactions associated with it, or if it is used as a parent work order. You can, however, make a work order inactive by entering a code in the Subledger Inactive field.

    - Parent Number

      The parent number default is the work order number.

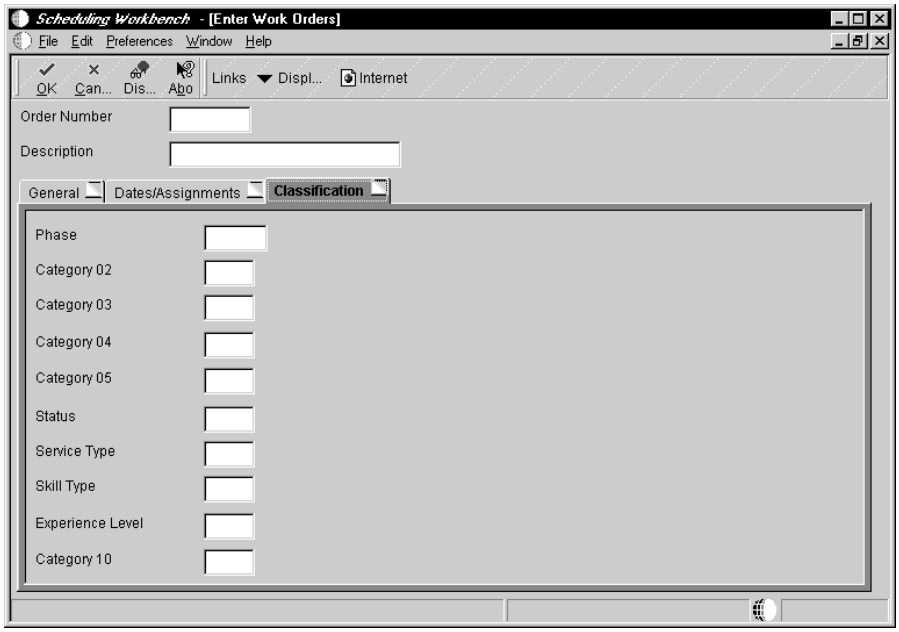
    - Cost Code
    - Est. Hours
    - Est. Amount
    - Tax Expl Code
    - Tax Rate/Area
5. Click the Dates/Assignments tab.



6. Complete the following optional fields:
   - Planned Comp
   - Date Assigned
   - Start Date
   - Transaction
   - Originator
   - Supervisor

     You can enter address book numbers to track originator and supervisor information for a work order. You can set up your system to automatically enter the address book number of the supervisor for work orders. See *Setting Up Default Managers and Supervisors*.

   - Customer
   - Manager
7. Click the Classification tab.



8. To assign category codes to work orders, complete the following optional fields and click OK:
   - Phase
   - Category 02
   - Category 03
   - Category 04
   - Category 05
   - Status
   - Service Type
   - Skill Type
   - Experience Level
   - Category 10

Field	Explanation
Charge to BU	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant. Business unit security can prevent you from locating business units for which you have no authority.
Status Comment	A brief description to explain the status of the work order.

Field	Explanation
Search X–Ref	An alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.
W.O. Status	A user defined code (00/SS) that describes the status of a work order or engineering change order. Any status change from 90 thru 99 automatically updates the date completed.
Type	A user defined code (00/TY) that indicates the type classification of a work order or engineering change order. You can use work order type as a selection criteria for work order approvals.
Priority	A user defined code (system 00, type PR) that indicates the relative priority of a work order or engineering change order in relation to other orders. A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work order you create on those forms and on the Project Setup form. You can either accept or override the default value.
Std. Desc	A user defined code (system 48, type SN) that is assigned to a standard note, message, or general narrative explanation. You can use this code to add instructional information to a work order. You set up codes for this field on Standard Description.
Flash Message	A user defined code (system 00, type WM) that indicates a change in the status of a work order. The system indicates a changed work order with an asterisk (*) in the appropriate report or inquiry form field. The flash message is highlighted in the Description field of the work order.
Subledger Inact	A code in WorldSoftware, or an option in OneWorld software, that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive. Examples are jobs that are closed, employees that have been terminated, or assets that have been disposed. If a subledger becomes active again, set this field back to blank. If you want to use subledger information in the tables for reports but want to prevent transactions from posting to the master record, enter a value other than blank in this field.

Field	Explanation
Parent Number	This is the parent work order number. You can use this number to: • Enter default values for newly added work orders, such as Type, Priority, Status, or Manager. • Group work orders for project setup and reporting. . . . . . *Form-specific information* . . . . . You can copy information from a parent work order to create a new work order. On the new work order, you need to complete some fields for unique information. If you leave the remaining fields blank, the system completes them with values from the parent work order.
Cost Code	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.
Est. Hours	The estimated hours that are budgeted for this work order.
Est. Amount	The estimated dollar amount that is budgeted for this work order.
Tax Expl Code	A user defined code (system 00/type EX) that controls how a tax is assessed and distributed to the G/L revenue and expense accounts.
Tax Rate/Area	A code that identifies a tax or geographic area that has common tax rates and tax distribution. You must define the tax/rate area to include the tax authorities (for example, state, county, city, rapid transit district, province, and so on) and their rates. In order for the codes to be valid, you must set them up in the Tax Rate/Area file.
Planned Comp	The date the work order is planned to be completed.
Date Assigned	The date the person responsible for the work order receives the work order.
Start Date	This is a start date for the work order or engineering change order. You can enter the date manually or let the system enter it for you. If the work order is associated with a parent work order, the system enters the start date from the parent work order. If there is no associated parent work order, the system enters the system date.
Transaction	The date that a specific order was entered into the system. You can enter a date in this field. The default value for this date is the system date.
Originator	The address book number of the person who originated the change request.

Field	Explanation
Supervisor	The address book number of the supervisor. Note: A processing option for some forms allows you to enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers & Supervisor form. After you set up the default values and the processing option, the information displays automatically on any work orders that you create if the category code criterion is met. You can either accept or override the default value.
Customer	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other address book members.
Manager	The address book number of a manager or planner. Note: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the information displays automatically on any work orders that you create if the category code criterion is met. (You can either accept or override the default value.)
Phase	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time. Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
Category 02	User defined code system 00, type W2, which indicates the type or category of a work order. Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)
Category 03	User defined code system 00, type W3, which indicates the type or category of a work order. Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)

Field	Explanation
Category 04	User defined code system 00, type W4, that indicates the type or category of a work order.
Category 05	The type or category of work order.
Status	A user defined code (system 00, type W6) that indicates the status of the work order.
Service Type	A user defined code (system 00, type W7) that indicates the service type for the work order.
Skill Type	The type or category of work order.
Experience Level	The type or category of work order.
Category 10	The type or category of work order.

Entering Record Type Descriptions

Record types contain specific details about work order tasks. After you enter the basic work order information, you can enter these details in the record types that are assigned to the work order. For example, you might want to include an extended description of the task in record type A, special instructions in record type B, the parts and tools that are needed in record type C, and so on.

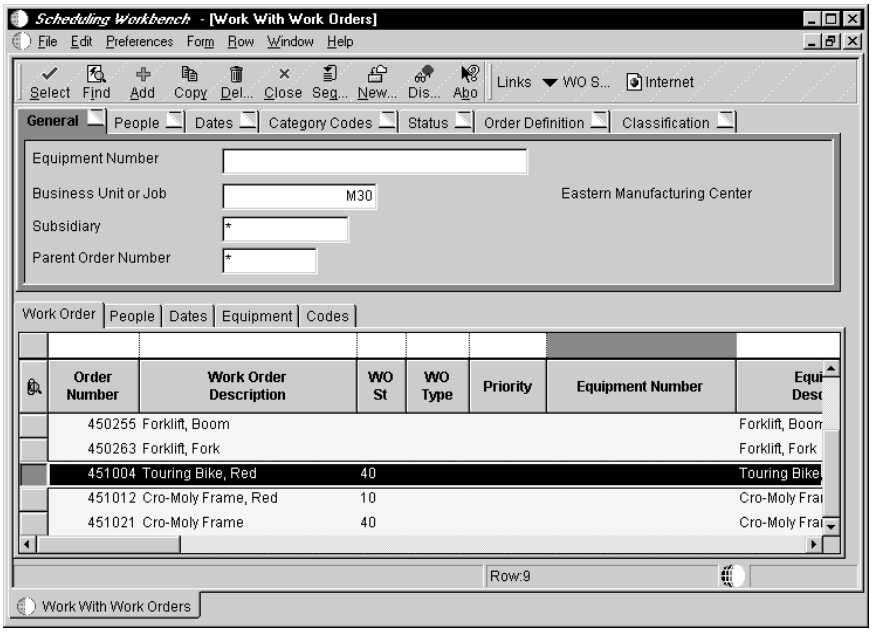
See Also

- *Setting Up Formats for Record Types*

▶ To enter record type descriptions

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

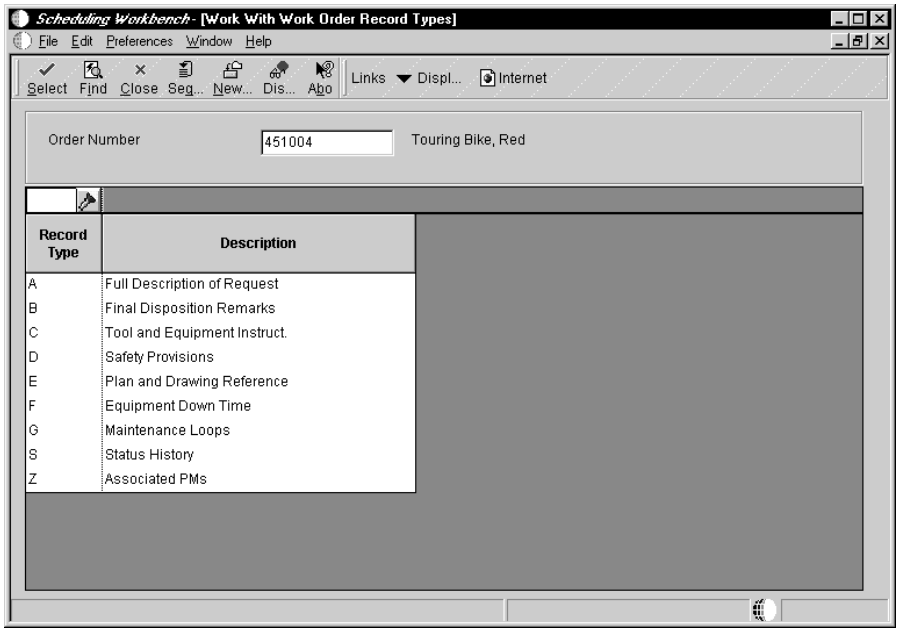
On Work With Work Orders



1. Complete any of the following fields to locate a work order and click Find:
   - Equipment Number
   - Business Unit or Job
   - Subsidiary
   - Parent Order Number

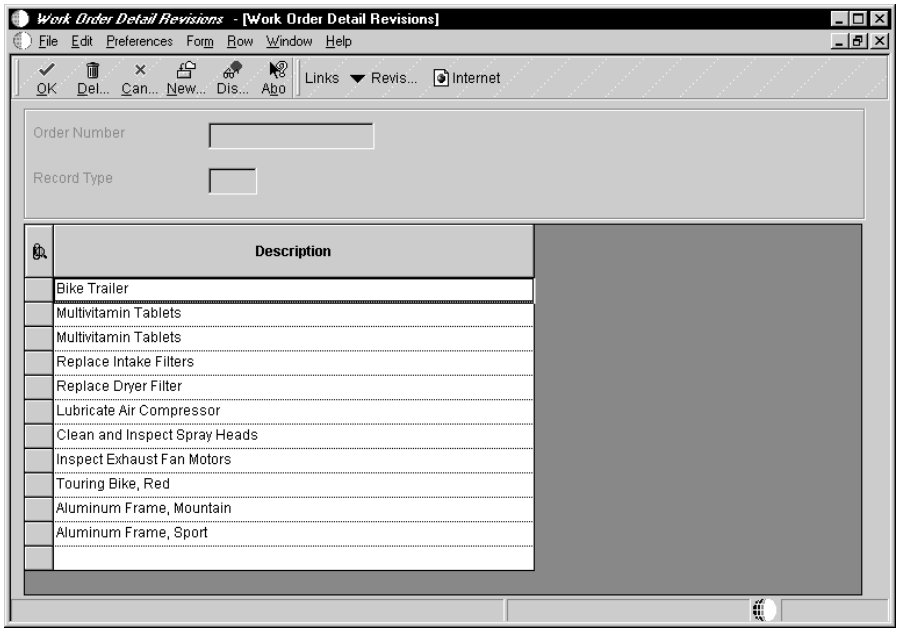
   Alternatively, you can complete any of the fields on any of the tabs to locate work orders.

2. Choose a work order and choose Record Types from the Row menu.



3. On Work With Work Order Record Types, complete the following field and click Select:

   - Record Type



4. On Work Order Detail Revisions, type the appropriate description for the selected record type for this work order and click OK.
5. To type descriptions for other record types for this work order, repeat steps 3 through 4.

Field	Explanation
Equipment Number	An identification code for an asset that you can enter in one of the following formats: 1 Asset number (a computer-assigned, 8-digit, numeric control number) 2 Unit number (a 12–character alphanumeric field) 3 Serial number (a 25-character alphanumeric field) Every asset has an asset number. You can use unit number and serial number to further identify assets as needed. If this is a data entry field, the first character you enter indicates whether you are entering the primary (default) format that is defined for your system, or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats on the Fixed Assets system constants form. Note: This field appears only when reviewing a message on Message Log. . . . . . *Form-specific information* . . . . . . If you enter an equipment number when you create a work order, the system can assign a default search cross-reference number based on that equipment number. Processing options allow you to determine whether the system assigns the equipment's immediate parent number, its top-level parent number, or a value from the parent work order number as the search cross-reference.
Business Unit or Job	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant. Business unit security can prevent you from locating business units for which you have no authority.
Subsidiary	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.
Parent Order Number	This is the parent work order number. You can use this number to: • Enter default values for newly added work orders, such as Type, Priority, Status, or Manager. • Group work orders for project setup and reporting.
Record Type	The detail specification record type. Record types are user defined. You can set them up on the Detail Specification Types form and use them to describe certain types of work order or engineering change order information.

Processing Options for Work With Work Orders

Defaults 1

Enter the Default Category Codes to be used to Search for Work Orders

1. Phase _____
2. Category Code 02 _____
3. Category Code 03 _____
4. Category Code 04 _____
5. Category Code 05 _____
6. Category Code 06 _____
7. Category Code 07 _____
8. Category Code 08 _____
9. Category Code 09 _____
10. Category Code 10 _____

Defaults 2

Enter the Default Values to be used to Search for Work Orders.

1. From Status Code W.O. _____
2. Thru Status Code W.O. _____
3. Type – W.O. _____
4. Document Type _____

Defaults 3

Enter the default address book numbers to be used to search for work orders.

1. Job or Business Unit _____
2. Originator _____
3. Customer _____
4. Planner _____
5. Supervisor _____

Versions

Enter the version of the following applications to call. Leave blank to use the default version defined in parentheses.

1. Work Order Print. (XJDE0001) _____
2. Completed PM. (ZJDE0001) _____
3. Parts List. (ZJDE0001) _____
4. Routing Instructions. (ZJDE0001) _____
5. Inventory Issues. (ZJDE0002) _____
6. Time Entry. (ZJDE0002) _____
7. Returned Material Authorization. (ZJDE0001) (CSMS Only) _____

WO Entry

1. Choose the work order entry program to call when adding or selecting a work order. This entry program will also decide which UBE will be called for printing. ’1’ - _____

```
      Equipment Work Orders (P48011)
      '2'    -  Service Work Orders
      (P17714)      '3'    -  Project
      Task Details       (P48014)
      2. Enter the version of  the                    _____________
      selected work order entry to call.
      Leave blank to use default version
      defined in parentheses.
      Work Order Entry (ZJDE0001)

Process

      1. Enter a '1' to highlight the                 _____________
      priority field within the grid.
      Leave blank to not highlight.
```

Working with Supplemental Data

You can enter supplemental data to further define the work orders in your system. Supplemental data is useful for reporting and tracking work order details that are not included in the record types, such as a data type for safety procedures.

You can use the following formats when you define supplemental data for work orders:

C (Code)	You can define column titles and enter information in the columns, such as dates and amounts.
N (Narrative)	You can enter free-form text, such as notes and memos. You can attach narrative to code information.

After you enter supplemental data, you can use the following formats to review the information:

By data type	You can review additional information based on a supplemental data type. For example, if you set up a data type for budget estimates, you can review a list of all work orders that have been assigned this data type.
By work order	You can review additional information based on work order numbers. This enables you to review all supplemental data for a work order.

Working with supplemental data consists of the following tasks:

- Adding supplemental data to work orders
- Reviewing supplemental data by type

- Reviewing supplemental data by work order

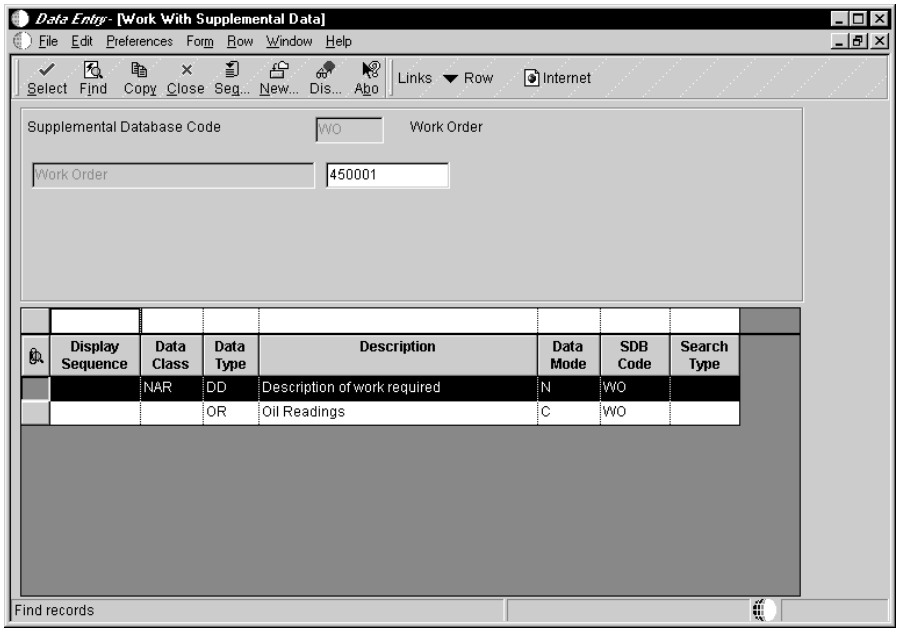
Before You Begin

❑ Set up the supplemental data types for the work orders in your system. See *Setting Up Supplemental Data for Work Orders*.

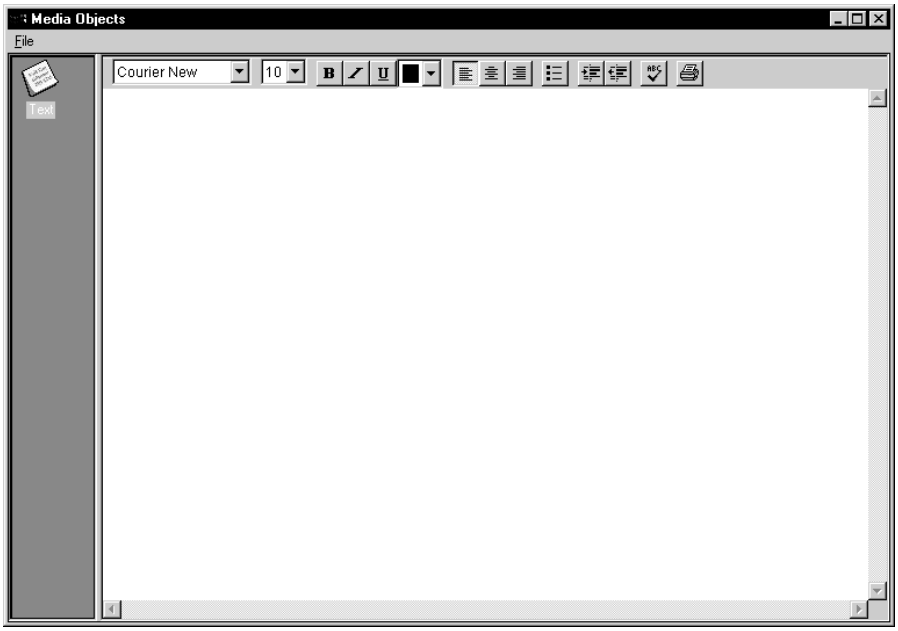
▶ To add supplemental data to work orders

From the Work Order Supplemental Data menu (G4813), choose Data Entry.

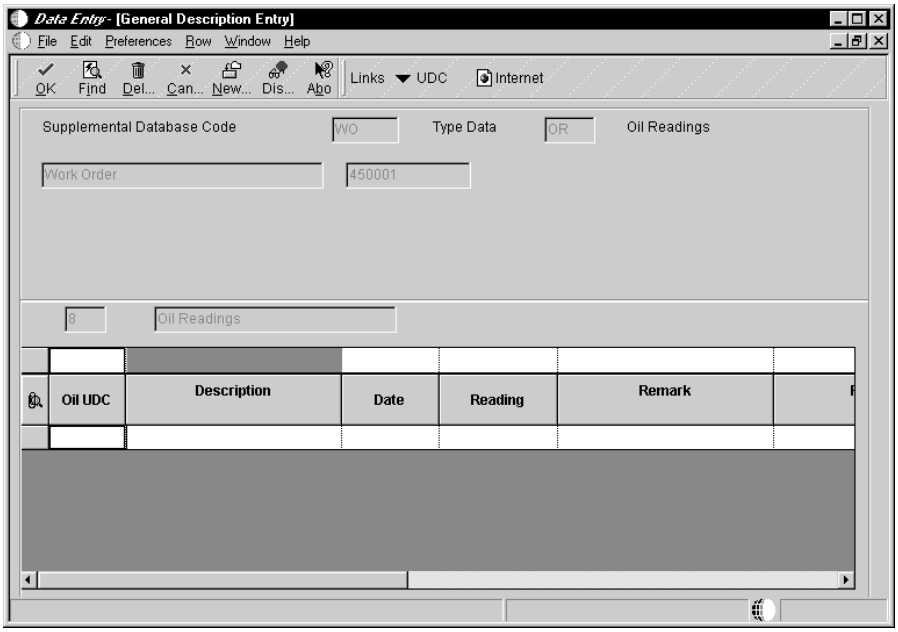
On Work With Supplemental Data



1. To display a list of valid supplemental data types for a work order, enter the order number in the following field (Work Order) and click Find:
   - Supplemental Data Numeric Key 1
2. Choose the data type for which you want to enter supplemental data for this work order, and click Select.
   - If the data type is in Narrative format, go to Step 3.
   - If the data type is in Code format, go to Step 6.



3. For Narrative data types on Media Objects, choose Add Text from the File menu.
4. Type the narrative text, such as safety procedures.
5. From the File menu, choose Save & Exit.



6. For Code data types on General Description Entry, complete any of the fields as needed and click OK.

Field	Explanation
Supplemental Data Numeric Key 1	This field specifies one of the numeric keys to the Generic Supplemental Database. You can select the key from a list of supported data items, such as Address Number, Account ID, Asset ID, Item Number, and so on.

Processing Options for Work With Supplemental Data

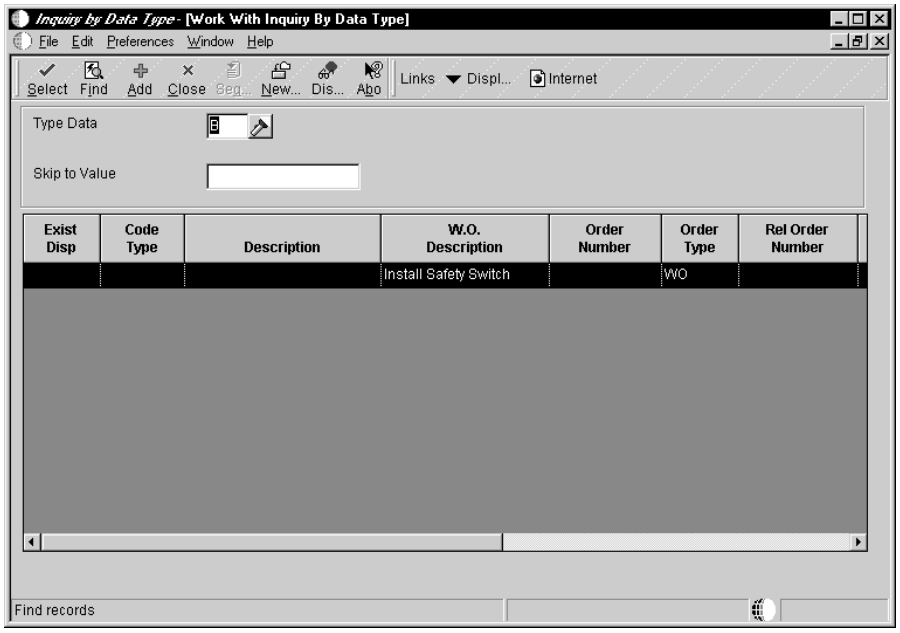
```
Processing

      1.  Select the Supplemental                    _____________
      Database Code for the system you
      would like to create a central
      information index for.
      2.  Enter a '1' if the system                  _____________
      should not assign an ending
      effective date when the field is
      left blank.
```

▶ To review supplemental data by type

From the Work Order Supplemental Data menu (G4813), choose Inquiry by Data Type.

On Work With Inquiry By Data Type



1. Complete the following field and click Find:
   - Type Data
2. Choose a work order to review and click Select.

3. On Work Order Data Revisions, review the additional information.

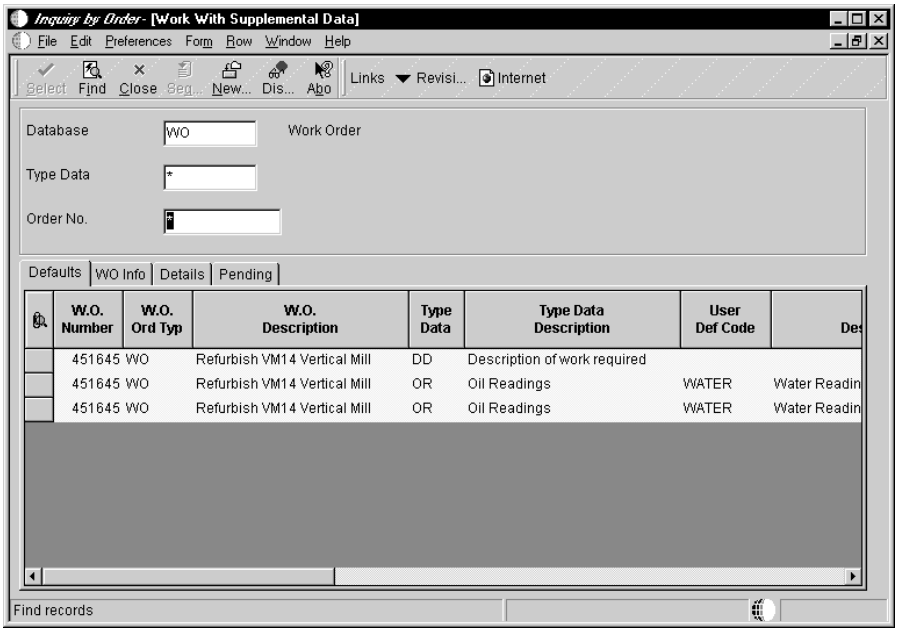
   You can also revise any of the information as needed.

Field	Explanation
Type Data	User defined code (00/WT) that indicates the type of data being entered within the supplemental database. The code is often an abbreviation for the data it represents, for example, EC might represent Engineering Change.

▶ To review supplemental data by work order

From the Work Order Supplemental Data menu (G4813), choose Inquiry by Order.

On Work With Supplemental Data



1. Complete the following field and click Find:
   - Order No
2. To view additional information, click the appropriate tabs or choose the appropriate options from the Row menu.

Processing Options for Inquiry by Order

Defaults

1. Enter a Supplemental Database Code. Only Data Types with this Database Code will be displayed. If left blank, the Engineering Change Orders data types (Database “ECO”) will display.

   Supplemental Database Code _____

Defaults (Cont

2. Enter Type Data Work Order code. This is the user defined code 00, type WT, which indicates the type of data being entered into the supplemental database. Examples are PO for Pending or DT for Details.

   Type Data _____

Copying Parent Work Orders

You can copy information from a parent work order to create a new work order. On the new work order, you need to complete those fields that require unique information. If you leave the remaining fields blank, the system completes them with values from the parent work order.

For example, you might need to perform maintenance on a machine that is similar to the maintenance that you performed on another machine. You can assign the previous machine's work order as the parent of the new work order for maintenance. The system automatically enters the appropriate information from the parent work order into the new work order.

You can also use the Copy button on Work With Work Orders to copy parent work orders.

See Also

- *Entering Basic Work Order Information*
- *Understanding the Application User Interface* in the *OneWorld Foundation Guide,* for information on the Copy button.

▶ To copy parent work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

On Work With Work Orders

1. Click Add.
2. On Enter Work Orders, complete the following field in the header area:
   - Description
3. On the General tab, complete the following field:
   - Parent Number
4. Complete any fields that must contain unique information, including the following fields:
   - Tax Expl Code
   - Tax Rate/Area

5. Leave the remaining fields blank, so that the system can complete them with values from the parent work order.
6. Click OK.

   The system provides default information from the parent work order for those fields left blank.

7. If necessary, revise any of the fields that contain information from the parent work order.
8. Enter any additional information, such as category codes and record types, to the work order.

Field	Explanation
Parent Number	This is the parent work order number. You can use this number to: • Enter default values for newly added work orders, such as Type, Priority, Status, or Manager. • Group work orders for project setup and reporting. . . . . . *Form-specific information* . . . . . You can copy information from a parent work order to create a new work order. On the new work order, you need to complete some fields for unique information. If you leave the remaining fields blank, the system completes them with values from the parent work order.

Creating Work Orders for a Project

Creating work orders for a project is similar to creating work orders with parent information. However, when you use Project Setup to create the work orders, you can create several work orders at the same time and group them into a hierarchy under an existing parent work order. The parent work order represents the project, and each work order that is assigned to the parent represents a task in the project.

For each work order in the project, the system automatically enters the basic work order information, category codes, and record type information from the parent work order. After you create the project hierarchy, you can then enter additional information that is specific to each work order.

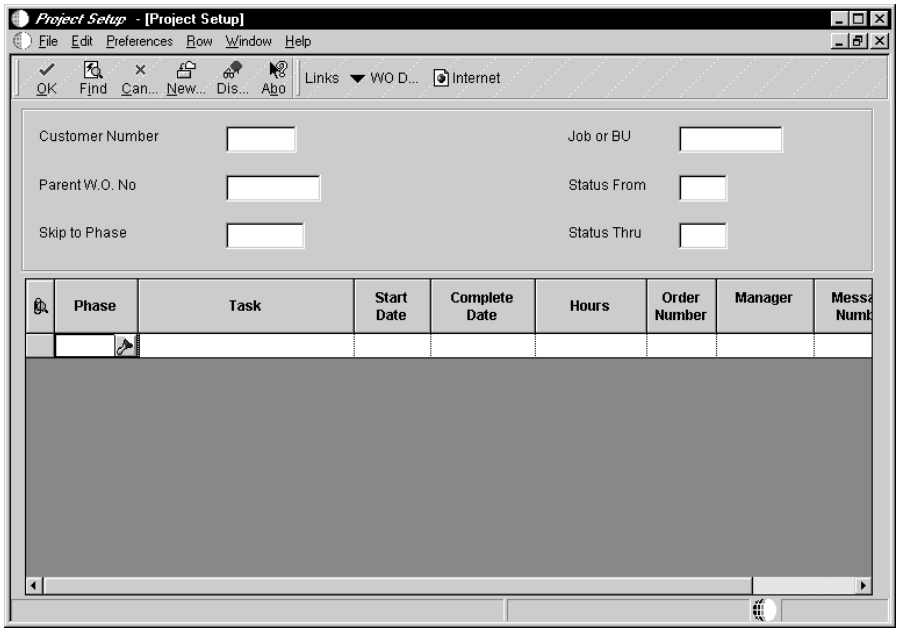
See Also

- *Copying Parent Work Orders*
- *Entering Record Type Descriptions*

To create work orders for a project

From the Simple Project Management menu (G4812), choose Project Setup.

On Project Setup



1. Complete the following field in the header area:
   - Parent W.O. No
2. Complete the following optional fields in the header area:
   - Address Number

     Enter the customer number in this field. For project work orders, use the customer number in combination with either the job or business unit or the parent work order number.

     If you use only the customer number, you must use the Enter Work Orders form to enter all the necessary work order information for the individual work orders in the project.

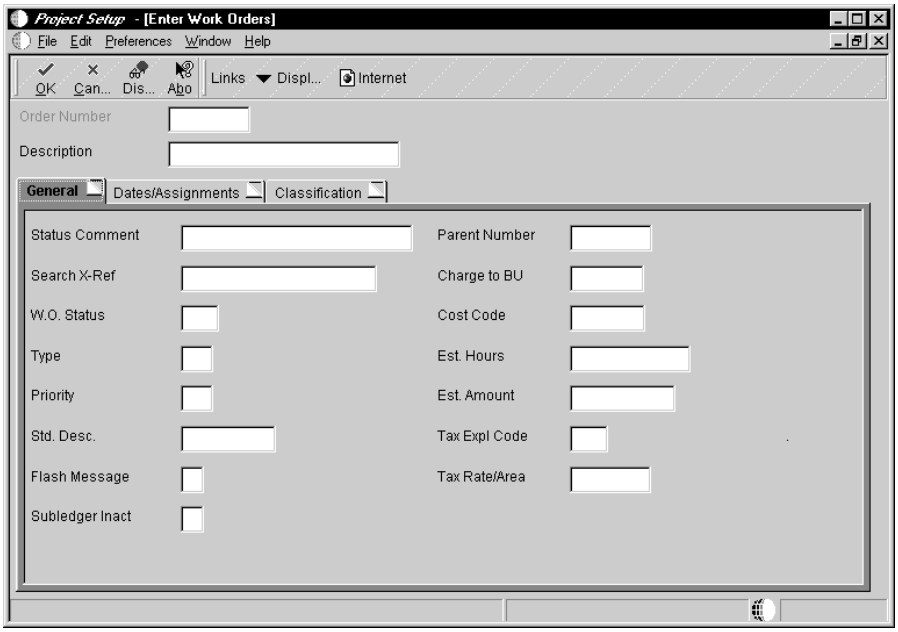
   - Job or BU

     If you create work orders for a project using the job or business unit, the system completes all the default information that is related to project cost. You must use the Enter Work Orders form to enter any additional work order information that you want to associate with the individual work orders for the project.

3. For each work order in the project, complete the following fields in the detail area:
   - Phase
   - Task
   - Start Date
   - Complete Date
   - Hours
   - Manager
4. Click OK.

   The system creates the project for the work orders that you entered.

5. To locate and revise any of the unique information for your project work orders, click Find.
6. On Project Setup, choose a work order and then choose WO Detail from the Row menu.



7. On Enter Work Orders, revise any fields that must contain unique information (rather than default information from the parent work order).
8. Enter any additional information, such as category codes and record types, to the work order.
9. Repeat steps 6 through 8 for each project work order that you need to revise.

Field	Explanation
Parent W.O. No	This is the parent work order number. You can use this number to: • Enter default values for newly added work orders, such as Type, Priority, Status, or Manager. • Group work orders for project setup and reporting.
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other address book members.
Job or BU	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant. Business unit security can prevent you from locating business units for which you have no authority.
Phase	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time. Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
Task	A user defined name or remark.
Start Date	This is a start date for the work order or engineering change order. You can enter the date manually or let the system enter it for you. If the work order is associated with a parent work order, the system enters the start date from the parent work order. If there is no associated parent work order, the system enters the system date.
Complete Date	The date the work order or engineering change order is completed or canceled.
Hours	The estimated hours that are budgeted for this work order.
Manager	The address book number of a manager or planner. Note: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the information displays automatically on any work orders that you create if the category code criterion is met. (You can either accept or override the default value.)

Processing Options for Project Setup

Processing

1. Enter a ’1’ to default the manager and supervisor based on the values for category codes 1, 2 or 3. _____

2. Enter the defaults for the following fields:

a. Type _____
b. Priority _____
c. Beginning Status _____
d. Phase (Categorie Code 1) _____
e. Categorie Code 2 _____
f. Categories Code 3 _____

Program

1. Choose the work order entry program to call when the option exit is used: ’2’ = Equipment Work Order (P48011) ’3’ = Work Order Entry (SAR) (P48012) ’4’ = Manufacturing Work Order (P48013) ’5’ = Project Task Details (P48014)(default) _____

Work Order Processing

You can review existing work orders and update work order information as necessary. For example, as the work progresses, you can do the following:

- Approve a work order and allow work to begin
- Update the life cycle information for the work order to indicate the progress of the work, for example, to indicate that parts have been ordered
- Track the costs that are associated with the work order, such as parts and labor costs

The life cycle of a work order consists of the steps or statuses through which a work order must pass, indicating the progress of the work. For example, a work order's life cycle can include the following statuses:

- Request for work to be performed
- Approval for work to proceed
- Waiting for materials
- Work in progress
- Work complete
- Closed

Work order processing consists of the following tasks:

- ❑ Locating work orders
- ❑ Working with work order approvals
- ❑ Revising work orders
- ❑ Printing work orders
- ❑ Working with charges to work orders

Locating Work Orders

Within a typical organization, hundreds of work orders might await processing. You can use specific search criteria on the Scheduling Workbench to limit your search for particular work orders. You use the information that you know about specific work orders to narrow your search. For example, you can locate all work orders that share the same criteria, such as the following:

- A job or business unit
- The person who originates the work orders
- The person who manages or supervises the work to be performed
- User defined information that is associated with the work orders, such as category codes and work order types
- Dates associated with the work orders, such as start date and planned completion date

You can use any combination of search criteria to locate work orders with similar characteristics. For example, you can locate all work orders for a business unit that are assigned to a particular supervisor. You can also locate all maintenance work orders that are scheduled to start on a particular date. The more information that you enter, the more you narrow your search for a specific work order or group of work orders.

After you locate a work order, you can use the Scheduling Workbench to access a variety of forms and complete multiple tasks with a specific work order. For example, after you locate a work order, you can access Work Order Approval directly from the Scheduling Workbench without having to access additional menus.

Cross-System Functionality

You must have the Equipment/Plant Management system (13) in addition to the Work Orders system to access the following programs from the Scheduling Workbench:

- Unscheduled Preventative Maintenance
- Equipment Backlog
- Capacity Messages
- Completed Preventative Maintenance
- Parts List
- Equipment Work Orders

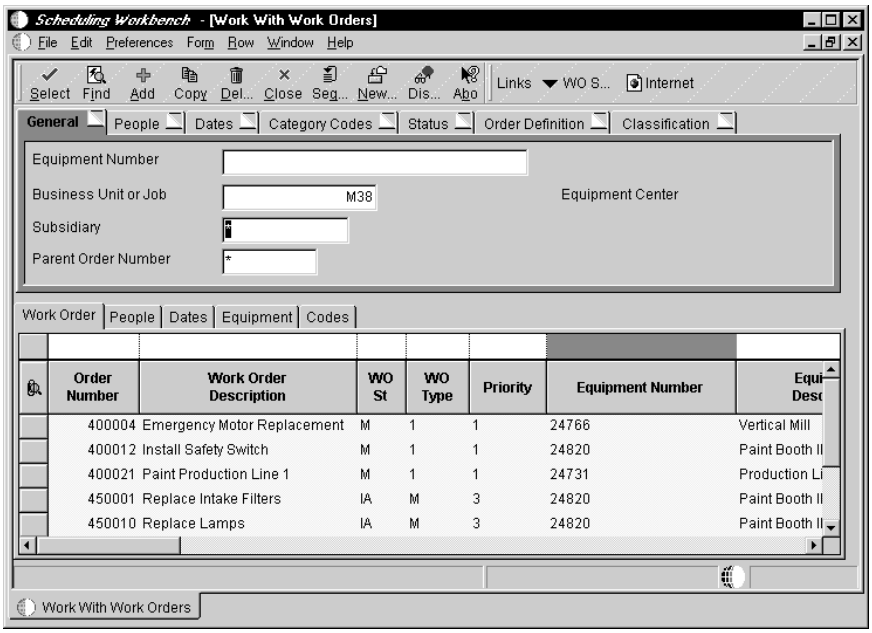
- Instructions
- Issues

You must have the Procurement system to access Open Order Inquiry.

▶ To locate work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

On Work With Work Orders



To limit your search for specific work orders, click the tabs on the top row, complete any combination of the fields, and click Find.

Working with Work Order Approvals

You can review, approve, or reject work orders. When you approve a work order, the system sends an electronic mail message to the next person on the work order approval route. When you reject a work order, the system sends an electronic mail message to the person who requested the work order.

You can also place a work order on hold if you want to approve or reject the work order at a later time. The system does not send any messages when you place a work order on hold.

During the approval process, the system generates an audit record for approvals and rejections. If you must reject a work order after initially approving it, the system creates an audit record for the rejection and stores the original approval record for historical purposes.

Working with work order approvals consists of the following tasks:

- ❑ Approving work orders
- ❑ Reviewing the approval history of work orders

Approving Work Orders

You can use the Scheduling Workbench to review and approve work orders. After you enter the information to create a work order, the system sends an electronic message to notify the person who is responsible for reviewing and approving the work order. You can directly access the approval form from the message center.

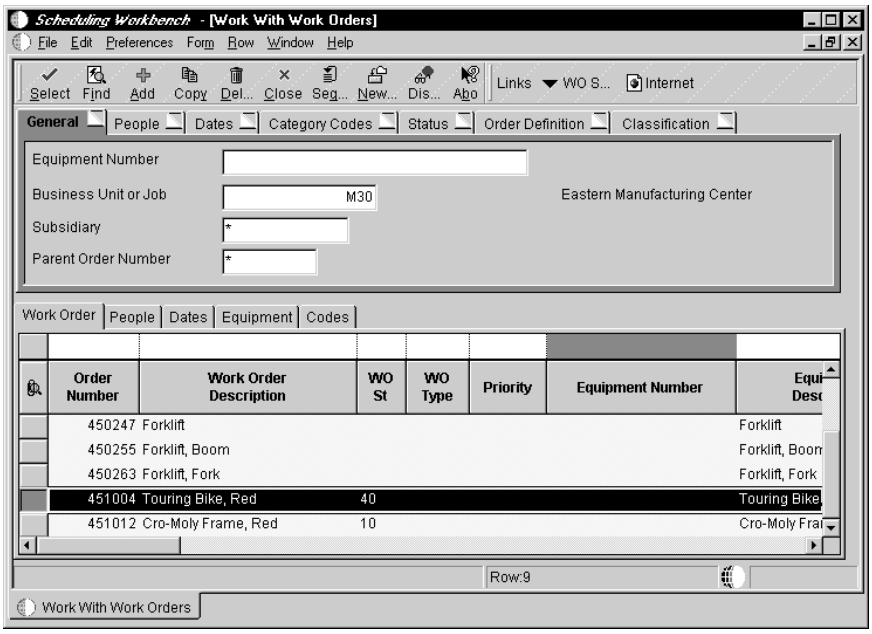
Before You Begin

- ❑ Set up user profiles for all personnel who are responsible for approving work orders. See *Setting Up User Profiles*.
- ❑ Verify that all personnel who are responsible for approving work orders are included in the work order approval routing. See *Setting Up Approval Routes for Work Orders*.

▶ To approve work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

On Work With Work Orders

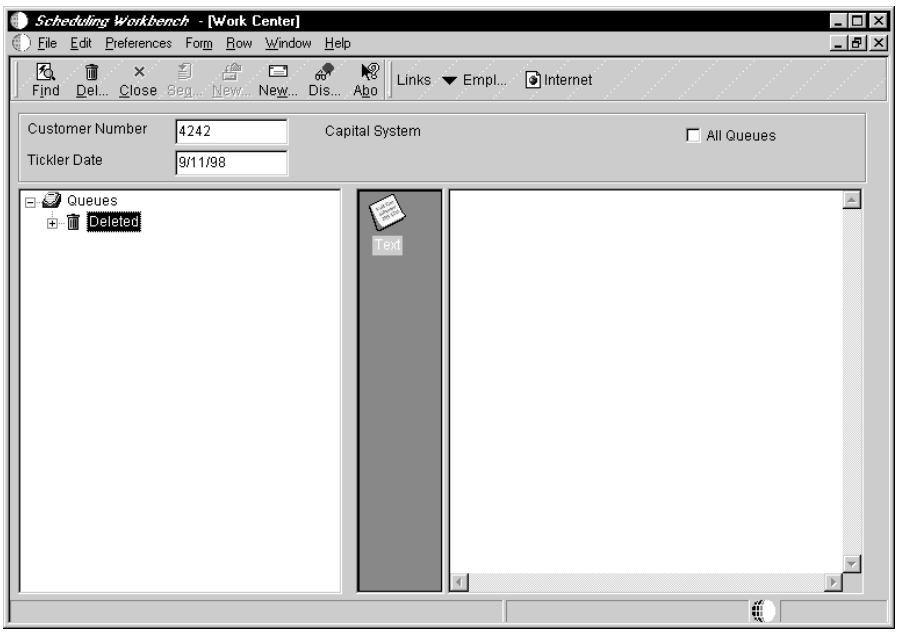


1. Complete any of the following fields and click Find:
   - Equipment Number
   - Business Unit or Job
   - Subsidiary
   - Parent Order Number
   - Order Number

   Alternatively, you can complete any of the fields on any of the tabs to locate work orders.

2. Choose the work order that you want to approve, and choose WO Approval from the Row menu.

   The system displays any work orders for which approvals are pending on the Work Center.



3. On the Work Center, approve or reject the work order.

   For additional information, see *Messages and Queues* in the *OneWorld Foundation Guide.*

Reviewing the Approval History of Work Orders

You can use the Scheduling Workbench to help you monitor the status and progress of work orders. You can review the current approval status of any work order in your system. When you enter a work order number, the system displays the following:

- The person who approved or reviewed the work order
- The date that the work order was approved or reviewed
- The status of the work order, such as approved or in process

You can also review any notes about the work order.

To review the approval history of work orders

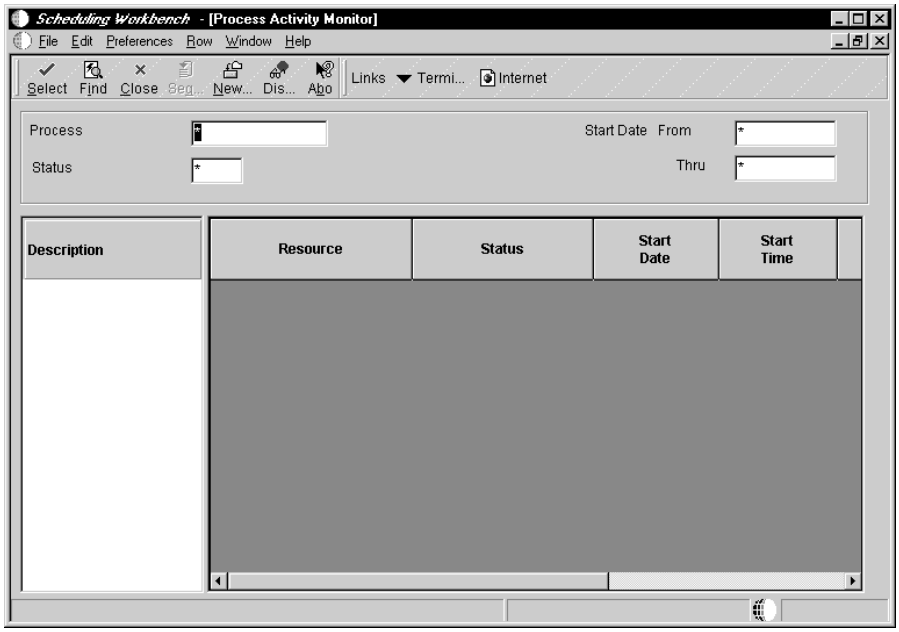
From the Work Order Processing menu (G4811), choose Scheduling Workbench.

On Work With Work Orders

1. Complete any of the following fields and click Find:
   - Equipment Number
   - Business Unit or Job
   - Subsidiary
   - Parent Order Number
   - Order Number

   Alternatively, you can complete any of the fields on any of the tabs to locate work orders.

2. Choose the work order to review, and choose WO Approval Audit from the Row menu.



3. On Process Activity Monitor, review any notes that the approver might have entered for the work order.

   For additional information, see *Monitoring Process Activity* in the *Enterprise Workflow Management Guide*.

Revising Work Orders

You can locate and revise work orders as they move throughout the work order life cycle. The life cycle of a work order consists of the steps or statuses through which a work order must pass, indicating the progress of the work.

You can revise a work order as information changes or new information becomes available. You can revise any information except the work order number. If you use work order approvals, you might not be able to change some life cycle statuses depending on how your system is set up. Some of the information you might revise includes:

- Life-cycle statuses
- Planned start and completion dates
- Percentage of work completed
- Estimated hours to complete the work

For example, you can change the start date of work orders if you do not have the labor resources or parts that you need to complete the work. You can use search criteria to narrow your search to the specific work orders that you want to revise. This is especially useful when you need to revise a single field for a group of related work orders.

See Also

- *Setting Up Approvals for Work Orders*

▶ To revise work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

On Work With Work Orders

1. To limit your search for a specific work order or group of work orders, complete any combination of fields on any of the tabs and click Find.
2. Choose a work order that you need to revise and click Select.
3. On Enter Work Orders, make any necessary revisions to the work order information.

4. To update life cycle information, complete the following field on the General tab:
   - W.O. Status
5. If you located multiple work orders in step 1, repeat steps 2 through 4 for each work order that you need to revise.

Field	Explanation
W.O. Status	A user defined code (00/SS) that describes the status of a work order or engineering change order. Any status change from 90 thru 99 automatically updates the date completed.

Printing Work Orders

You can print work orders when you need a hard copy of a work order or group of work orders. For example, shop personnel might need to print a hard copy of a work order for equipment that is serviced. If you already know the work order number, you can quickly print the work order from the work order master. If you need to print multiple work orders, you can use report selection criteria to specify which work orders to print.

Printing work orders consists of the following tasks:

- ❑ Printing single work orders
- ❑ Printing multiple work orders

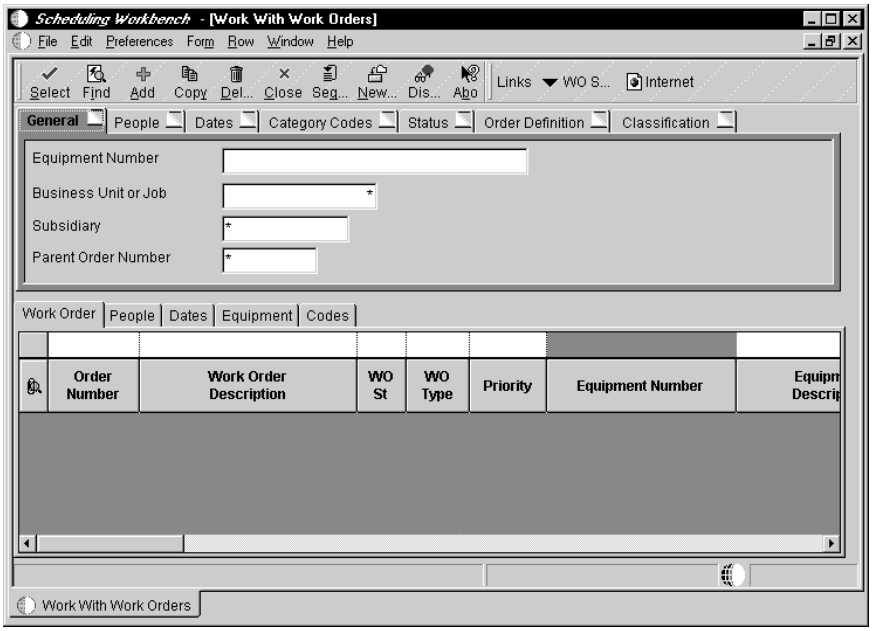
Printing Single Work Orders

You can print single work orders when you need a hard copy of a work order or group of specific work orders. For example, shop personnel might need to print a hard copy of a work order for each piece of equipment that is serviced. If you already know the work order number, you can quickly print the work order from the work order master.

▶ To print single work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

On Work With Work Orders



1. To limit your search for a specific work order, complete any combination of fields on any of the tabs and click Find.
2. Choose the work order that you want to print and do one of the following:
   - From the Row menu, choose Print WO.
   - Click Select.

   On Enter Work Orders, choose Print Work Order from the Form menu.

Printing Multiple Work Orders

From the Work Order Processing menu (G4811), choose Work Order Print.

You can print multiple work orders by using report selection criteria to specify the work orders that you want to print.

To print multiple work orders, choose a version from the report versions list. The report versions list includes a DEMO version that you can run without changes, or you can copy and modify the DEMO version to suit your needs.

See Also

- *Working With Batch Versions* in the *OneWorld Foundation Guide* for information about running, copying, and changing a report version

Working with Charges to Work Orders

You can charge costs to work orders using any system that creates general ledger transaction records with a subledger type of W. For example, for a particular work order, you can use the Accounts Payable system to charge for travel time and expenses, the Inventory Management system to charge for material costs, and the Payroll or Time Accounting systems to charge for employee time.

You enter charges to a work order through a subledger. The subledger stores information in the Account Ledger table (F0911) and the Account Balances table (F0902). You can access the work order information in these tables for project management and cost accounting purposes.

When you enter work order numbers in subledger fields, you can:

- Review summaries of work order charges by job or business unit
- Maintain and track costs online from the Work Orders system
- Review posted and unposted cost transactions to individual work orders

Working with charges to work orders consists of the following tasks:

- ❑ Adding charges to work orders
- ❑ Reviewing charges by job or business unit
- ❑ Reviewing charges by work order

Adding Charges to Work Orders

You add charges to a work order whenever you issue parts and materials to the work order. You can also add employee and equipment time to a work order. When you add charges to a work order, the system creates journal entries in the Account Ledger table (F0911). You can add work order charges to any valid account in the Account Master table (F0901).

You can only add charges to open work orders. You can identify a closed work order by the code in the Subledger Inactive field on the Enter Work Orders form.

Cross-System Functionality

You can add charges to a work order using any J.D. Edwards system that creates general ledger transaction records with subledgers. Following are some guidelines:

Time Accounting, Inventory Management, and Accounts Payable systems	You can access Inventory Management and Accounts Payable by using selections on the Work Order Processing menu. To access Time Accounting, you need to enter the fast path menu number. You must have installed these systems to use their functionality with the Work Orders system.
Inventory Management system	You can use the Inventory Issues program to enter charges for inventory and materials against a work order. See *Issuing Inventory* in the *Inventory Management Guide*.

About Speed Code Entry

You can save time and reduce the possibility of data entry error by using speed code entry when you add charges to work orders. Use the speed code to access account information that is already in the system so that you do not have to re-enter the information. When you use speed code entry, the system:

- Updates the account number with the business unit and the cost code (if available) from the work order
- Updates the Subledger field with the work order number
- Updates the Type field with a W (work order)

The code that you enter in the Account Number field for speed code entry depends on the system that you use to add charges to work orders, as follows:

Accounts Payable system

Enter a back slash, work order number, a period, and an object account number (\WO.object account)

Example: \1919.SHOP

Inventory Management system

Enter a back slash, work order number, a period, and an object account number (\WO.object account)

Example: \1919.SHOP

You must have installed the following systems to use the Inventory Management system:

- Inventory Base and Order Processing (system 40)
- Inventory Management (system 41)

Time Accounting system

Enter a back slash, work order number, and a period (\WO.)

Example: \1919.

You must have purchased and installed at least one of the following systems:

- HR and Payroll Foundation (system 05)
- Stand-alone Time Accounting (system 05T)
- Payroll (system 07)
- Payroll (Canadian system 77)

In addition, you must set up Accounting Rules for Work Orders.

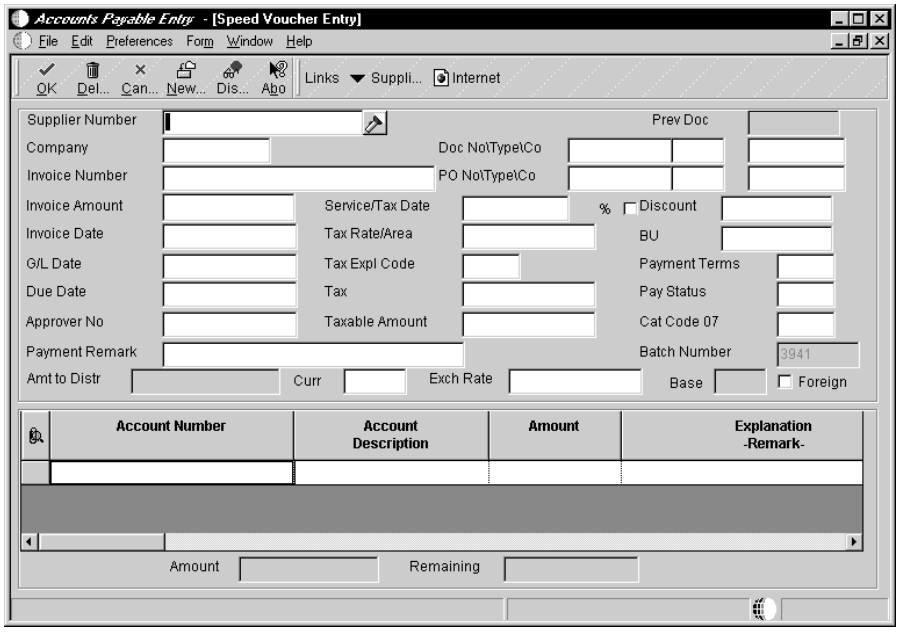
See *Setting Up Accounting Rules for Work Orders*.

To add charges to work orders

From the Work Order Processing menu (G4811), choose Accounts Payable Entry.

The following procedure is for entering a typical accounts payable voucher.

On Speed Voucher Entry



1. Enter the information for the accounts payable voucher.
2. To enter work order information, complete the following fields:
   - Account Number
   - Sub–ledger
   - Sub Type

See Also

- *Working with Standard Vouchers* in the *Accounts Payable Guide*, for information about entering an accounts payable voucher.

Field	Explanation
Account Number	A field that identifies an account in the general ledger. You can use one of the following formats for account numbers: • Standard account number (business unit. object .subsidiary or flexible format) • Third G/L number (maximum of 25 digits) • 8-digit short account ID number • Speed code The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program.
Sub–ledger	A number that identifies a work order in the Service and Contract Billing systems. In general, if you specify a work order, you must also specify W as the subledger type for the work order.
Sub Type	A user defined code (00/ST) that you use with the Work Order (Subledger) field. For a work order, the subledger type must be W. NOTE: If you use A/P speed code entry, the field can be blank.

Processing Options for A/P Speed Voucher Entry

```
Manual Checks

1. Enter a '1' for manual checks

      1 = Manual Check Creation                    _____

2. Enter a '1' to automatically assign
    payment number based on the bank
    account's next payment number

      1 = Auto Payment Numbers                     _____

MBF Version

1.  Enter the number of the Master
    Business Function Processing Option
    Version to be used for Speed Voucher
    Entry.  If left blank, ZJDE0001 will
    be used.

      Version                                      _____
```

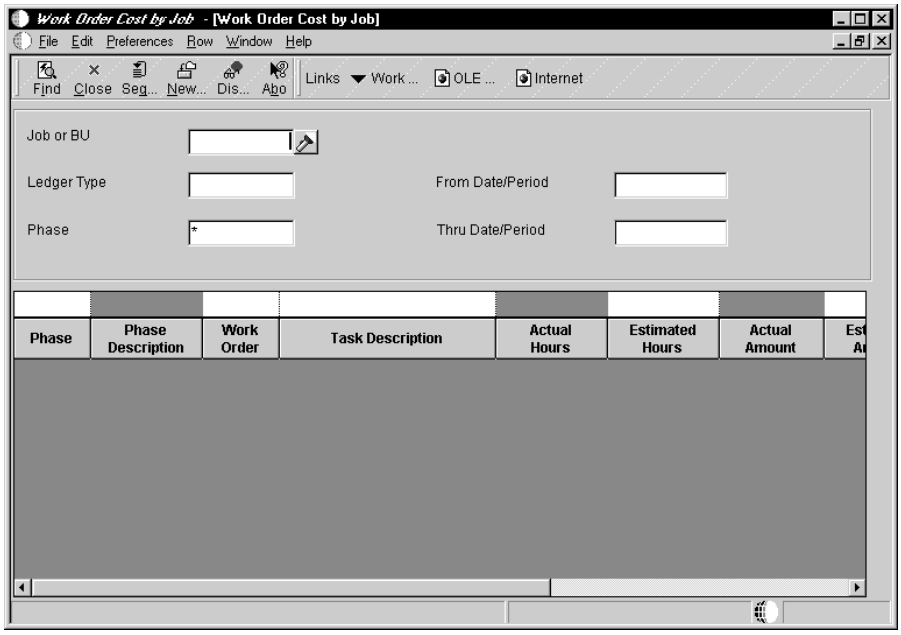
Reviewing Charges by Job or Business Unit

To help control costs and increase productivity, you can review work order costs that are charged against a particular job or business unit. You can review a summary of these costs, or you can review the charges that are within a specific date range or ledger type. If you do not limit your search criteria, the system displays all work orders within the job or business unit, along with the estimated and actual hours and costs for each work order.

▶ To review charges by job or business unit

From Simple Project Management (G4812), choose Work Order Cost by Job.

On Work Order Cost by Job



1. Complete the following field:

   - Job or BU

   Use the same number as Charge to BU on Enter Work Orders. The Job or BU field on Work Order Cost by Job refers to the value that displays in the Charge To BU field on Enter Work Orders. It does not refer to any other business unit to which you might have applied work order costs on the cost entry forms.

2. Complete the following optional fields and click Find:

   - Ledger Type
   - Phase

- From Date/Period
- Thru Date/Period

To review accumulated totals for a work order, complete the Phase field. The system displays accumulated totals, beginning with the first work order in the phase that you select.

3. To review detailed transaction information for a work order, choose Work Order Cost from the Row menu.

Field	Explanation
Job or BU	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant. Business unit security can prevent you from locating business units for which you have no authority.
Ledger Type	A user defined code (09/LT) that specifies the type of ledger, such as AA (Actual Amounts), BA (Budget Amount), or AU (Actual Units). You can set up multiple, concurrent accounting ledgers within the general ledger to establish an audit trail for all transactions.
Phase	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time. Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
From Date/Period	The beginning date of the range in a search. If you do not specify a beginning date, the system uses the current date.
Thru Date/Period	Enter the ending date for the period you want to review. If you leave this field blank, the system uses the ending date of the current period specified for the company.

Reviewing Charges by Work Order

To help you monitor and control the costs that are associated with individual work orders, you can review detailed charges against a work order. For example, for any charge against a work order, you can review the following information:

- A description of the transaction
- The account number that was charged
- The units that are charged, such as hours
- The amount of the transaction
- The batch number and the date
- The person responsible for the transaction
- The document number and document type
- The inventory item number or description

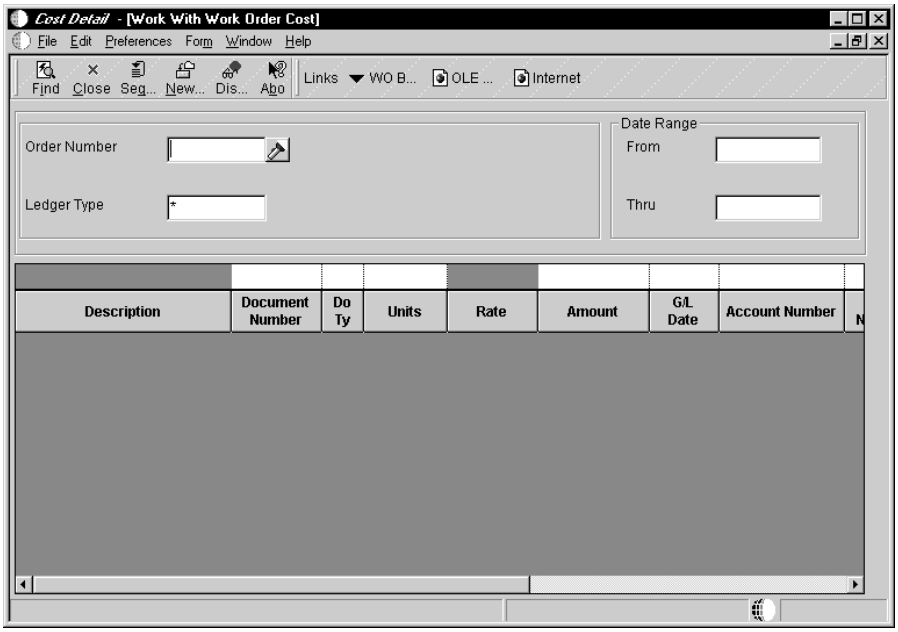
When you access the cost detail information for a work order, the system displays all general ledger transaction records for the work order. You can view the costs within a range of dates or by a ledger type. If you do not limit your search criteria, the system displays all costs that were charged to the work order.

In the general ledger, the system uses subledger accounting to handle cost accounting for work orders. The work order number is the subledger number, and the subledger type is always W (work order).

To review charges by work order

From the Simple Project Management menu (G4812), choose Cost Detail.

On Work With Work Order Cost



1. Complete the following field:
   - Order Number
2. Complete the following optional fields and click Find:
   - Ledger Type
   - From
   - Thru

   The system displays details about each work order transaction.

Periodic

Work Order Reports

You can print work order information in a variety of formats to help you manage work orders and work order projects.

You can print cost reports to review the costs associated with work orders, such as estimated and actual hours and costs. You can also review details about the cost transactions you charge to work orders.

Project management reports help you manage work order projects and schedules. These reports include the following information:

- Project phase
- Managers assigned to a project
- Messages and remarks that are assigned to work orders
- Planned and actual hours for work orders
- Start and end points of a project
- Sequence of tasks for a project and any wait time between tasks
- Status of the work orders in a project
- Number of hours remaining or the number of hours charged over the original estimate for each work order in a project

Work Order Reports consists of the following tasks:

- ❑ Printing cost reports
- ❑ Printing project management reports

See Also

- *Working With Batch Versions* in the *OneWorld Foundation Guide* for information about running, copying, and changing a report version

Printing Cost Reports

Use cost reports to review and analyze the costs and individual cost transactions that are associated with work orders. For example, you can verify the actual costs that were incurred in completing a work order.

Printing cost reports consists of the following tasks:

- ❑ Printing the Cost Summary report
- ❑ Printing the Cost Detail report

Printing the Cost Summary Report

From the Work Order Processing menu (G4811), choose Work Order Cost Summary.

You can print cost summary information for work orders and use processing options to enter the date range for the report. This report includes the following:

- Estimated hours and costs for each work order
- Actual hours and costs for each work order
- Difference between the estimated and actual hours and costs for each work order

Processing Options for Work Order Cost Summary

```
Process

1. Enter the date range for the report.
    Leave blank (default) to include all
    costs, regardless of their G/L
    dates.

          a. From Date:                    _____________
           b. Thru Date:                   _____________
```

Printing the Cost Detail Report

From the Work Order Processing menu (G4811), choose Cost Detail.

You can print cost detail information for work orders and use processing options to enter the date range for the report. This report includes the following:

- Actual hours and costs for each work order
- The general ledger date for each transaction
- An explanation of each transaction
- Total hours and amounts by phase code

Processing Options for Print Work Order Cost Detail

```
Process

Enter the From Date. Leave blank
    (default) to include all costs with
    G/L dates up to the Thru Date
    below.

      1. From Date                                _____________

Enter the Thru Date. Leave blank
    (default) to include all costs with
    G/L dates from the From Date
    forward.

      2. Thru Date                                _____________
```

Printing Project Management Reports

Use project management reports to review and manage information and schedules about the work orders that you group into a project. You can review information about the specific tasks that are associated with a project, resource requirements, and so on. For example, you can print summary and detail status information for work orders by manager.

Printing project management reports consists of the following tasks:

- ❑ Printing the Work Order Summary
- ❑ Printing the Detailed Task Description
- ❑ Printing the Project Status Summary

Printing the Work Order Summary

From the Work Order Processing menu (G4811), choose Print Work Order Summary.

You can print summary information to track and compare the progress of selected work orders, including the following details:

- Number of hours planned for each work order
- Number of actual hours charged as of the date that you specify
- Difference between hours planned and hours charged to date

You can use a processing option to control the format for printing equipment numbers on this report.

Processing Options for Print Work Order Summary

```
Print

      1.  Choose how to print the                          _____________
      Equipment Number:  ’  ’ = No
      Equipment Number   ’1’ = Asset
      Number    ’2’ = Unit Number    ’3’
      = Serial Number
```

Printing the Detailed Task Description

From the Simple Project Management menu (G4812), choose Detailed Task Description.

The Detailed Task Description lists the work orders that are included in a project. For each work order, the report includes the following:

- Description
- Estimated number of hours
- Standard message
- Category code 01 (phase)
- Extended description from record type A
- Any standard procedures

Printing the Project Status Summary

From the Simple Project Management menu (G4812), choose Print Project Status Summary.

The Project Status Summary contains summary and detailed status information about all the projects that are assigned to a specific manager, including:

- All work orders that are assigned to a manager
- Number of hours planned for each work order
- Actual hours charged as of the date of the report
- Number of hours remaining, or number of hours charged that exceed the original estimate

The report also lists a summary of activities for a manager by the work order status, type, priority, and all category codes.

Setup

System Setup

Before you use the Work Orders system, you need to define certain information that the system uses during processing. Use this information to customize the system for your business needs.

System setup consists of the following tasks:

- ❑ Setting up user defined codes
- ❑ Setting up standard procedures
- ❑ Setting up default managers and supervisors
- ❑ Setting up approvals for work orders
- ❑ Setting up formats for record types
- ❑ Setting up supplemental data for work orders
- ❑ Setting up accounting rules for work orders

Setting Up User Defined Codes

User defined codes (UDCs) enable you to customize the Work Orders system for your particular business needs. Although a number of pre-defined codes are provided with the Work Orders system, you can revise them and set up new codes.

After you set up user defined codes, you can assign them to work orders. You can set processing options for Enter Work Orders so that the system assigns default values for user defined codes on work orders.

The system stores user defined codes in tables for specific systems and code types. For example, 00/TY represents system 00 (Foundation environment) and user defined code list TY (type codes). User defined code tables determine which codes are valid for the individual fields in your system. If you enter a code that is not valid for a field, the system displays an error message.

You can access all user defined code tables from a single form. After you select a user defined code form from a menu, you can change the system code and the user defined code to access another user defined code table.

User defined codes are central to J.D. Edwards systems. You must be thoroughly familiar with user defined codes before you change them.

See Also

- *Entering Basic Work Order Information* to set processing options for default UDCs on work orders
- *User Defined Codes* in the *OneWorld Foundation Guide* for additional information about setting up user defined codes

User Defined Codes for Work Orders

The following are user defined codes for Work Orders:

Type codes (00/TY)	Type codes classify work orders by type, such as R for rework orders and D for design orders.
Priority codes (00/PR)	Priority codes classify work orders by priority, such as H for high priority and 1 for emergency priority. These codes are for reference only and do not affect the scheduling or planning of work.
Status codes (00/SS)	Status codes classify work orders by current status in the work order life cycle, such as A for approved and AP for approval pending. You can update the status code for a work order as work progresses.
Phase or Matter codes (00/W1)	Phase or matter codes indicate the implementation phase of the work order, such as 2 for project phase 2. You can use phase codes to group work orders for project management and cost accounting purposes.
Additional category codes (00/W2–W0)	Category codes 02–10 have no predefined values. They can represent any category or description by which you want to group work orders. For example, you can set up one category code to represent types of problems encountered in the work order process, such as improper installation or design flaws. Another code might represent locations where work is taking place.
Record type codes (00/RT)	Record type codes organize the descriptive information that you enter for your work orders, such as S for safety provisions and E for equipment down time. See *Entering Record Type Descriptions* for information about assigning record types to work orders.
Standard procedures (48/SN)	Use standard procedures to set up codes and text for your company, such as designating a specific procedure for a group of work orders. See *Setting Up Standard Procedures* for more information about using standard procedures codes and general messages.

Work order databases (00/WD)

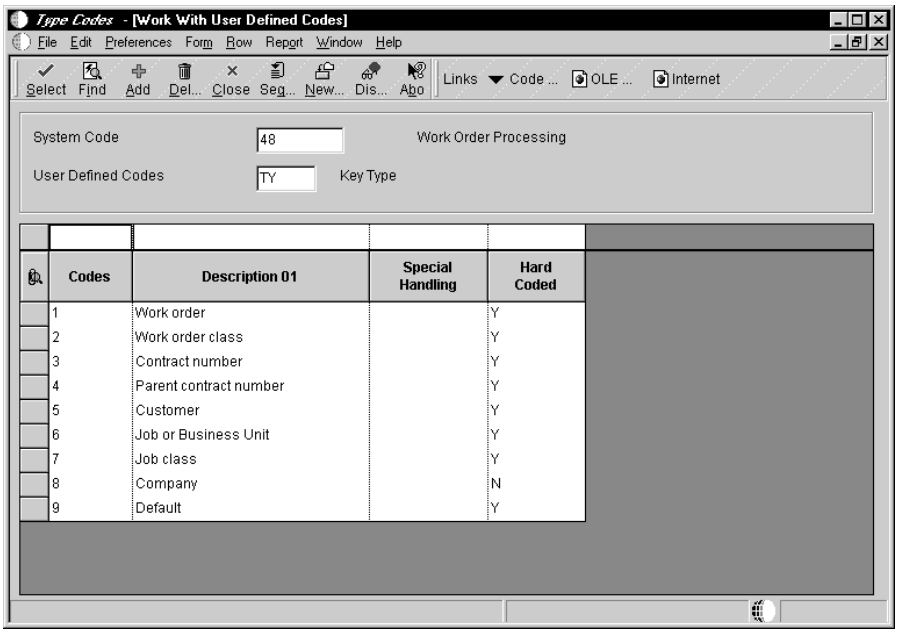
Work order databases group supplemental data types for work orders, such as E for engineering change orders.

See *Setting Up Supplemental Data for Work Orders* for more information.

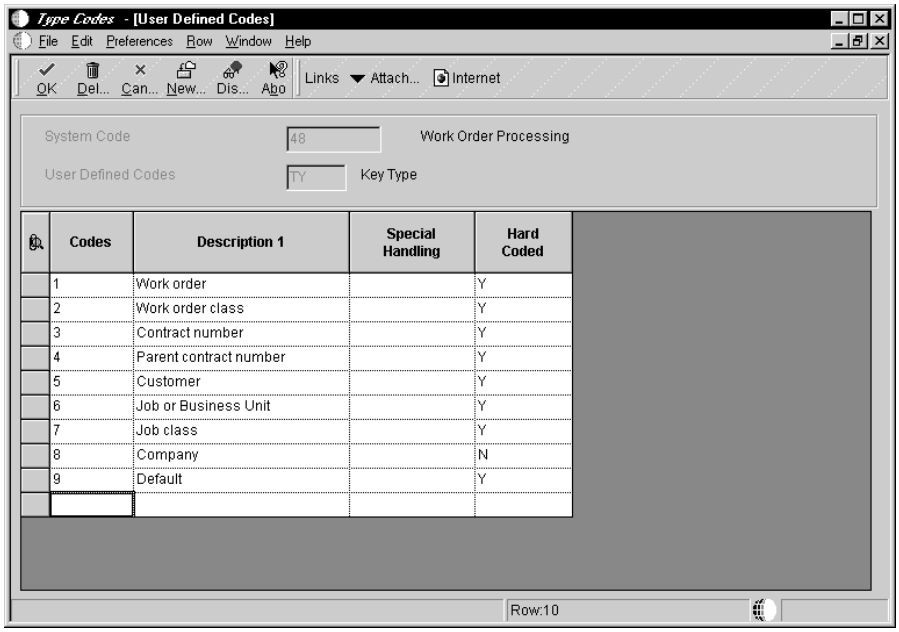
▶ To set up user defined codes

From the Work Order User Defined Codes menu (G4842), choose the code that you need to set up.

On Work With User Defined Codes



1. Complete the following fields and click Find:
   - System Code
   - User Defined Codes
2. Click Add.



3. On User Defined Codes, complete the following fields:

   - Codes
   - Description 1

   If you set up a user defined code that does not require a value, you must define "blank" as a valid value. To do so, leave the Codes field blank and enter at least one character in the Description 1 field. J.D. Edwards recommends that you type a period in the last position of this field.

4. Complete the following optional fields and click OK:

   - Special Handling
   - Hard Coded

Field	Explanation
System Code	A user defined code (98/SY) that identifies a J.D. Edwards system.
User Defined Codes	A code that identifies the table that contains user defined codes. The table is also referred to as a code type.
Codes	A column that contains a list of valid codes for a specific user defined code list.
Description 1	A user defined name or remark.

Field	Explanation
Special Handling	A code that indicates special processing requirements for certain user defined code values. The particular value you enter in this field is unique for each user defined code record type. The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify if the language is double-byte or if the language does not have uppercase characters. Programming is required to activate this field.
Hard Coded	A code that indicates whether a user-defined code is included as part of J.D. Edwards software and cannot be changed by a user.

Processing Options for User Defined Codes

Defaults

Enter the desired System Code: _____

Enter the desired Record Type: _____

Setting Up Standard Procedures

You can set up codes and generic text to describe standard procedures for your work orders. For example, you can:

- Designate a specific procedure for a work order or group of work orders
- Provide a list of instructions to complete a work order
- Include messages for work orders

For example, you might set up a code called 1000 for a 1000-hour maintenance inspection. For the 1000 code, you can enter text to describe procedures, such as checking coolant levels and adjusting belt tension.

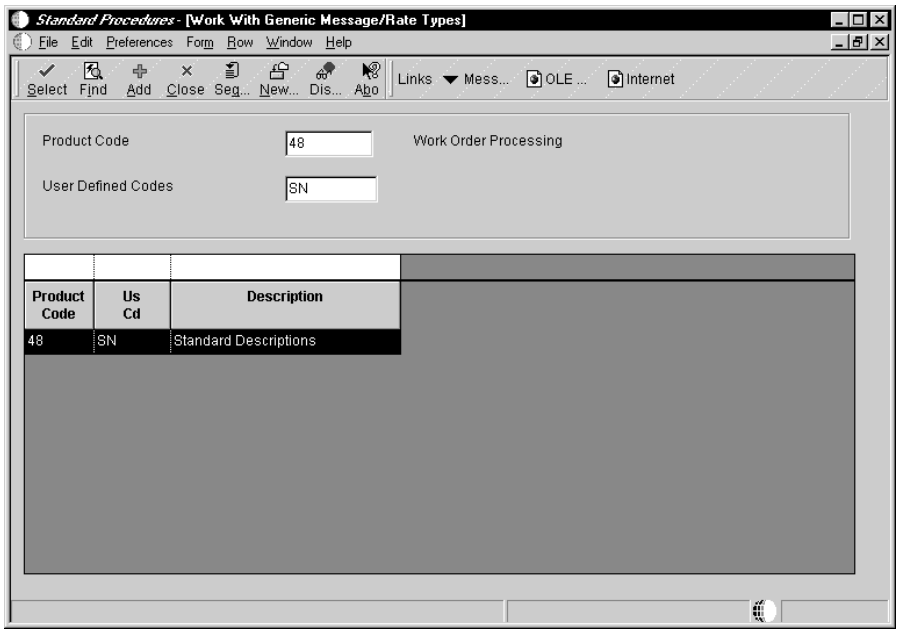
To avoid retyping similar procedures for every work order, you can also copy the appropriate message text from another procedure.

After you set up standard procedures, you can assign them to the appropriate work orders.

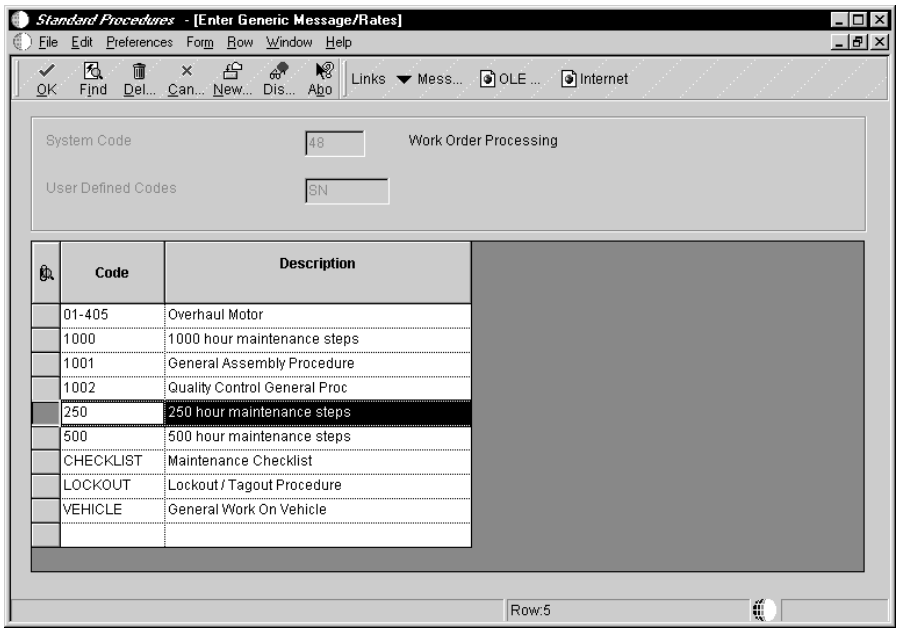
▶ To set up standard procedures

From the Work Orders Setup menu (G4841), choose Standard Procedures.

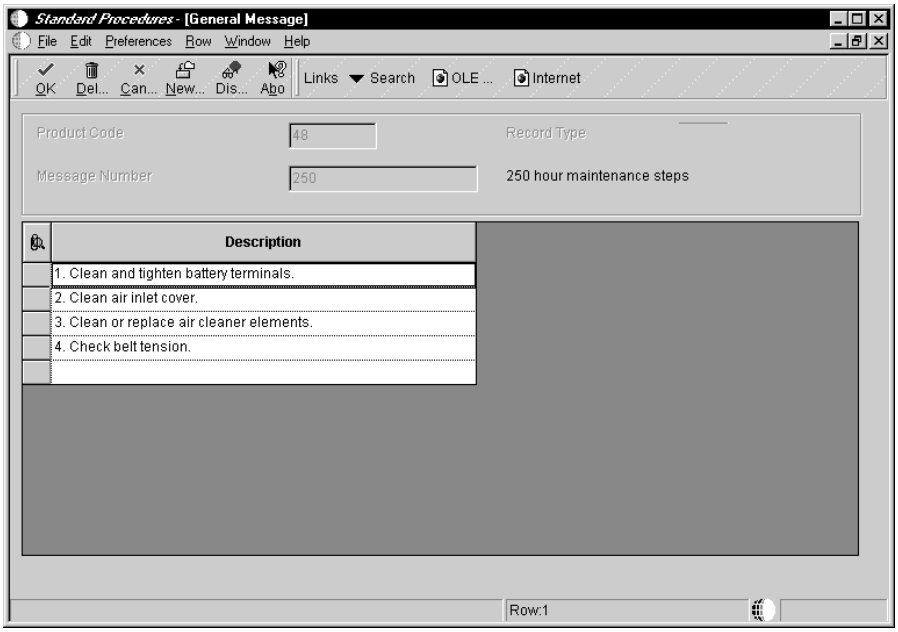
On Work With Generic Message/Rate Types



1. Type 48 in the following field:
   - Product Code
2. Type SN in the following field and click Find:
   - User Defined Codes
3. Choose the Standard Descriptions record and choose Message/Rates from the Row menu.



4. On Enter Generic Message/Rates, complete the following fields:
   - Code
   - Description
5. Choose the row that you entered and then choose General Message from the Row menu.



6. On General Message, do one of the following:
   - To enter new message text, go to step 7.
   - To copy message text from another procedure, go to Step 9.
7. Complete the following field with the description of the standard procedure:
   - Description
8. Click OK and go to Step 13.
9. On General Message, choose Search from the Row menu.
10. On Standard Text Search, complete any of the following fields and click Find:
    - System Code
    - User Defined Codes
    - Message Number
11. Choose the rows of text to copy and click Select.

    The text that you selected to copy appears on the General Message form.

12. On General Message, click OK.

    The system adds the message text to the standard procedure code.

13. On Enter Generic Message/Rates, click OK.

    If you need to change message text for a standard procedure code, you can type over the existing text.

Field	Explanation
Product Code	A user defined code (98/SY) that identifies a J.D. Edwards system.
User Defined Codes	A code that identifies the table that contains user defined codes. The table is also referred to as a code type.
Message Number	A list of valid codes for a specific user defined code list.

Processing Options for Standard Procedures

```
Defaults

1.  Enter the desired System Code.

      System Code                                    _____________

      Tax Authority 5

      Record Type                                    _____________

Display

1.  Enter a '1' to display Rate Text or
    a '2' to display Message Text.

      Text Type                                      _____________

2.  Enter a '1' for 60 column display or
    a '2' for 80 column display.

      Text Column Display                            _____________
```

Setting Up Default Managers and Supervisors

You can set up default address book information for managers and supervisors to appear on work orders. This default information is effective on Work Order Entry and Scheduling Workbench and is based on any combination of the first three work order category codes that appear on these forms.

You can set up as many versions of default managers and supervisors as you need. For example, assume that you have defined work order category code 02 as the failure code. You can assign a specific manager and supervisor to every work order with a failure code of F1 – Improper Start-up or Operation. You can assign another manager and supervisor to every work order with a failure code of F2 – Improper Installation or Repair.

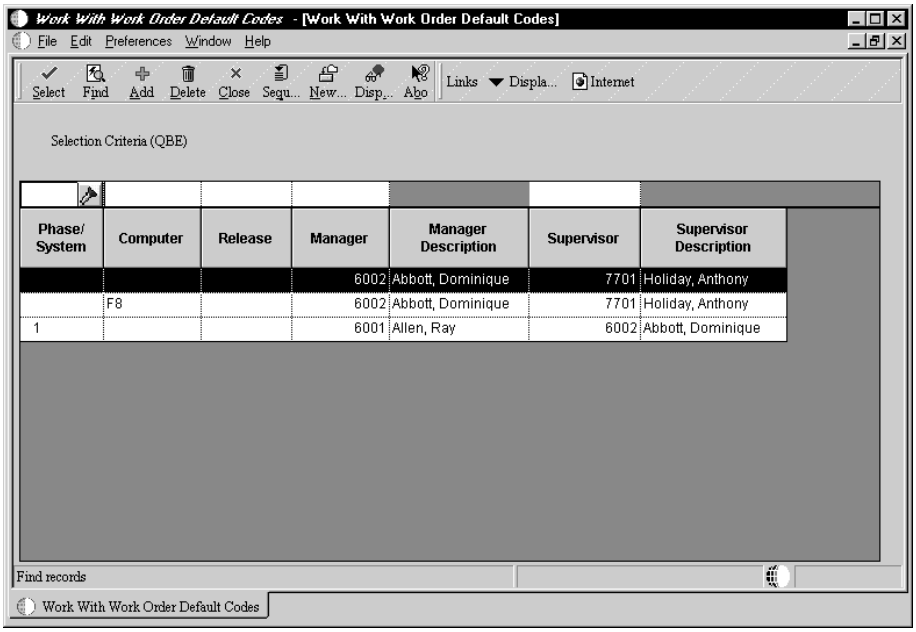
Before You Begin

- ❑ Set the processing options on Enter Work Orders and Project Setup to use default values for the manager and supervisor address book numbers.

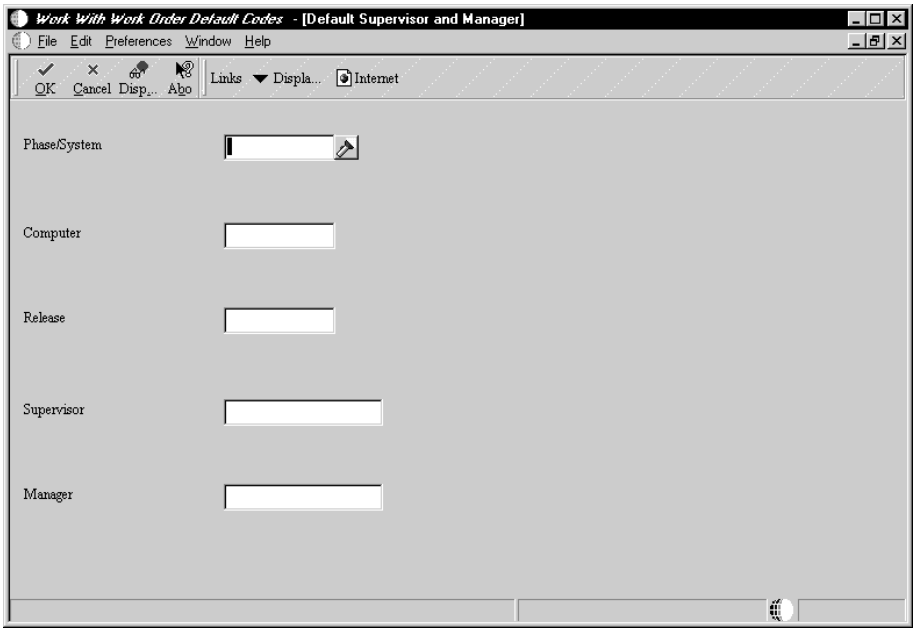
To set up default managers and supervisors

From the Work Orders Setup menu (G4841), choose Work With Work Order Default Codes.

On Work With Work Order Default Codes



1. Click Add.



2. On Default Supervisor and Manager, complete any combination of the following fields:
    - Phase/System
    - Computer
    - Release
3. To indicate which supervisor and manager are responsible, complete the following fields:
    - Supervisor
    - Manager

You must complete at least one category code field and one manager or supervisor field in order to set up the default information.

Field	Explanation
Phase/System	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time. Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
Computer	User defined code system 00, type W3, which indicates the type or category of a work order. Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)
Release	User defined code system 00, type W2, which indicates the type or category of a work order. Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)

Field	Explanation
Supervisor	The address book number of the supervisor. Note: A processing option for some forms allows you to enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers & Supervisor form. After you set up the default values and the processing option, the information displays automatically on any work orders that you create if the category code criterion is met. You can either accept or override the default value.
Manager	The address book number of a manager or planner. Note: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the information displays automatically on any work orders that you create if the category code criterion is met. (You can either accept or override the default value.)

Setting Up Approvals for Work Orders

You can control approvals for work orders by establishing activity rules and approval routing and setting up user profiles.

Use activity rules to determine the status of a work order at any point in the life cycle. Use approval routing to notify individuals when a work order requires their approval. You must set up user profiles for all individuals who are designated to approve work orders.

Setting up approvals for work orders consists of the following tasks:

- ❑ Setting up activity rules for work orders
- ❑ Setting up approval routes for work orders
- ❑ Setting up user profiles

Setting Up Activity Rules for Work Orders

For work orders, use activity rules to:

- Determine the status of a work order at any point in the life cycle
- Select work orders for certain procedures
- Prepare reports that are based on the current status of a work order
- Specify whether the work order is active or inactive at a particular status

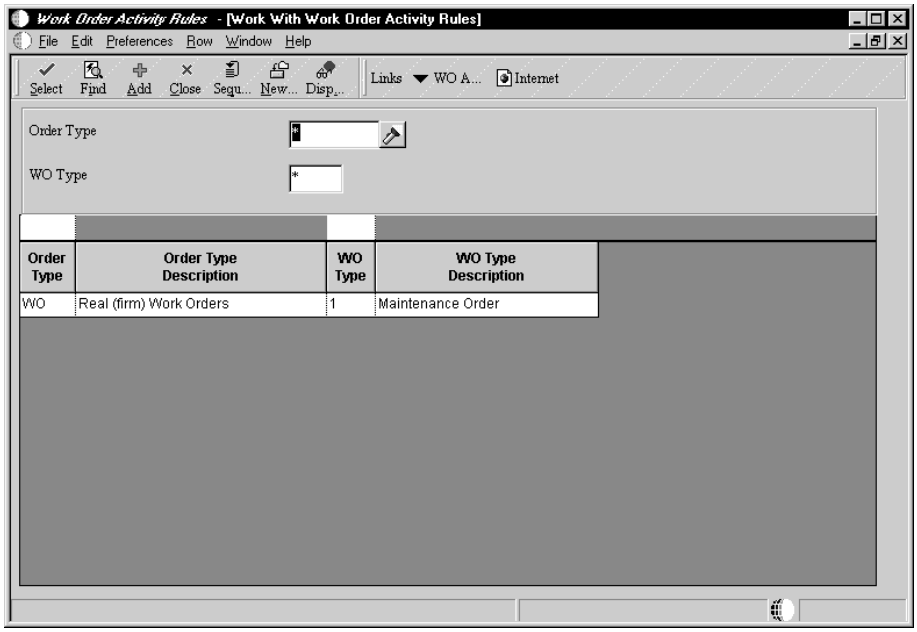
You can define activity rules that differ by document type (such as engineering change orders) and classification (such as rework orders).

You must set up a reject code as the last status for any set of activity rules.

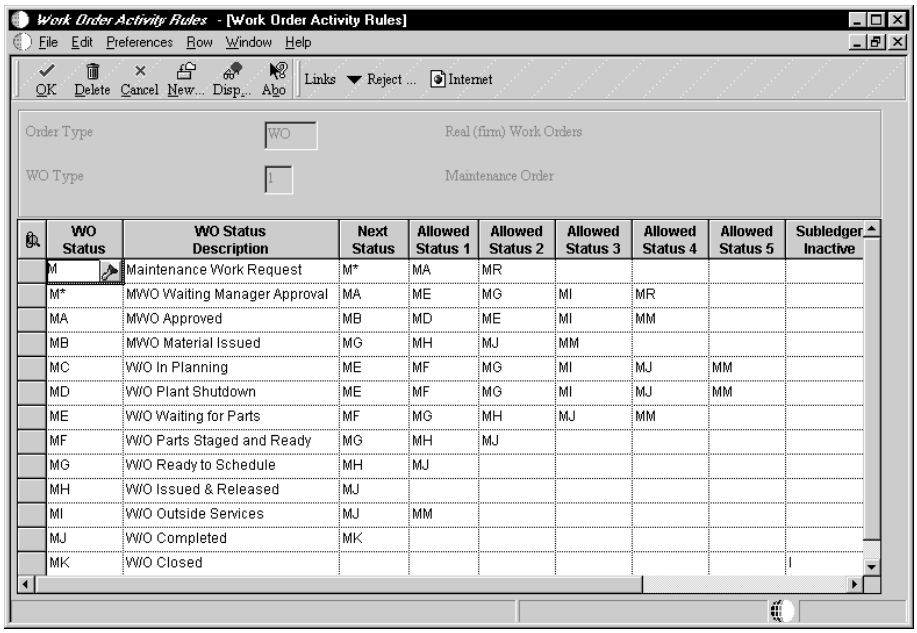
To set up activity rules for work orders

From the Work Orders Setup menu (G4841), choose Work Order Activity Rules.

On Work With Work Order Activity Rules



1. Click Add.



2. On Work Order Activity Rules, complete the following fields:

   - Order Type

     This user defined code identifies the document type and determines how transactions are processed by the general ledger.

   - WO Type

     This user defined code classifies work orders, such as maintenance work orders.

3. To define the activity rules for this classification of work orders, complete any of the following fields:

   - WO Status
   - Next Status
   - Allowed Status 1
   - Allowed Status 2
   - Allowed Status 3
   - Allowed Status 4
   - Allowed Status 5

   Note that each row accounts for a specific rule.

   You must set up status codes for work orders on Work Order Activity Rules before you can use them in the Next Status field or Allowed Status fields.

On Work Order Activity Rules, do not delete a status code that you have also defined as a next status or other allowed status.

4. For each rule that you defined, complete the following optional fields:

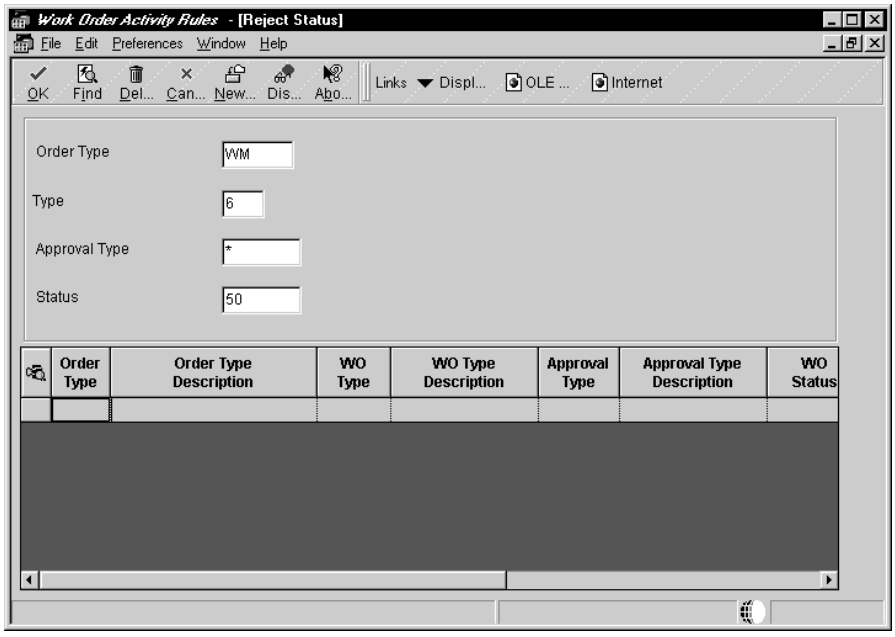
   - Subledger Inactive
   - Maint Status

     Maintenance Status is only used for equipment.

   - Lock Flag

5. To assign a reject status to a rule, choose the appropriate rule, and choose Reject Status from the Row menu.

   Note that reject status is only used for approvals.



6. On Reject Status, complete the following field and click OK:
    - Reject Status

Field	Explanation
Order Type	A user defined code (00/DT) that identifies the type of document. The Engineering Change Management system uses type EN for engineering change orders. . . . . . *Form-specific information* . . . . . . Enter the work order document type for which these rules apply.
WO Type	A user defined code (00/TY) that indicates the type classification of a work order or engineering change order. You can use work order type as a selection criteria for work order approvals.
WO Status	A user defined code (00/SS) that describes the status of a work order or engineering change order. Any status change from 90 thru 99 automatically updates the date completed.
Next Status	The next status for a work order, according to the work order activity rules, as the work order flows through the chain of approval. You must define a status code as a work order status in the Work Order Activity Rules table before you can use it as a next status.

Field	Explanation
Allowed Status 1	This is an optional field that indicates a status that can be performed as the next step in the order process. Although this is not the preferred or expected next step, this field is an allowed override. The system does not allow you to initiate an order line step or status not defined as either the expected next status or an allowed status. Other allowed status codes let you bypass processing steps. In processing options, these codes are often referred to as override next status codes. You must define a status code as a work order status in the Work Order Activity Rules table before you can use it as a next status or another allowed status.
Subledger Inactive	A code in WorldSoftware, or an option in OneWorld software, that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive. Examples are jobs that are closed, employees that have been terminated, or assets that have been disposed. If a subledger becomes active again, set this field back to blank. If you want to use subledger information in the tables for reports but want to prevent transactions from posting to the master record, enter a value other than blank in this field.
Maint Status	A user defined code (12/MS) that indicates the maintenance status of a piece of equipment, such as 50 for maintenance due or 60 for waiting for parts. Note: Status code 98 is reserved for canceled maintenance. Status code 99 is reserved for completed maintenance. Status code 01, the default, is reserved for initial maintenance setup.
Lock Flag	A code that determines whether a work order can be changed at a particular status. The lock applies to records in both the Work Order Master table (F4801) and the Work Order Instruction table (F4802). Values are: blank Do not lock the work order. 1 Lock the work order. 2 Lock the work order with a completion date. 3 Do not lock the work order with a completion date. 4 Lock the work order with a parts list and routing. 5 Lock the work order with a completion date, parts list, and routing. 6 Lock the document type and the work order type.
Reject Status	The reject status is the status that the work order will default to if an approver rejects a work order.

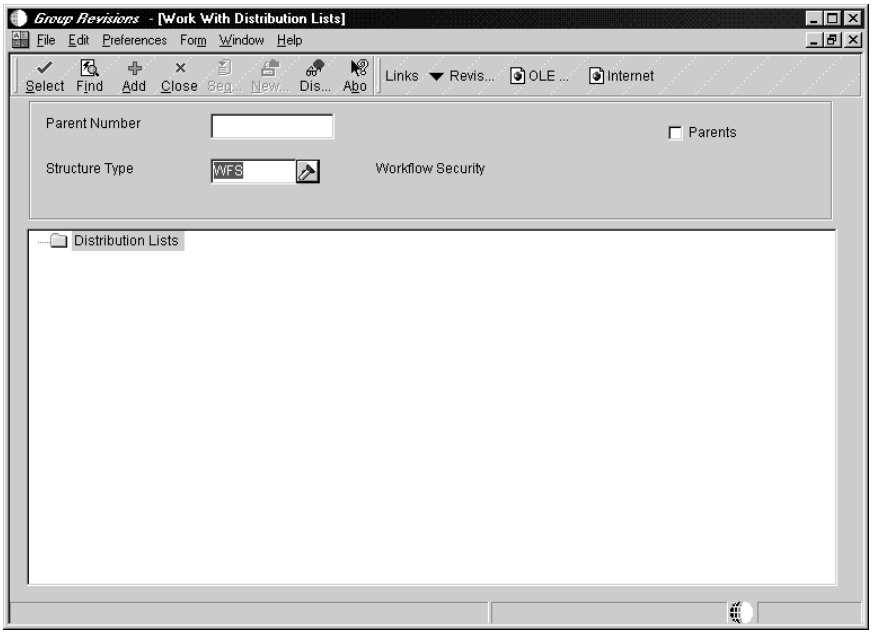
Setting Up Approval Routes for Work Orders

You can use address book numbers to create various approval routes for individuals who need to be notified when a work order requires their approval. You can also establish specific approval routes based on approval type and monetary amount.

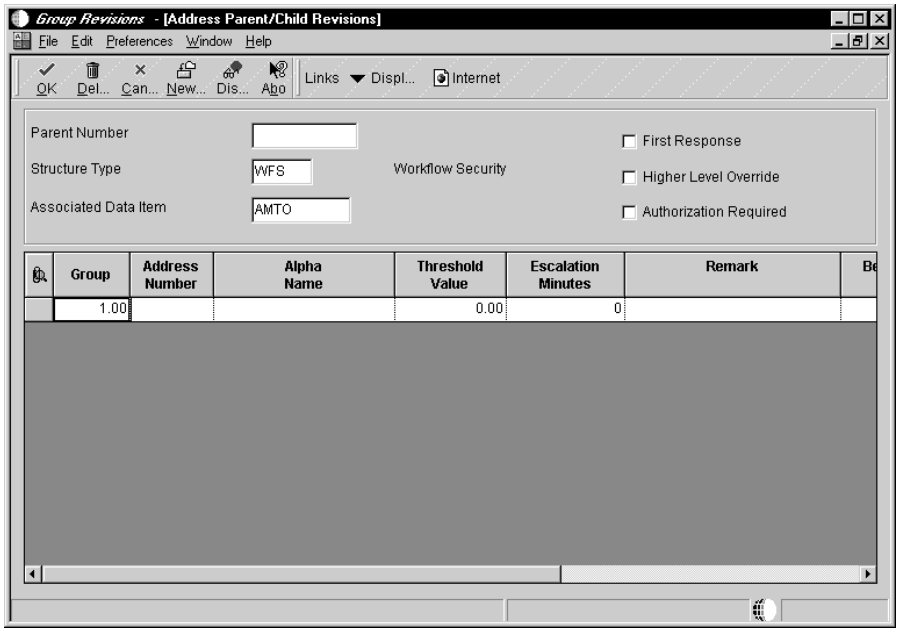
To set up approval routes for work orders

From the Workflow Management Setup menu (G0241), choose Group Revisions.

On Work With Distribution Lists



1. Click Add.



2. On Address Parent/Child Revisions, complete the following field to define the characteristics of the approval route:
   - Parent Number
3. Type WFS in the following field:
   - Structure Type
4. Type AMTO in the following field:
   - Associated Data Item
5. Click any of the following options:
   - First Response
   - Higher Level Override
   - Authorization Required
6. For each approver in the route, complete the following fields:
   - Group
   - Address Number
7. Complete the following optional fields for each approver and click OK:
   - Threshold Value
   - Remark
   - Begin Eff Date
   - End Eff Date
   - Escalation Hours

Field	Explanation
Parent Number	The Address Book number of the parent company. The system uses this number to associate a particular address with a parent company or location. For example: • Subsidiaries to parent companies • Branches to a home office • Job sites to a general contractor If you leave this field blank on an entry screen, the system supplies the primary address from the Address Number field. This address must exist in the Address Book Master table (F0101) for validation purposes. . . . . . *Form-specific information* . . . . . The Address Book number of the primary level in a heirarchy, or reporting relationship. A parent in one hierarchy can be a child in another hierarchy. A hierarchy can be organized by business unit, employee, or position. For example, you can create a hierarchy that shows the reporting relationships between employees and supervisors.

Field	Explanation
Structure Type	A user defined code (01/TS) that identifies a type of organizational structure with its own hierarchy in the Address Book system (for example, Accounts Receivable or e-mail). When you create a parent/child relationship for a customer or supplier, the structure type must be blank. . . . . . *Form-specific information* . . . . . . Identifies the type of distribution list, such as WFS for workflow, ORG for group, and EML for e-mail.
Associated Data Item	The data item used to retrieve the formatting information to use on the Threshold Value.
First Response	If this field is checked it indicates that if a workflow message is sent to the members of an organizational structure, that only one of them must respond. When that first response is received by the workflow system, the other messages to the other members of the group are canceled and the activity is marked as complete. If this field is not checked, all members of the group that the workflow message is sent to must respond before the activity can be considered complete.
Higher Level Override	If this field is checked and a person in a higher level group manually approves a workflow transaction (via a workbench program), then all lower level groups will be marked as bypassed. If it is not checked, then if a person in a higher level group manually approves the transaction, the action is logged, and all lower level groups are still required to approve the transaction.
Authorization Required	If this field is checked and a person on the organizational structure enters a workflow transaction that goes through the organizational structure, the next higher person must be sent the message, even if the threshold has not been reached for the higher person. If the field is not checked, no higher person is required to see the message as long as it is below the threshold.
Group	A number that reorders a group of records on the form.
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.
Threshold Value	The value used to determine if certain individuals within the organizational structure should be included in the approval of a workflow activity. This can be any numeric field such as an amount, quantity, percentage, and so on.

Field	Explanation
Begin Eff Date	The date on which the address book record will appear in the structure. The Beginning Effective Date field will prevent the address number from occurring in the structure until the beginning effective date is the same as the current date. If left blank, the address number will always occur in a structure unless there is an ending effective date.
Escalation Hours	The amount of time before a message is escalated.

Processing Options for Group Revisions

```
Defaults

      1.)  Enter the default Structure          _____________
      Type
      2.) Enter the Version of                  _____________
      Organizational Structure Revisions
      to call.  If left blank version
      ZJDE0001 will be used.
```

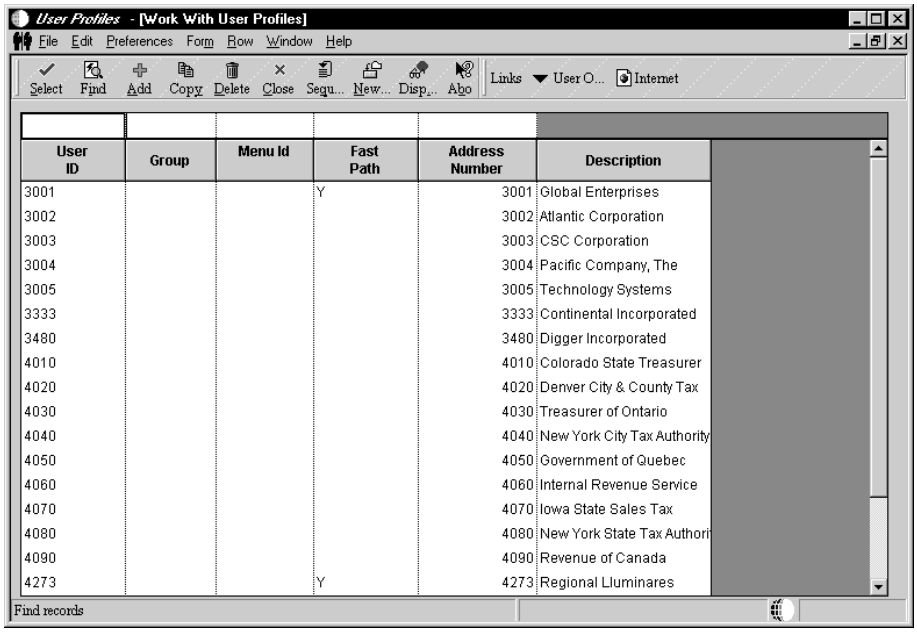
Setting Up User Profiles

You must set up user profiles for all individuals who are designated to approve work orders. When an approver enters a password to complete the approval process, the system validates the password against the employee address book number that you set up in the approver's user profile.

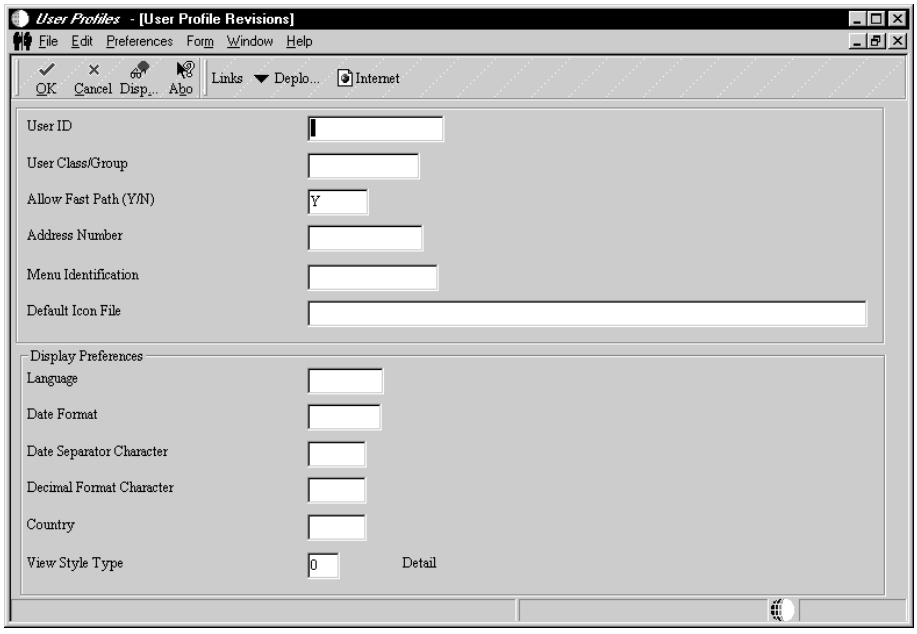
▶ To set up user profiles

From the System Administration Tools menu (GH9011), choose User Profiles.

On Work With User Profiles



1. To locate a user, click Find to select from a list, or complete the following field and click Find:
   - User ID
2. Choose the appropriate user and click Select.



3. On User Profile Revisions, complete the following field:
   - Address Number
4. Complete any of the remaining optional fields.

Processing Options for User Profile

A/B Validation

Enter a ’1’ to enable editing on address book number against the F0101. _____

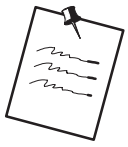
Setting Up Formats for Record Types

You use record types to organize the detail information that you track for work orders. For example, you can organize information, such as original task description, tools required, and safety provisions. You can use Detail Specification Over Titles to control the format for these record types.

The format that you set up determines how the system displays the information. For each record type that you use, you can specify a text format or a format that includes text with three columns. The columnar format is particularly useful when you need to organize and track more than one type of information within a record type. For example, you can set up a record type for tools required and choose a three-column format to distinguish tools that are needed for different procedures, such as the following:

- Setup
- Production
- Teardown and cleanup

When you use the format for text plus three columns, you must specify at least one of the column headings. Formats that are all text do not include headings. If you specify even one column heading for a record type, the format changes to text plus three columns.



When you change the format of a record type, the system updates the format of that record type for all work orders.

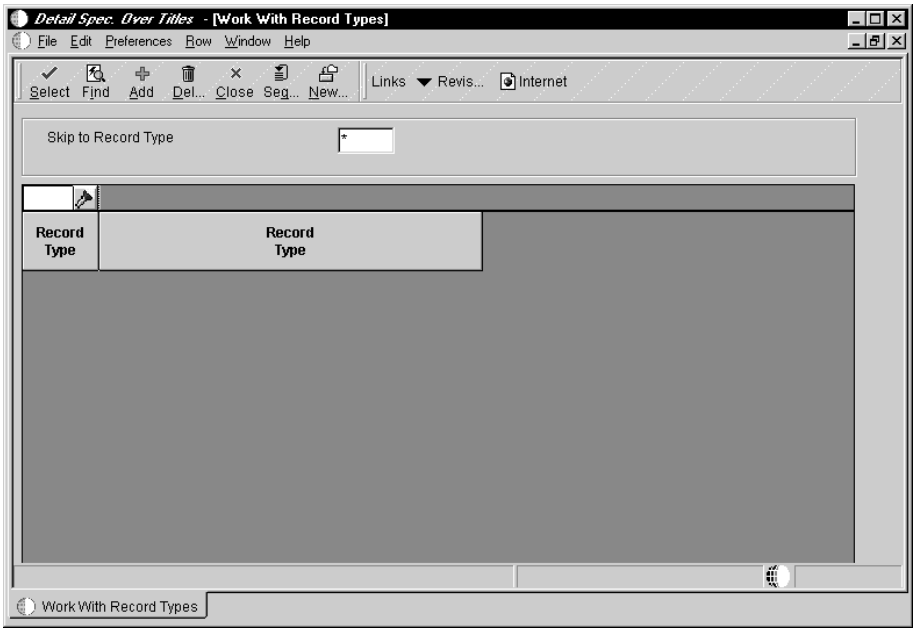
Before You Begin

❑ Set up work order record types. See *Setting Up User Defined Codes* for more information about setting up work order record types.

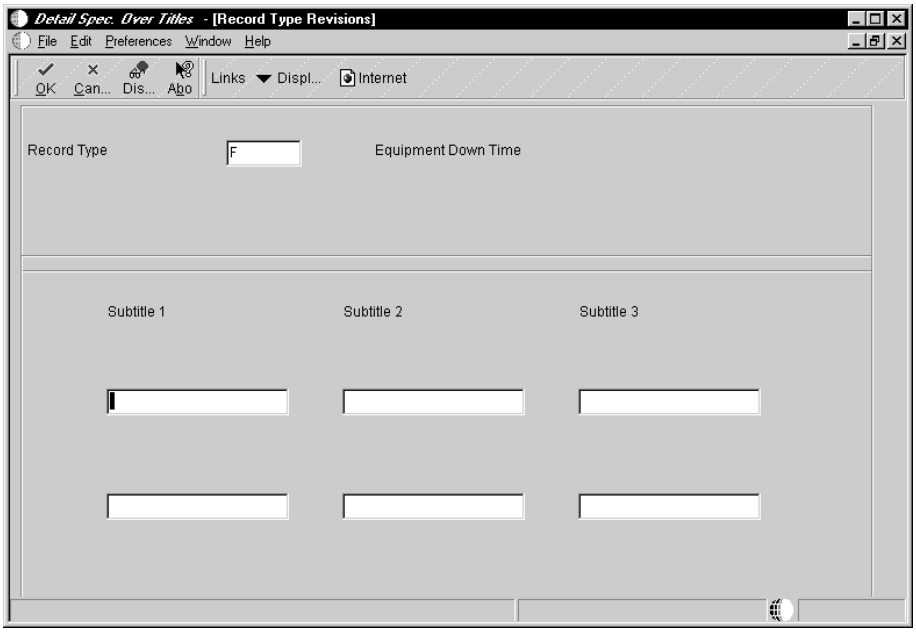
To set up formats for record types

From the Work Orders Setup menu (G4841), choose Detail Spec. Over Titles.

On Work With Record Types



1. Click Add.



2. On Record Type Revisions, complete the following field:
   - Record Type
3. To define text for column headings, complete the following fields:
   - Subtitle 1
   - Subtitle 2
   - Subtitle 3

Field	Explanation
Record Type	The detail specification record type. Record types are user defined. You can set them up on the Detail Specification Types form and use them to describe certain types of work order or engineering change order information.
Subtitle 1	A subtitle, description, remark, name, or address. The text you type in this field appears as a column head on the Work Order Detail Entry form for the record type indicated.

Setting Up Supplemental Data for Work Orders

You can enter supplemental data to further define the work orders in your system. Supplemental data is useful for reporting and tracking work order details that are not included in the record types, such as a data type for safety procedures.

You set up and maintain supplemental data by work order database. Work order databases are user defined codes (system 00, type WD). For example, you might set up supplemental data for an engineering change order database. The data types might include detail types, pending orders, and so on. You can set up your system to validate the values that you enter on supplemental data forms against the values that you set up in user defined code tables.

If your specification data type does not relate to an existing user defined code or generic message code, you can set up a new user defined code table. J.D. Edwards recommends that you use systems 55 through 59 to set up the new tables. User defined code tables that you set up for these systems are not modified during any reinstall processes.

Before You Begin

❑ Set up a user defined codes table for work order databases for supplemental data. See *Setting Up User Defined Codes*.

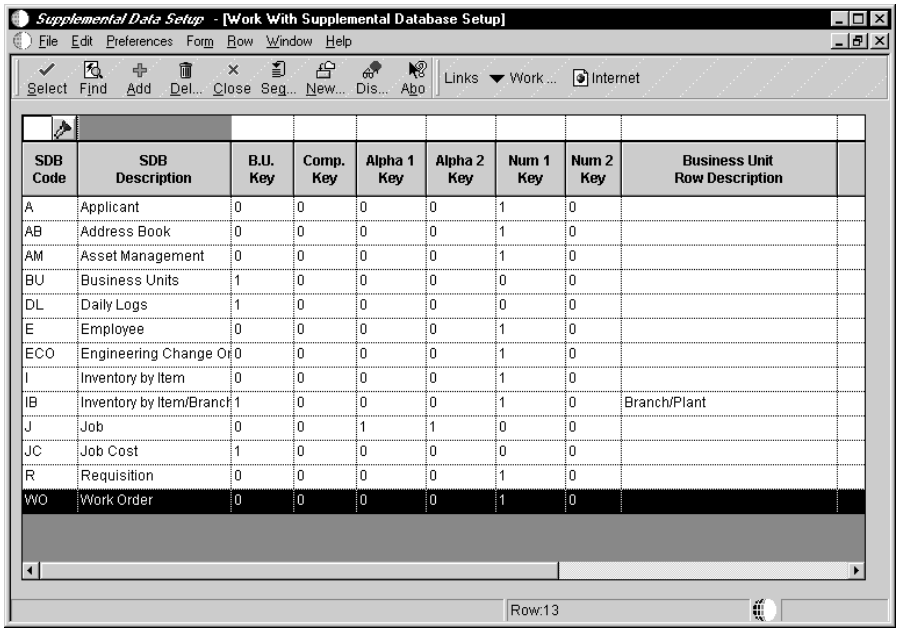
See Also

- *User Defined Codes* in the *OneWorld Foundation Guide* for additional information about user defined codes

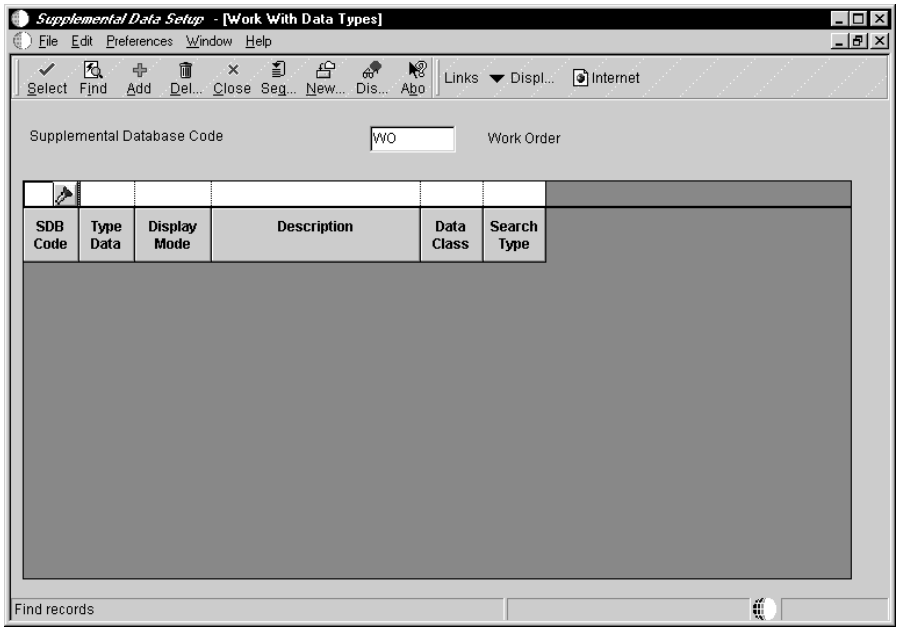
To set up supplemental data for work orders

From the Work Orders Setup menu (G4841), choose Supplemental Data Setup.

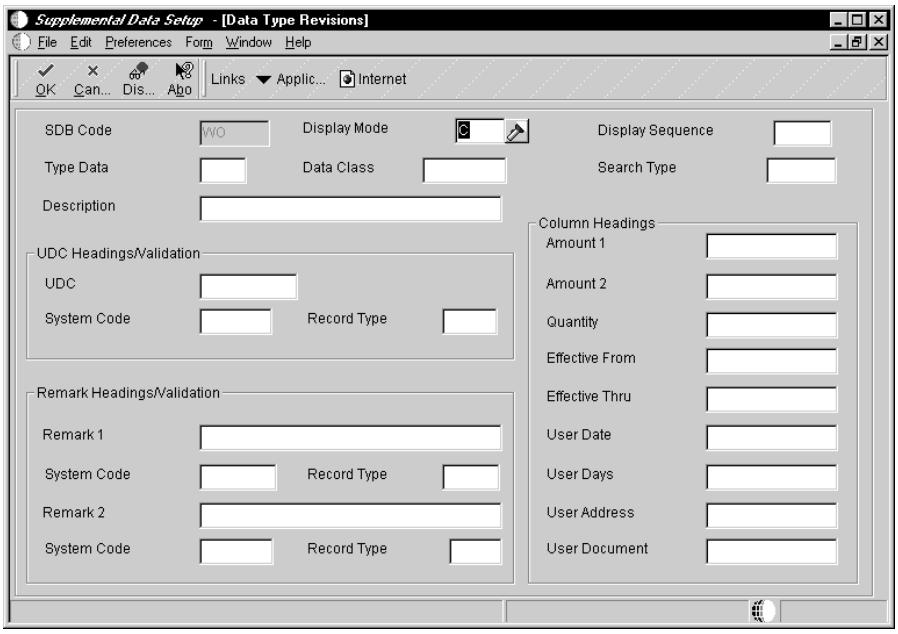
On Work With Supplemental Database Setup



1. Click Find.
2. Choose the appropriate database (such as WO, Work Order) and choose Work With Data Types from the Row menu.



3. On Work With Data Types, click Add.



4. On Data Type Revisions, complete the following fields:
   - Display Mode

     Enter C, O, or N as appropriate.

   - Type Data
5. Complete the following optional fields:
   - Display Sequence
   - Data Class
   - Search Type
6. In the UDC Headings/Validation section, complete the following fields as needed:
   - UDC
   - System Code
   - Record Type
7. In the Remark Headings/Validation section, complete the following fields as needed:
   - Remark 1
   - System Code
   - Record Type
   - Remark 2

- System Code
- Record Type

8. In the Column Headings section, complete the following fields as needed:
   - Amount 1
   - Amount 2
   - Quantity
   - Effective From
   - Effective Thru
   - User Date
   - User Days
   - User Address
   - User Document

Field	Explanation
Display Mode	The format of a data type. This code determines the display mode for supplemental data. Valid codes are: C Code format, which displays the form for entering code-specific information. These codes are associated with User Defined Codes table (F0005). N Narrative format, which displays the form for entering narrative text. P Program exit, which allows you to exit to the program you specified in the Pgm ID field. M Message format, which displays the form for entering code-specific information. However, the system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.
Type Data	A code that identifies a specific type of data within a classification.
Display Sequence	A number that reorders a group of records on the form.
Data Class	A user defined code that identifies a group of data types in the Central Information File.

Field	Explanation
Search Type	A user defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists T Tax authority
UDC	The heading for a column on Supplemental Data Entry that relates to user defined codes. Enter the user defined codes for the supplemental data type in this column. For example, if the supplemental data type relates to the educational degrees of employees (BA, MBA, PHD, and so on), the heading could be Degree.
System Code	A user defined code (98/SY) that identifies a J.D. Edwards system. . . . . . *Form-specific information* . . . . . . The system for the user defined code that is related to the data type. This field works with the RT field to identify the code type table against which the system verifies the data type. If the SY and RT fields are blank, the system does not verify the data type. For example, a valid code for data type SKILL (skills) must exist in the table for system 08 and code type SK. If you enter a skill code that is not in the table, the system displays an error message. This field applies only to the code format (C) data types.
Record Type	A code that identifies the table that contains user defined codes. The table is also referred to as a code type.
Remark 1	The heading for a column on Supplemental Data Entry that relates to user defined codes. This heading describes the first Remark field on the data entry form. It contains additional information and remarks. For example, if the data type relates to bid submittals, the heading could be Subcontractor.
System Code	A code used to designate the system number. See user defined codes, system 98/type SY.
Record Type	A code used to designate the type of the record. Most often, it is used to obtain records in the User Defined Codes file (F0005). It is defined in the User Defined Code Types file (F0004).

Field	Explanation
Remark 2	The heading for a column on Supplemental Data Entry that relates to user defined codes. This heading describes the second Remark field on the data entry form. It contains additional information and remarks. For example, if the data type relates to the educational degrees of employees, the heading could be College or University.
System Code	A code used to designate the system number. See User Defined Codes, system code '98', record type 'SY'.
Record Type	A code used to designate the type of the record. Most often, it is used to obtain records in the User Defined Codes file (F0005). It is defined in the User Defined Code Types file (F0004).
Amount 1	The heading for a column on Supplemental Data Entry that relates to an amount. This column contains statistical or measurable information. For example, if the data type relates to bid submittals, the heading could be Bid Amounts.
Amount 2	The title of a row heading that appears next to the Amount 2 field (AMTV). For example, if you set up a record type for stock options, a possible row title for the second amount field might be Strike Price.
Quantity	This code is used for the column heading of a User Defined Quantity to be tracked within the supplemental data. For example, if you want to keep track of Quantity to be Scrapped, a logical column heading would be Scrapped.
Effective From	The title of a supplemental data column heading for the Date field (EFT). For example, a possible column heading for the date field linked to the education data type might be Graduation.
Effective Thru	The title of a row heading you can use to describe the Date field (EFTE). For example, if you set up a record type for professional licenses, a possible row title for the date field might be Expires.
User Date	The title of a supplemental data column heading for the Additional Date field (UPDJ). For example, a possible column heading for the date field linked to the education data type might be Graduation.
User Days	The title of a supplemental data column heading for the User Defined Days field (DYUD). For example, a possible column heading for the days field linked to scheduling data type might be Lead Time.
User Address	The title of a supplemental data column heading for the User Address field (AN8). For example, a possible column heading for the address field linked to an education data type might be the College Address.

Field	Explanation
User Document	The row heading that is used to describe the order field.

Setting Up Accounting Rules for Work Orders

If you apply charges to work orders using the speed entry code on Time Accounting or Payroll forms, you must set up your system to distribute the charges to the proper object account. You set up these object accounts on the Accounting Rules table.

At a minimum, you must set up an object account for default company 00000. You can set up object accounts for other companies as well. The system always searches for accounting rules by a specific company. If no company is found, the system applies rules according to the default company.

Before You Begin

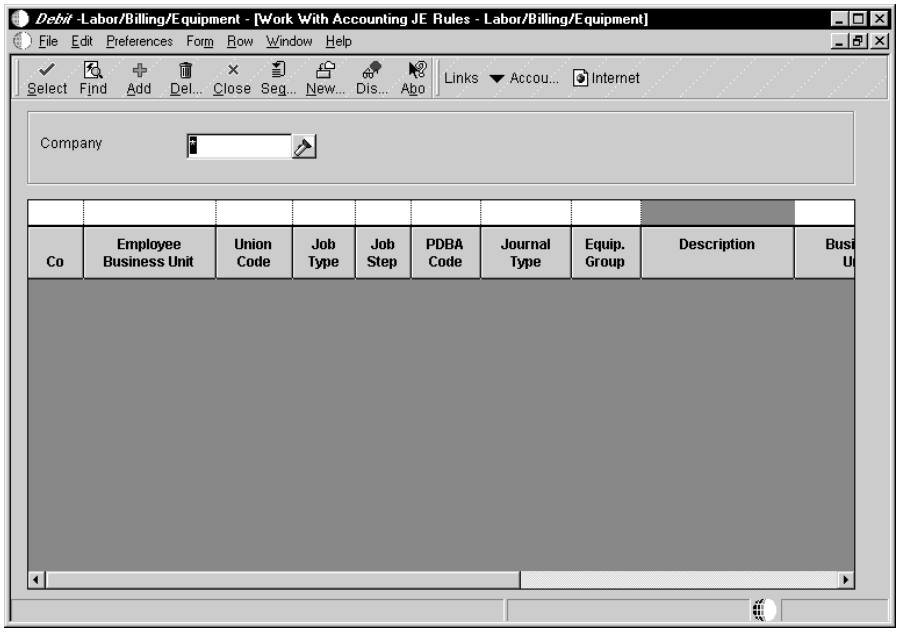
❑ Verify that you have installed at least one of the following systems:

- HR and Payroll Foundation (system 05)
- Stand-alone Time Accounting (system 05T)
- Payroll (system 07)
- Payroll (Canadian system 77)

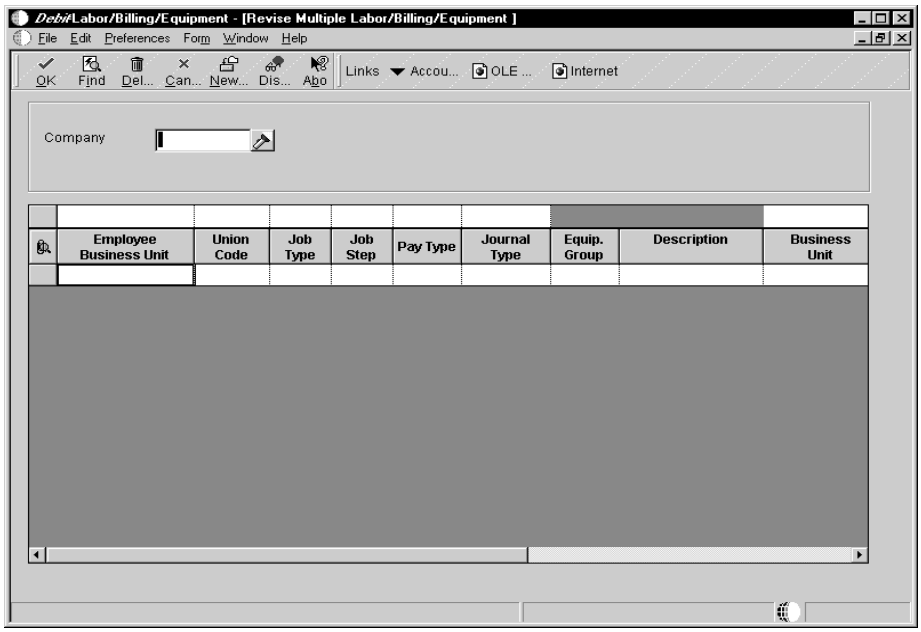
To set up the accounting rules for work orders

On the Time Accounting Setup menu (G05BT4), choose Debit–Labor/Billing/Equipment.

On Work With Accounting JE Rules – Labor/Billing/Equipment



1. Click Add.



2. On Revise Multiple Labor/Billing/Equipment, complete the following fields:
   - Company
   - Journal Type
   - Object Account
3. Complete the remaining optional fields as needed.

Field	Explanation
Company	A code that identifies a specific organization, fund, entity, and so on. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions. NOTE: You can use Company 00000 for default values, such as dates and automatic accounting instructions (AAIs). You cannot use Company 00000 for transaction entries.
Journal Type	This field represents the type of transaction for which an account is to be derived.
Object Account	The object account portion of a general ledger account. The term "object account" refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories (for example, dividing labor into regular time, premium time, and burden). If you are using a flexible chart of accounts and the object account is set to 6 digits, J.D. Edwards recommends that you use all 6 digits. For example, entering 000456 is not the same as entering 456, because if you enter 456, the system will enter three blank spaces to fill a 6-digit object.

Advanced & Technical

Global Updates

Use global update programs to update the work order information in your system or to make system-wide changes that affect all of your work orders.

Global updates consists of the following tasks:

- ❑ Updating the phase and equipment number
- ❑ Purging closed work orders

Updating the Phase and Equipment Number

From the Advanced Technical Operations menu (G4831), choose Update Phase/Equip No. in G/L.

If you post work order transactions to the general ledger and then change the equipment number and the phase code on the work order, you should run this update to ensure that the Account Ledger table (F0911) reflects the most current work order information. You can use this program to reflect changes to the phase code and equipment number for multiple work orders. You can also use this program to enter a value in the phase field on many general ledger transactions.

When you select this update program, the system submits the job directly to batch processing.

Before You Begin

- ❑ Back up the Work Order Master table (F4801). See *Backing Up OneWorld Tables* in the *Server and Workstation Administration Guide.*
- ❑ Ensure that no one accesses or modifies the Work Order Master table while you run this procedure.

Purging Closed Work Orders

From the Advanced Technical Operations menu (G4831), choose Work Order Purge.

You can purge work orders from your system to free space and to make your system operate more efficiently. After you purge a work order, it no longer exists in your system.

The Work Order Purge program deletes the work order records that you specify, including any associated record types and approval records. The program does not create a purge table or a report.

Appendices

Appendix A: Workflow Concepts and Setup

This appendix contains important conceptual and setup information that you need to know regarding the integration of Workflow Management and Work Orders. For a comprehensive overview of Workflow Management, refer to the *Enterprise Workflow Management Guide.*

The appendix includes the following information:

- An overview that describes the major features of Workflow Management as it applies to Work Orders
- A table of terms and concepts specific to Workflow Management
- A section describing workflow setup considerations for Work Orders
- An example of a workflow process for a typical work order

About Workflow Management for Work Orders

Workflow Management offers a powerful means of automating various components of the work order life cycle across your entire enterprise. Documents, information, and tasks pass efficiently from one participant to another for action, based on a set of procedural rules and triggering events, and requiring minimal user involvement. For example, you can use workflow to do the following:

- Route a work order for approval
- Commit inventory to a work order
- Run the capacity plan for a work order
- Send messages to appropriate personnel regarding the progress of a work order

In addition, Workflow Management enables you to do the following:

- Define any number of workflow processes, according to your business needs
- Attach any workflow process to any given event within an application
- Execute conditional processing, which is logic contingent upon supplied criteria, such as currency amount, status, and priority

Terms and Concepts

You do not need a comprehensive knowledge of the Enterprise Workflow Management system to set up and use Workflow Management, but you must be familiar with the following terms and concepts:

Routes

Routes define the path along which the Workflow system moves a work order. Depending on your needs, a route can be relatively simple and sequential, or increasingly complex, with joins or splits, parallel routing, iterative routing, such as a loop, and so on.

Process rules

Process rules define what information is to be routed and to whom. For example, you can set up rules that define conditions that a work order must meet before the Workflow Management system advances the order to the next activity in the process, as well as rules that govern who receives an approval request. Workflow Management uses the following process rules:

- Activity conditions determine the next activity, based on information that you set up in an attribute data structure, such as work order status.
- Recipient rules determine the recipient to which the system routes messages.

As with routes, you determine the complexity of rules according to your needs. For example, you can set up logic by which a work order can only progress to the next step if predefined threshold values have been met.

Workflow processes

Workflow processes refer to processes that you have set up to be handled through scripted workflow. For each process that you define, you can do the following:

- Set up criteria that indicates the start and end of the process.
- Determine the workflow activities involved in the process, such as sending an approval message, calling an application, or launching a sub-process.
- Determine the relevant data that the system requires to complete the process.
- Determine the path, such as an approval route, that a process takes, and whether the process is contingent upon some conditional value, such as work order status, amount, or date. Activity conditions determine the next workflow activity in the process.

You can set up a hierarchy of processes, creating nested sub-processes so that one process calls another. This is especially useful when you need to reuse components within other processes. For example, the initial workflow process for work orders determines the document type of the work order and calls other processes based on the document type, such as the process to determine the work order type.

For more information about Workflow processes, see *Considerations for Setting Up Workflow Processes* elsewhere in this appendix.

Workflow activities

Workflow activities refer to the specific actions within a given process, such as sending a request for approval or committing inventory. In addition to the Start activity, which every process must include, you can attach other types of activities to a process, as follows:

- Function
- Interactive application
- Batch application
- Run executable
- Message
- Halt process
- Process

For a more detailed description of each type of activity, see *Considerations for Setting Up Workflow Activities* elsewhere in this appendix.

Primary data structures

The primary data structure contains the data that makes an instance of a process unique from another instance. In Work Orders, where workflow processes are set up primarily for events in the work order life cycle, the primary data structure typically consists of the work order number.

J.D. Edwards strongly recommends that you do not use multiple data items within a data structure. To do so might increase the possibility of system errors.

See *Setting Up Workflow Data Structures* in the *Enterprise Workflow Management Guide* for a complete explanation of primary data structures.

Attribute data structures

Attribute data structures contain all pieces of data that a given process and any activity within the process need to complete the flow. Workflow Management uses the attribute data structure to communicate between activities within a process.

Workflow Setup Considerations for Work Orders

This section provides important setup considerations and requirements to be aware of when you set up Workflow Management for Work Orders. Use the information in this section in conjunction with the *Enterprise Workflow Management Guide*. It is beyond the scope of this appendix to provide detailed setup procedures for Enterprise Workflow Management.

This section includes the following setup topics relevant to scripted workflow:

- Considerations for setting up workflow processes
- Considerations for setting up workflow activities
- Considerations for adding process rules

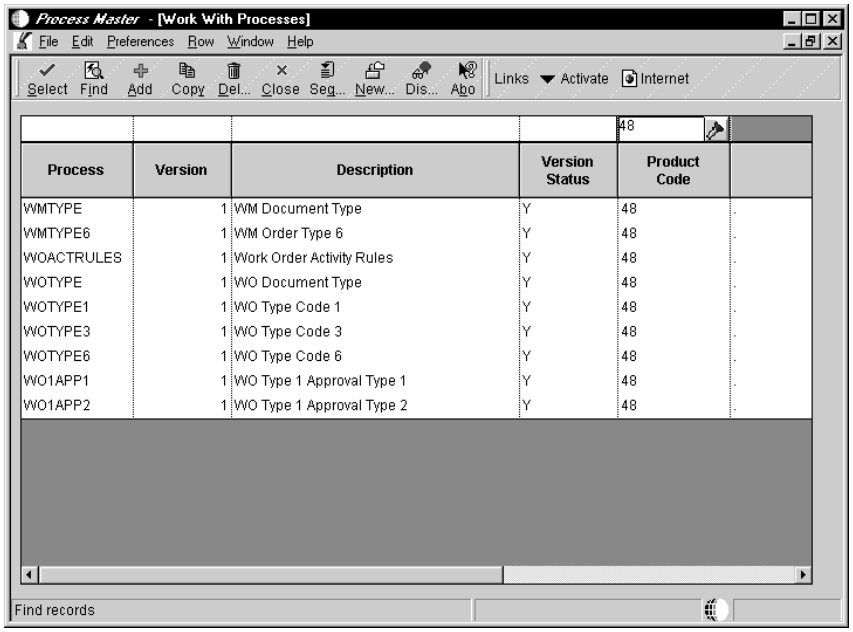
For any given setup task, J.D. Edwards provides demonstration data. You can use the data provided or customize it to meet your needs.

Considerations for Setting Up Workflow Processes

A workflow process contains activities and related sub-processes specific to a particular function that you want to automate through Workflow Management. J.D. Edwards provides the Work Orders system with predefined workflow processes specific to the work order life cycle. You can modify or add to these processes, if necessary. Typically, you need to customize workflow processes to meet the needs of your organization. An example of a predefined process for Work Orders is the process for Work Order Approval.

You can have multiple versions of a workflow process. However, the system allows only one version of a process to be activated at a time. You specify whether a version is activated by choosing the version on Work With Processes and then choosing either Activate or Deactivate from the Row menu.

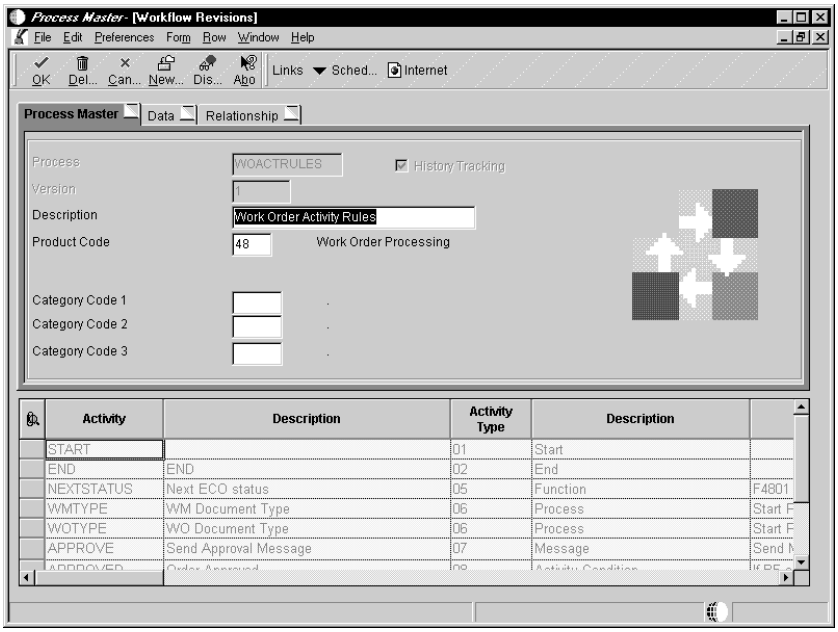
Work With Processes Form



From the Workflow Management Setup menu (G0241), choose Process Master.

On the Work With Processes form, you can search for predefined processes or add new processes.

Workflow Revisions Form, Process Master Tab



From the Work With Processes form, choose a process and click Select, or click Add.

On the Process Master tab of the Workflow Revisions form, you can revise existing workflow processes or add new ones.

See Also

- *Creating a Workflow Process* in the *Enterprise Workflow Management Guide*

Considerations for Setting Up Workflow Activities

After you have set up workflow processes, you can add an unlimited number of activities to a process, choosing from the following types of predefined activities:

Function	This activity attaches a function for special logic processing, including any business functions that you write to perform a special function or operation.
Interactive application	This activity starts an interactive application. You can specify any interactive application to be called. You also define the parameters that are passed to the called application.
Batch application	This activity starts a batch application. You can launch any report or batch process at this point.

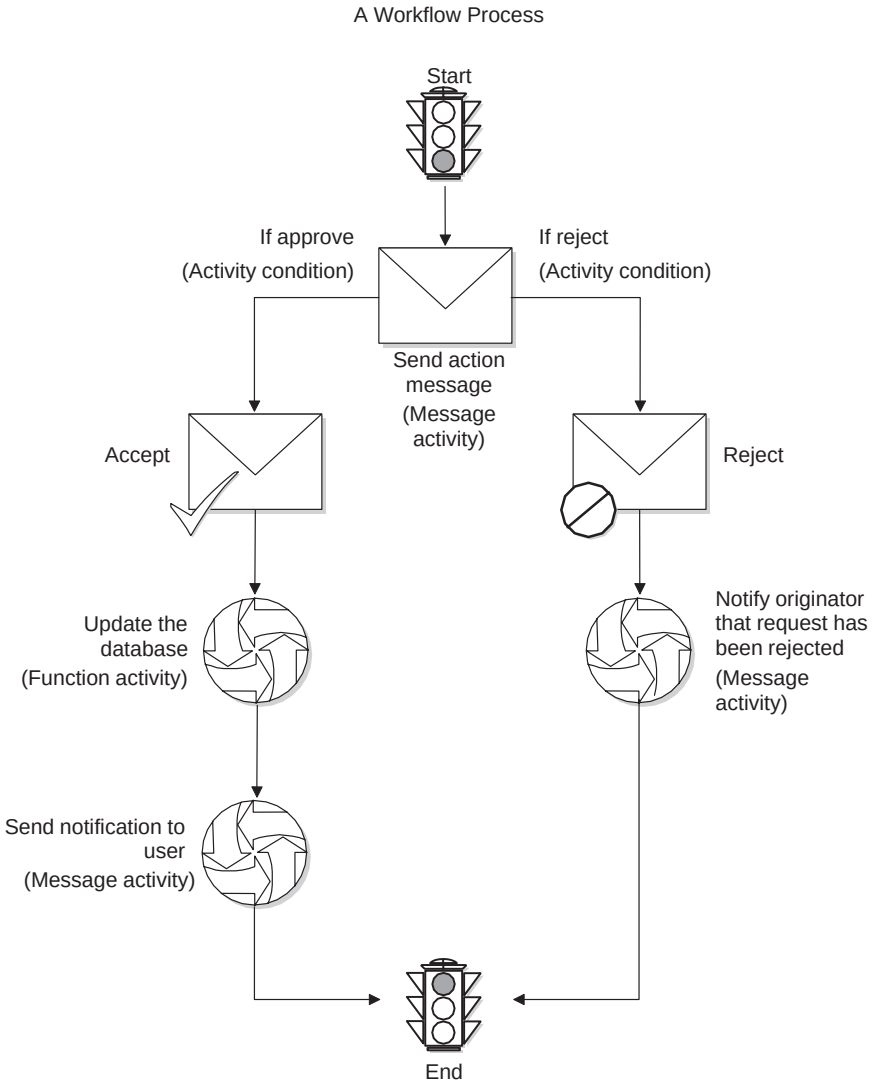
Run executable	This activity launches an executable program that you specify, such as a word processing application or a spreadsheet application.
Message	This activity generates a message. You define the messages in the Data Dictionary and set up variables regarding the delivery of the messages within Workflow Management. For example, you can specify that particular messages be sent to a distribution list, a specific person, or a specific mailbox.
Halt process	This activity stops the process for a period of time that you specify, after which the process resumes. If you do not specify a time, you must restart the process manually.
Process	This activity starts another process, also called a sub-process, which includes its own set of activities. You use the process activity to set up a hierarchy of processes, nesting them wherever appropriate.

In addition to the activities described above, each workflow process must begin with the Start activity. By default, whenever you set up a process and attach a Start activity, the system attaches the end activity.

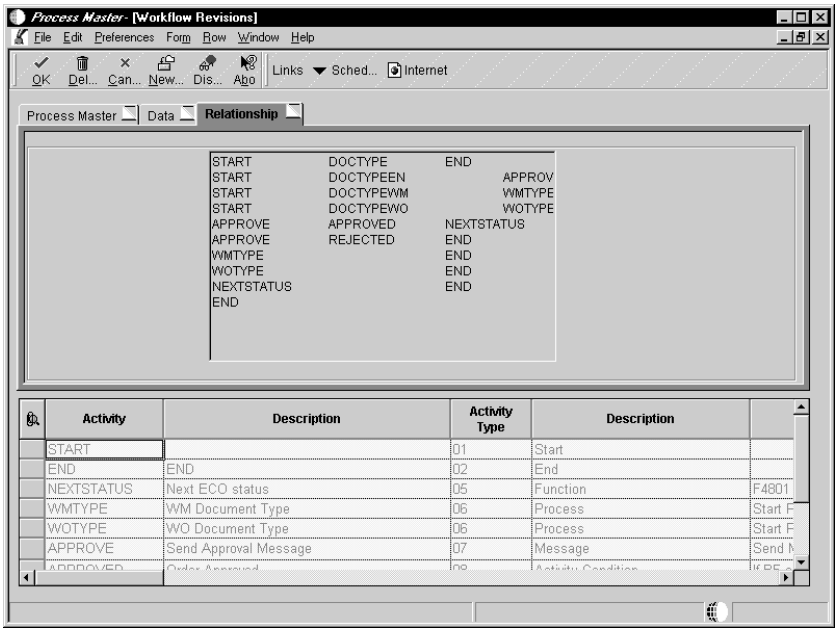
A typical workflow process (in this case, an approval process) with various types of activities attached is as follows:

- Send a message to the approver's queue
- If approved
    - Update the database
    - Send notification to user
- If rejected
    - Send notification back to the originator
- End process

The following graphic illustrates a typical approval workflow process:



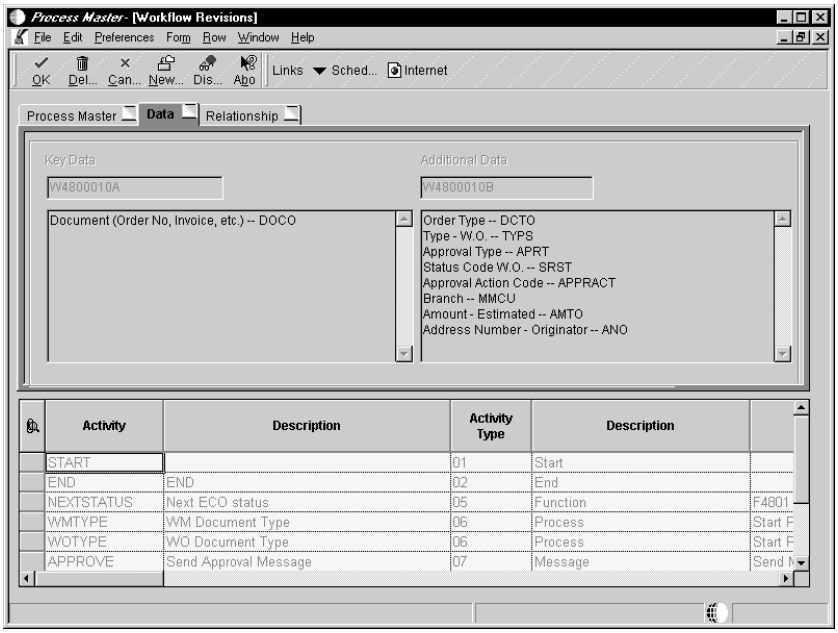
Workflow Revisions Form, Relationship Tab



From the Work With Processes form, choose a process and click Select, or click Add.

On the Relationship tab of the Workflow Revisions form, you can review all of the activities that are currently attached to a particular process.

Workflow Revisions Form, Data Tab



From the Work With Processes form, choose a process and click Select, or click Add.

On the Data tab of the Workflow Revisions form, you can review all of the data fields that are currently attached to a particular process.

Before you can revise an existing activity, you must deactivate the activity. Choose Deactivate from the Row Menu on the Work With Processes form.

See Also

- *Adding Activities to a Process* in the *Enterprise Workflow Management Guide* for more information about setup requirements for different activity types

Considerations for Adding Process Rules

After you have set up and attached activities to a workflow process, you must add process rules. Process rules are user defined and determine the conditions that must be met for Workflow Management to progress from activity to activity. The types of process rules are as follows:

Activity Conditions	Activity conditions determine which activity the system executes and the result of that activity. For example, a condition set up for an approval activity might change the status of a work order if the work order is approved, or send a rejection message to the originator if the work order is rejected.
Recipient Rules	Recipient rules determine to whom an activity is routed. You can add logic to a recipient rule, based on the structure of your organization. For example, you can specify that the system send messages to a particular distribution list when the approval type is 1, and another distribution list when the approval type is 2.

See Also

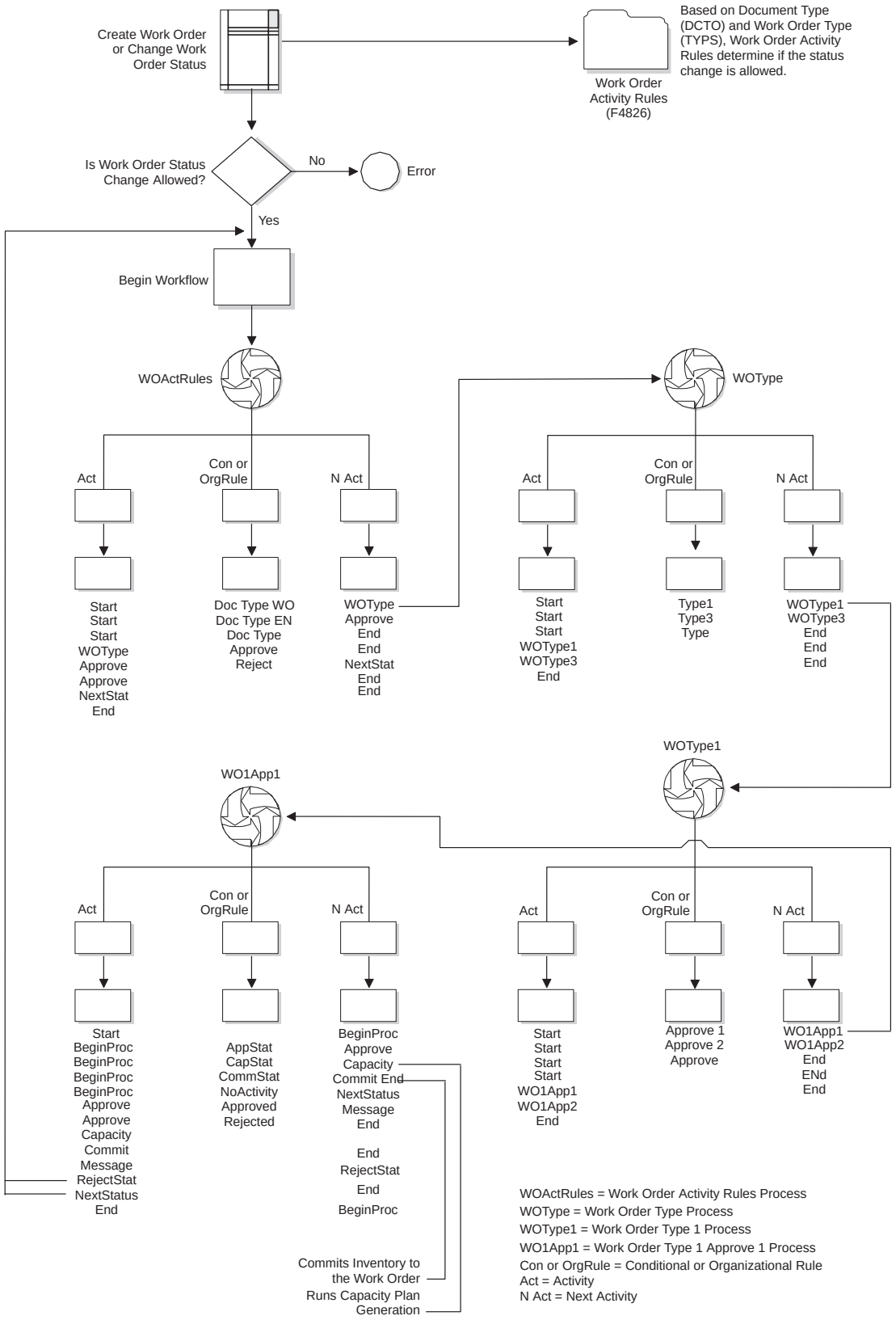
- *Adding Activity Conditions* and *Working With Recipient Rules* in the *Enterprise Workflow Management Guide*

Example: Work Order Approval Process

The following example shows how the various components of workflow management, such as processes, sub-processes, and activities, work together to provide a comprehensive workflow solution. The work order approval process represents a typical workflow process within Work Orders. By reviewing the example, you can determine the particular workflow components that require modification to meet your business needs.

In this example, the approval process for a work order differs, based on the document type and the work order type. Document type and work order type are elements of the attribute data structure that you must set up in order to use Workflow Management for approving work orders. The example charts the workflow for a work order with a document type of WO and a work order type of Type 1. Since document types and work order types are user defined codes, the codes that your organization uses will likely differ from the codes provided by J.D. Edwards in demo data.

In the example, the workflow process is initially triggered by the creation of a work order or any change made to the status of a work order. The system uses Work Order Activity Rules to determine if the status change is allowed. If the status change is not allowed, workflow does not begin and an error message appears. Otherwise, workflow begins normally. Regardless of any subsequent processes, the first workflow process for work orders is the WOACTRULES (Work Order Activity Rules) process. This process is hard-coded and cannot be modified.


Create Work Order or Change Work Order Status
Work Order Activity Rules (F4826)
Based on Document Type (DCTO) and Work Order Type (TYPS), Work Order Activity Rules determine if the status change is allowed.
Is Work Order Status Change Allowed?
No
Error
Yes
Begin Workflow
WOActRules
WOType
Act
Con or OrgRule
N Act
Start
Start
Start
WOType
Approve
Approve
NextStat
End
Doc Type WO
Doc Type EN
Doc Type
Approve
Reject
WOType
Approve
End
End
NextStat
End
End
Start
Start
Start
WOType1
WOType3
End
Type1
Type3
Type
WOType1
WOType3
End
End
End
WOType1
WO1App1
Start
BeginProc
BeginProc
BeginProc
BeginProc
Approve
Approve
Capacity
Commit
Message
RejectStat
NextStatus
End
AppStat
CapStat
CommStat
NoActivity
Approved
Rejected
BeginProc
Approve
Capacity
Commit End
NextStatus
Message
End
End
RejectStat
End
BeginProc
Commits Inventory to the Work Order
Runs Capacity Plan Generation
Start
Start
Start
Start
WO1App1
WO1App2
End
Approve 1
Approve 2
Approve
WO1App1
WO1App2
End
ENd
End
WOActRules = Work Order Activity Rules Process
WOType = Work Order Type Process
WOType1 = Work Order Type 1 Process
WO1App1 = Work Order Type 1 Approve 1 Process
Con or OrgRule = Conditional or Organizational Rule
Act = Activity
N Act = Next Activity

Glossary

Glossary

actual demand. Actual customer orders and allocations of items/ingredients/raw materials to production or distribution.

aggregate leadtime. See cumulative leadtime.

aggregate planning. The sum of all forecasted demand (customer, distribution, manufacturing) for all items in a family for purposes of planning gross requirements.

alternate operation. Replacement for a normal operation or routing for an item in the manufacturing process.

alternate routing. A routing, less preferred than the primary routing, that results in an item identical to that produced by the primary routing.

application. A computer program or set of programs used to accomplish a task. In OneWorld, there are interactive applications and batch applications. Interactive applications are made up of a set of forms through which the user interacts with OneWorld. Interactive application identifiers begin with "P." For example, Address Book Revisions (P01012) is an interactive application. Batch applications run without user interaction. Reports and table conversions are examples of batch applications. Batch application identifiers begin with "R." For example, the Print Mailing Labels report (R01401) is a batch application.

assemble-to-order product. A product for which key components (bulk, semi-finished, intermediate, subassembly, fabricated, purchased, packaging, and so on) are planned and stocked in anticipation of a customer order. Contrast with make-to-order product.

assembly. A group of items or subassemblies that, when put together, constitute an end item.

assembly inclusion rule. A logic statement that specifies the conditions for using a part, adjusting the price or cost, performing a calculation, or using a routing operation for configured items.

associated service type. See linked service type.

audit trail. The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records and usually concludes with a report.

automatic accounting instruction (AAI). A code that refers to an account in the chart of accounts. AAIs define rules for programs that automatically generate journal entries, including interfaces between the Accounts Payable, Accounts Receivable, Financial Reporting, and General Accounting systems. Each system that interfaces with the General Accounting system has AAIs. For example, AAIs can direct the General Ledger Post program to post a debit to a specific expense account and a credit to a specific accounts payable account.

availability. For packaged product, the system checks availability. For bulk product, you can assume it is in stock and available for sale.

backflush. To deduct from inventory records the components or ingredients as a result of the production process. See also super backflush.

batch bill of material. A recipe or formula in which the quantity of each component is based on the standard batch quantity of the parent.

batch control. A feature that verifies the number of transactions and the total amount in each batch that you enter into the system.

batch input. A group of transactions loaded from an external source.

batch job. A task or group of tasks you submit for processing that the system treats as a single unit during processing, for example, printing reports and purging files. The system performs a batch job with little or no user interaction.

batch processing. A method by which the system selects jobs from the job queue, processes them, and sends output to the outqueue. Contrast with interactive processing.

batch quantity. See standard batch quantity.

batch type. A code assigned to a batch job that designates to which system the associated transactions pertain, thus controlling which records are selected for processing. For example, the Post General Journal program selects for posting only unposted transaction batches with a batch type of O.

bill of material (BOM). A listing of all the subassemblies and raw materials that make up a parent assembly. The BOM is used with the master

production schedule to determine the items for which purchase requisitions and production orders must be released. Display formats for bills of material include single level, multi-level, indented, planning, and costed.

broadcast message. 1) An e-mail message that you send to multiple recipients. 2) A message that appears on a form instead of in your mailbox.

bucketed system. A material requirements planning, distribution requirements planning, or other time-phased system in which all time-phased data is accumulated into time periods, or buckets. If the period of accumulation is one week, then the system is said to have weekly buckets.

bucketless system. A material requirements planning, distribution requirements planning, or other time-phased system in which all time-phased data is processed, stored, and displayed using dated records rather than defined time periods, or buckets.

bulk issue. Items issued from stores to work-in-process inventory, based on quantities estimated to cover requirements of individual work centers and production lines instead of individual job orders. A bulk issue can be used to cover a period of time or to fill a fixed-size container.

business unit. See facility.

by-product. A material of positive or negative value produced as a residual of or incidental to the production process. The ratio of by-product to primary product is usually predictable. By-products might be discarded, sold as is, or used for other purposes. See also co-product and restricted by-product.

capacity requirements planning (CRP). The function of establishing, measuring, and adjusting limits or levels of capacity by determining in detail how much labor and machine resources are required to accomplish the tasks of production. Open shop orders and planned orders in the Material Requirements Planning system are inputs to CRP, which “translates” these orders into hours of work by work center and by time period.

category code. A type of user defined code for which you can provide the title. For example, if you were adding a code that designated different sales regions, you could change category code 4 to Sales Region, and define E (East), W (West), N (North), and S (South) as the valid codes. Sometimes referred to as reporting codes. See also user defined code.

certificate of analysis (COA). A document that includes all of the tests performed and resulting test data for an item lot.

chart of accounts. The structure for general ledger accounts. The chart of accounts lists types of accounts, describes each account, and includes account numbers and posting edit codes.

committed material. Material on hand or on order that is assigned to specific future production or customer orders. Sometimes referred to as reserved material.

component. A raw material, ingredient, or subassembly that is used as an element of another assembly, process, or item. A component might be packaging material for a finished item.

component changeout. See component swap.

component swap. In Equipment/Plant Management, the substitution of an operable component for one that requires maintenance. Typically, you swap components to minimize equipment downtime while servicing one of the components.

composite leadtime. See cumulative leadtime.

configuration management. A rules-based method of ordering assemble-to-order or make-to-order products, in which characteristics of the product are defined as part of the Sales Order Entry process. Characteristics are edited using Boolean logic and then translated into the components and routing steps required to produce the product. The resulting configuration is also priced and costed, based on the characteristics defined.

configured item segment. A characteristic of a configured item defined during sales order entry. For example, a customer may specify a type of computer hard drive by stating the number of megabytes of the hard drive, rather than a part number.

constants. Parameters or codes that you set and that the system uses to standardize the processing of information by associated programs.

consuming location. The point on the production line where a component or subassembly is used in the production process. Consuming location is used in kanban processing.

corrective maintenance. Any maintenance work that falls outside the scope of preventive or predictive maintenance. Corrective maintenance can be planned, unplanned, or emergency, for example,

to respond to equipment failure. Contrast with preventive maintenance and predictive maintenance.

corrective work order. A work order that is used to formally request corrective maintenance, and to communicate all details pertaining to the corrective maintenance task.

cost component. An element of an item's cost, for example, material, labor, or overhead.

cost rollup. A simulated scenario in which work center rates, material costs, and labor costs are used to determine the total cost of an item.

costed bill of material. A bill of material that extends the quantity per of every component by the cost of the components. See also bill of material.

co-product. An end item produced as the result of a process. There are usually two or more co-products. See also end item and by-product.

crew size. The number of people required to perform an operation.

critical path leadtime. See cumulative leadtime.

cross segment edit. A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.

cumulative leadtime. The longest planned length of time needed to accomplish the activity in question. For any item planned through material requirements planning, cumulative leadtime is determined by reviewing the leadtime for each bill of material path below the item. The path with the longest leadtime defines the cumulative leadtime. Sometimes referred to as critical path leadtime, aggregate leadtime, or composite leadtime.

current cost. The cost associated with an item at the time a parts list and routing are attached to a work order or rate schedule. Current cost is based on the latest bill of material and routing for the item.

data dictionary. A database table that OneWorld uses to manage the definitions, structures, and guidelines for the usage of fields, messages, and help text. J.D. Edwards has an active data dictionary, which means that it is accessed at runtime.

database. A continuously updated collection of all information that a system uses and stores. Databases make it possible to create, store, index, and cross-reference information online.

date pattern. A period of time set for each period in standard and 52-period accounting.

default. A code, number, or parameter that the system supplies when the user does not specify one.

detail. The specific information that makes up a record or transaction. Contrast with summary.

detail area. An area of a form that displays detailed information associated with the records or data items displayed on the form. See also grid.

direct labor. Labor that is applied to the product being manufactured.

direct material. Measurable quantities of material that becomes a part of the final product.

dispatch list. A list of sequenced work orders or rate schedules that contain detailed information on location, quantity, and capacity requirements. Dispatch lists are usually generated daily and are oriented by work center or line.

effectivity date. The date on which a component or an operation is to be added or removed from a bill of material or an assembly process. Effectivity dates are used in the planning process to create demands for the correct items. Normally, bills of material and routings provide for an effectivity start date (from) and stop date (through), signifying the beginning and end of a particular relationship. Sometimes referred to as effective date.

electronic commerce. See Electronic Data Interchange.

Electronic Data Interchange (EDI). The paperless, computer-to-computer exchange of business transactions, such as purchase orders and invoices, in a standard format with standard content.

engineering change order (ECO). A work order used to implement and track a change in a manufactured product. This includes changes in design, quantity of items required, and assembly or production process.

enterprise resource planning (ERP). A closed-loop, integrated system that enables manufacturers and distributors to coordinate all of the activities necessary to fulfill customer demand. This includes activities associated with suppliers, customers, inventory, shop floor, product costing and accounting, forecasting, and planning and scheduling.

Enterprise Workflow Management. A OneWorld system that provides a way of automating tasks,

such as notifying a manager that a requisition is waiting for approval, using an e-mail-based process flow across a network.

expedite. To process production or purchase orders in less than the normal leadtime.

explosion. The process of calculating the demand for the components of a parent item by multiplying the parent item requirements by the quantity per specified in the bill of material. Sometimes referred to as requirements explosion. Contrast with implosion.

exponential smoothing. A forecasting technique in which past observations are geometrically discounted according to their age. The heaviest weight is assigned to the most recent data. The smoothing is termed exponential because data points are weighted in accordance with an exponential function of their age.

facility. An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit.

family. See master planning family.

feature. A characteristic of a product or service, such as an option, accessory, or attachment.

field. 1) An area on a form that represents a particular type of information, such as name, document type, or amount. 2) A defined area within a record that contains a specific piece of information. For example, a supplier record consists of the fields Supplier Name, Address, and Telephone Number.

file. A set of information stored under one name. See also table.

finished good. See end item.

firm planned order (FPO). A work order that has reached a user defined status. When this status is entered in the processing options for the various manufacturing programs, messages for those orders are not exploded to the components.

first in, first out (FIFO). A method of inventory valuation for accounting purposes, based on the assumption that oldest inventory (first in) is the first to be used (first out). There is no relationship with the actual physical movement of specific items.

fixed cost. An expense that does not vary with the production volume, for example, setup cost.

fixed order quantity. A lot-sizing technique in MRP or inventory management whereby the system generates planned or actual orders for a predetermined quantity. If the net requirements for a period exceed the fixed order quantity, the system generates orders for multiples of the fixed order quantity.

fixed overhead. Manufacturing costs that continue even if products are not produced. Although fixed overhead is necessary to produce the product, it cannot be directly traced to the final product.

fixed quantity. A value that indicates that the amount of a component or ingredient used in the manufacturing process of an end item remains the same, regardless of the quantity of the end item produced. Contrast with variable quantity.

forecast. An estimate of future demand, determined by mathematical means using historical data, subjective estimates from informal sources, or a combination of both.

forecast consumption. The reduction of forecast demand, based on actual sales orders received or shipped, up to the forecast quantity.

form. The element of the OneWorld graphical user interface by which the user exchanges data with interactive applications. Forms are made up of controls, such as fields, options, and the grid. These controls allow the user to retrieve information, add and revise information, and navigate through an application to accomplish a task.

frozen cost. The cost of an item, operation, or process, after the frozen update program is run, that is used by the Manufacturing Accounting system.

frozen update program. A program that freezes the current simulated costs, thereby finalizing them for use by the Manufacturing Accounting system.

Gantt chart. A control chart that shows graphically the relationship between planned performance and actual performance.

grade. A rating assigned to an item, based on how well the item meets required specifications.

grid. A control that displays detail information on a form. The grid is arranged into rows, which generally represent records of data, and columns, which generally represent fields of the record. See also detail area.

header. Information at the beginning of a table or form. Header information is used to identify or

provide control information for the group of records that follows.

indented bill of material. A multi-level bill of material that lists the highest level parent items at the left margin and all the components going into the patents indented to the right of the margin. All subsequent levels of components are indented farther to the right. If a component is used in more than one parent within a given product structure, it will appear under every subassembly in which it is used.

indented where-used. A bill of material listing for one component, every parent item and subassembly, and the respective quantities required. Each of these parent items calls for the given component item in a bill of material table. The component item is shown closest to the left margin of the listing in the bill, with each parent indented to the right, and each of their respective parents indented even further to the right.

ingredient. In process manufacturing industries, the raw material or component of a recipe or formula.

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

interactive processing. Processing actions that occur in response to commands that you enter directly into the system. During interactive processing, you are in direct communication with the system, and it might prompt you for additional information while processing your request. Contrast with batch processing.

intermediate. Material processed beyond raw material and used in higher level items. Intermediates are not stocked in inventory, sold to customers, or planned by material requirements planning.

in-process inventory. See work-in-process (WIP).

item master. A record for an item. The item master contains descriptive data and control values (leadtimes, lot sizes, and so on), and might contain data on inventory status, requirements, planned orders, and costs. Item master records are linked together by product structure records that define the bill of material for an item.

job queue. A group of jobs waiting to be batch processed. See also batch processing.

Just-in-Time (JIT). A method of manufacturing based on planned elimination of all waste and continuous improvement of productivity. The primary elements of Just-in-Time manufacturing are to have only the required inventory when needed; to improve quality to zero defects; to reduce leadtimes by reducing setup times, queue lengths, and lot sizes; to revise incrementally the operations themselves; and to keep costs to a minimum.

kanban. Information cards attached to a group or bin of items that travel in and out of a work center. Kanbans indicate to producing work centers what has been consumed and what needs to produced next. Some companies use various shapes, sizes, and colors of cards for ease of recognition and to indicate an item's priority. OneWorld uses electronic kanbans.

labor cost. The monetary amount of labor performed during manufacturing.

ledger type. A code that designates a ledger used by the system for a particular purpose. For example, all transactions are recorded in the AA (actual amounts) ledger type in their domestic currency. The same transactions may also be stored in the CA (foreign currency) ledger type.

level. The code used for every item or assembly in a product structure to signify the relative level in which that item or assembly is used within the product structure. Normally, the end items are assigned to level 0 with the components and subassemblies of the item assigned to level 1 and so forth. The material requirements planning explosion process starts from level 0 and proceeds downward, one level at a time.

linked service type. A service type that is associated with a primary service type. Linked service types are cancelled and the maintenance tasks are performed when the primary service type to which they are linked comes due. You can specify whether the system generates work orders for linked service types, as well as the status the system assigns to work orders that have already been generated. Sometimes referred to as associated service types. See also primary service type and service type.

lot. A quantity produced together that shares the same production components. Lots are uniquely identified to allow for traceability.

lot number control. Assignment of unique numbers to each instance of receipt. This number carries forth into subsequent manufacturing processes. Thus, in

review of an end item lot, each lot consumed can be identified as having been used for the manufacture of the specific end item lot.

maintenance loop. See maintenance route.

maintenance route. A method of performing PMs for multiple pieces of equipment from a single preventive maintenance work order. A maintenance route includes pieces of equipment that share one or more identical maintenance tasks that can be performed at the same time for each piece of equipment. Sometimes referred to as maintenance loop.

maintenance work order. In J.D. Edwards systems, a term used to distinguish work orders created for the performance of equipment and plant maintenance from other work orders, such as manufacturing work orders, utility work orders, and engineering change orders.

make-to-order product. A product that is produced after receipt of a customer's order. The final product is usually a combination of standard purchased items and items specially designed to meet the needs of the customer. Frequently, long leadtime components are planned prior to the order arriving to reduce the delivery time to the customer. Contrast with assemble-to-order product. See also make-to-stock product.

manufacturing and distribution planning. Planning that includes Resource and Capacity Planning and Material Planning Operations. Resource and Capacity Planning allows you to prepare a feasible production schedule that reflects your demand forecasts and production capability. Material Planning Operations provides a short-range plan to cover material requirements that are needed to make a product.

manufacturing calendar. See work day calendar.

master planning family. Products that are grouped together for material planning purposes, based on shared characteristics.

Master Production Scheduling (MPS). The act of creating a master schedule. See also master schedule.

master schedule. A detailed statement of how many items are planned to be produced and when. The master schedule focuses on products to be made and, through the detailed planning system, identifies the resources (materials, work force, plant equipment, and capital) needed and the timing of the need. See also material requirements planning.

master table. A database table used to store data and information that is permanent and necessary to the system's operation. Master tables might contain data, such as paid tax amounts, supplier names, addresses, employee information, and job information.

material requirements planning (MRP). A set of techniques that uses bill of material, inventory data, and the master schedule to calculate the time-phased net material requirements for every component item and subassembly. MRP suggests a replenishment plan to support the production of the quantities that are specified in the master schedule. See also master schedule.

menu masking. A security feature that lets you prevent individual users from accessing specified menus or menu selections.

model work order. In Equipment/Plant Management, a work order that functions as a template for the creation of other work orders. You can assign model work orders to service types. When the service type comes due, the system automatically generates a work order based on information from the model work order.

net added cost. The cost to manufacture an item at the current level in the bill of material. Thus, for manufactured parts, the net added cost includes labor, outside operations, and cost extras applicable to this level in the bill of material, but not materials (lower-level items). For purchased parts, the net added cost also includes the cost of materials.

next numbers. A feature used to control the automatic numbering of items such as new G/L accounts, vouchers, and addresses. Next numbers provides a method of incrementing numbers.

nonconforming product. Items that do not meet the requirements of a relevant specification, contract, regulation, or quality test.

nonsignificant item numbers. Item numbers that are assigned to each item but do not convey any information about the item. They are identifiers, not descriptors. Contrast with significant item numbers.

operation sequence. The sequential steps that an item follows in its flow through the plant. For instance, operation 10: cut bar stock; operation 20: grind bar stock; operation 30: shape; operation 40:

polish; operation 50: inspect and send to stock. This information is maintained in the routing table.

operation yield. The planned percent of output at an operation. For example, if the operation yield is 90% and 100 units are started at that operation, planned output is 90 units that will be available to the next operation.

output queue. See print queue.

overlap. The percentage by which an operation overlaps the previous operation in the sequence. For example, a 20% overlap means that a step can begin when the previous step is 80% complete.

parameter. A number, code, or character string you specify in association with a command or program. The computer uses parameters as additional input or to control the actions of the command or program.

parent item. See end item.

parent/child relationship. See parent/component relationship.

parent/component relationship. 1) In Equipment/Plant Management, the hierarchical relationship of a parent piece of equipment to its components. For example, a manufacturing line could be a parent and the machinery on the line could be components of the line. In addition, each piece of machinery could be a parent of still more components. 2) In Product Data Management, a hierarchical relationship of the components and subassemblies of a parent item to that parent item. For example, an automobile is a parent item and its components and subassemblies include: engine, frame, seats, and windows. Sometimes referred to as parent/child relationship.

pay on consumption. The method of incurring a liability for items received from a supplier only when the material is used in the production process.

phantom bill of material. A bill of material used primarily for non-stocked items that represents an item that is physically built, but rarely stocked. The item is instead used in the next step or level of manufacturing. Material requirements planning uses the phantom bill of material to explode the requirements through the phantom item to its components. See also explosion.

planning bill of material. An artificial grouping of items or events in bill of material format, used to facilitate master scheduling of material planning, and forecasting. Sometimes referred to as pseudo bill of material.

planning calendar. See work day calendar.

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

PM. Maintenance tasks and procedures that are routine and repetitive, such as periodic lubrications and filter replacements. Preventive maintenance procedures are designed to eliminate breakdowns and the need for corrective maintenance. Contrast with corrective maintenance and predictive maintenance.

potency. Identifies the percent of a process item in solution. For example, 80% solution could be used in a process that called for 100%, but would require 25% more in terms of quantity to meet the requirement (100 / 80 = 1.25).

predictive maintenance. A maintenance strategy that uses computerized data collection and analysis of equipment operating parameters to predict the point at which equipment is expected to fail and then schedules the appropriate procedures just before the expected equipment failure. Predictive maintenance can significantly reduce costs and equipment downtime by eliminating unnecessary preventive maintenance procedures. In addition, by predicting and averting catastrophic equipment failure, predictive maintenance reduces overall maintenance costs and allows for equipment to be operated for its full service life. Contrast with corrective maintenance and preventive maintenance.

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

preflush. To deduct materials from inventory when the parts list and routing are attached.

preventive maintenance (PM). One or more service types that are due to be performed for a piece of equipment, based on the service intervals for each service type. When you complete a preventive maintenance, a new preventive maintenance cycle begins for the service types included in the preventive maintenance.

preventive maintenance cycle. The sequence of events that make up a preventive maintenance task, from its definition to its completion. Because most

preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.

preventive maintenance schedule. The combination of service types that apply to a specific piece of equipment, as well as the intervals at which each service type is scheduled to be performed.

primary location. The designation of a certain storage location as the standard, preferred location for an item.

primary service type. A service type to which you can link related service types. For example, for a particular piece of equipment, you might set up a primary service type for a 1000-hour inspection and a linked service type for a 500-hour inspection. The 1000-hour inspection includes all tasks performed at 500 hours. When a primary service type is scheduled to be performed, the system schedules the linked service type. See also linked service type.

print queue. A list of tables, such as reports, that you have submitted to be written to an output device, such as a printer. The computer spools the tables until it writes them. After the computer writes the table, the system removes the table identifier from the print queue.

priority. 1) The relative importance of jobs in a queue. 2) The sequence in which jobs should be completed.

processing option. A feature that allows you to direct the functions of a program. For example, processing options allow you to specify defaults for certain forms, control the format in which information prints on reports, and change how information appears on a form or in a report.

Product Data Management (PDM). In J.D. Edwards software, the system that enables a business to organize and maintain information about each item it manufactures. Features of this system, such as bills of material, work centers, and routings, define the relationships among components and how they can be combined to manufacture an item. PDM also provides data for other manufacturing systems including Manufacturing Accounting, Shop Floor Management, and Manufacturing and Distribution Planning.

product family. See master planning family.

product line. A group of products whose similarity in manufacturing procedures, marketing characteristics, or specifications allow them to be aggregated for planning, marketing, and occasionally, costing. See also master planning family.

production line. A series of work centers or machines allocated to the production of a limited number of items with similar routings.

projected cost. The target expenditure in added value for material, labor, and so forth during manufacture. See also standard cost.

pseudo bill of material. See planning bill of material.

purchased part. An item bought from a supplier.

purge. The process of removing records or data from a system table.

queue. The jobs waiting to be processed at a given work center. As queues increase, so do average queue time and work-in-process inventory.

recipe. See bill of material.

record. A collection of related, consecutive fields of data that the system treats as a single unit of information.

repetitive manufacturing. Producing items in high-volume concentration, often with entire production lines dedicated to a family of products.

replacement parts. Parts that can be used as substitutes. They differ from completely interchangeable service parts in that they require some physical modification, such as cutting, drilling, and so forth, before they can replace the original part.

replenishment point. The location on or near the production line where additional components or subassemblies are to be delivered.

requirements explosion. See explosion.

reserved material. See committed material.

resource requirements planning (RRP). The process of converting the production plan into capacity needs for key resources, such as workforce, machinery, warehouse space, suppliers' capabilities, and in some cases, money. Comparison of capacity required of items in the master schedule to available capacity is usually done for each key resource.

restricted by-product. A restricted secondary or incidental product produced while making another product. Such by-products cannot be sold because

they are restricted from sale by government policies. The company might have to forego making a product if a restricted by-product is produced.

revision level. A number or letter representing the number of times a document or item has been changed.

rollup. See cost rollup.

rough cut capacity planning (RCCP). The process of converting the master schedule into capacity needs for key resources, such as workforce, machinery, warehouse space, suppliers' capabilities, and in some cases, money. Comparison of capacity required of items in the master schedule to available capacity is usually done for each key resource.

run size. See standard batch quantity.

safety stock. 1) A quantity of stock planned to be on hand to protect against fluctuations in demand or supply. 2) In Master Production Scheduling, the additional inventory or capacity planned as protection against forecast errors or short-term changes in the backlog. Overplanning can be used to create safety stock.

scheduling workbench. A multiple-function program that allows the sequencing of work orders, rate schedules, or both on a production line. Sequencing can be manual or automatic, based on user defined category code definition. Sequencing includes forward, finite scheduling, including the option to cross shifts or days.

scrap. Unusable material that results from the production process. Scrap is material outside of specifications and of such characteristics that rework is impractical.

scrap rate. See scrap factor.

sequencing. Determining the order in which a facility processes different jobs.

serial number. A unique number assigned to identify a specific item with a lot size of one.

service interval. The frequency at which a service type is to be performed. Service intervals can be based on dates, periods, or statistical units that are user defined. Examples of statistical units are hours, miles, and fuel consumption.

service type. An individual preventive maintenance task or procedure, such as an inspection, lubrication, or overhaul. Service types can apply to a specific piece of equipment or to a class of equipment. You can specify that service types come due based on a predetermined service interval, or whenever the task represented by the service type becomes necessary.

setup cost. The labor costs associated with setting up an operation for the next product.

shop calendar. See work day calendar.

Shop Floor Management. A system that uses data from Product Data Management, Master Production Scheduling, and Material Requirements Planning to create, maintain, and communicate status on shop orders (work orders).

shrink factor. A percentage factor in the item master record that compensates for expected loss during the manufacturing cycle either by increasing the gross requirements or by reducing the expected completion quantity of planned and open orders. The shrink factor differs from the scrap factor in that the former affects all uses of the part and its components and the scrap factor relates to a single component. Sometimes referred to as shrinkage rate.

shrinkage rate. See shrink factor.

significant item numbers. Item numbers that are intended to convey certain information, such as the source of the part, the material in the part, the shape of the part, and so forth. Contrast with nonsignificant item numbers.

simulated cost. After a cost rollup, the cost of an item, operation, or process according to the current cost scenario. This cost can be finalized by running the frozen update program. You can create simulated costs for a number of cost methods, for example, standard, future, and simulated current costs. See also cost rollup.

single level where-used list. A type of bill of material that lists each parent in which a specific component is directly used and in what quantity it is used.

specification. A statement of the technical requirements of an application or item and the process involved to ensure the requirements are met.

spool. The function by which the system stores generated output to await processing.

standard cost. The expected, or target cost of an item, operation, or process. Standard costs represent only one cost method in the Product Costing system. You can also calculate, for example, future costs or current costs. However, the Manufacturing Accounting system uses only standard frozen costs.

standard costing. A costing method that uses cost units determined before production. For management control purposes, the system compares standard costs to actual costs and computes variances.

standard hours. The length of time that should be required to 1) set up a given machine or operation and 2) run one part, assembly, batch, or end product through that operation. This time is used in determining machine and labor requirements. It is also frequently used as a basis for incentive pay systems and as a basis for allocating overhead in cost accounting systems.

subassembly. An assembly that is used at a higher level to make up another assembly.

substitution. To use alternate components in production when primary items are not available.

summary. The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many systems offer forms and reports that summarize information stored in certain tables. Contrast with detail.

super backflush. To create backflush transactions against a work order at pay points defined in the routing. By doing so, you can relieve inventory at strategic points throughout the manufacturing process. See also backflush.

supplier scheduling. A process of providing suppliers with consistent shipping information and advanced demand profiles to support just-in-time production and delivery. The supplier scheduling system includes a business agreement and delivery schedule for each supplier. Supplier scheduling includes a formal priority planning system and EDI functionality to provide the supplier with valid due dates.

supply chain. The link from the initial raw materials to the consumption of the finished product.

supplying location. The location from which inventory is transferred once quantities of the item on the production line have been depleted. Used in kanban processing.

system. A group of related applications identified by a name and a system code. For example, the Address Book system code is 01. All applications, tables, and menus within a system can be identified by the system code.

system code. A code that identifies a system, for example, 01 for the Address Book system and 31 for the Shop Floor Management system.

table. In database environments, a two-dimensional entity made up of rows and columns. All physical data in a database are stored in tables. See also file.

threshold percentage. In Equipment/Plant Management, the percentage of a service interval that you define as the trigger for maintenance to be scheduled. For example, you might set up a service type to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.

traceability. The ability to trace the production history of a product for quality or warranty purposes. This is usually done through the use of lot or serial numbers to link raw materials from the supplier to the end product. Lot/serial number traceability can be a government requirement in certain regulated industries, such as the pharmaceutical or automotive industries. See also lot.

unit cost.The total cost of labor, material, and overhead for one unit of production.

unit of measure. The standard quantity by which an item is managed, such as by weight, box, package, case, each, and so forth.

user defined code (UDC). A code that users can define, assign code descriptions, and assign valid values. Examples of such codes are unit-of-measure codes, state names, and employee type codes.

user defined code type. The identifier for a table of codes with a meaning that you define for the system, such as ST for the Search Type codes table in Address Book. OneWorld provides a number of these tables and allows you to create and define tables of your own.

value added. Amount of increased worth of inventory through manufacturing, processing, or packaging.

variable quantity. A value that indicates the amount of a component or ingredient that varies based on the quantity of the end product produced. Contrast with fixed quantity.

variance. 1) In Product Costing and Manufacturing Accounting, the difference between two methods of costing the same item. For example, the difference between the frozen standard cost and the current

cost is an engineering variance. Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates. 2) In Equipment/Plant Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

vocabulary overrides. A feature that you can use to override field, row, or column title text on forms and reports.

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

work order life cycle. In Equipment/Plant Management, the sequence of events through which a work order must pass to accurately communicate the progress of the maintenance tasks it represents.

work-in-process (WIP). One or more products in various stages of completion throughout the plant, including all material from raw material that has been released for initial processing up to completely processed material awaiting final inspection and acceptance as finished product. Sometimes referred to as in-process inventory.

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