PeopleSoft®

EnterpriseOne 8.10 Resource Assignments PeopleBook

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EnterpriseOne 8.10
Resource Assignments PeopleBook
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About These EnterpriseOne PeopleBooks Preface

EnterpriseOne PeopleBooks provide you with the information that you need to implement and use PeopleSoft EnterpriseOne applications.

This preface discusses:

- EnterpriseOne application prerequisites
- Obtaining documentation updates
- Typographical elements and visual cues
- Comments and suggestions

Note

EnterpriseOne PeopleBooks document only fields that require additional explanation. If a field is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use EnterpriseOne applications.

See the *Foundation Guide*.

You might also want to complete at least one EnterpriseOne introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using EnterpriseOne menus and forms. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your EnterpriseOne applications most effectively.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You can find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Note

Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, *http://www.peoplesoft.com/corp/en/login.jsp*

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions
- Visual cues

Typographical Conventions

The following table contains the typographical conventions that are used in EnterpriseOne PeopleBooks:

Typographical Convention or Visual Cue	Description
Italics	Indicates emphasis, topic titles, and titles of PeopleSoft or other book-length publications. Also used in code to indicate variable values.
Key+Key	A plus sign (+) between keys means that you must hold down the first key while you press the second key. For example, Alt+W means hold down the Alt key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicates an adjective that is used in a way that might not be readily understood without the quotation marks, for example "as of" date, “as if’ currency, "from" date, and "thru" date.
Cross-references	EnterpriseOne PeopleBooks provide cross-references either below the heading “See Also” or preceded by the word See. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

EnterpriseOne PeopleBooks contain the following visual cues:

- Notes
- Cautions

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note

Example of a note.

Cautions

Text that is preceded by *Caution* is crucial and includes information that concerns what you must do for the system to function properly.

Caution

Example of a caution.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager, PeopleSoft Inc., 4460 Hacienda Drive, Pleasanton CA 94588

Or you can send e-mail comments to *doc@peoplesoft.com*.

While we cannot guarantee an answer to every e-mail message, we will pay careful attention to your comments and suggestions.

Resource Assignments Overview

The Resource Assignments applications provide the capability to assign resources to a work order or to specific work order instructions while checking the current availability and assignments of the resources.

Once work orders and instructions have been entered into the system, you can assign resources to either the work order or the instruction that is based on the work order document type. Resources can be either individuals who are validated against the address book or equipment that is validated against the equipment master.

Assigning resources to work orders involves matching the work order requirements against the resources; checking the availability, competencies, or skills of the resources; and creating resource assignments that can be monitored and against which reports can be run.

When you use work order resource assignments, you define the available capacity of resources by setting up a base calendar with available working hours. You also can set up a resource calendar for a specific resource to override the base calendar—for instance, if an employee takes a vacation. Once the base calendar is defined, you can associate resources with the base calendar in the Resource Master application (P48310) to define their availability. At any time, you can review the resource assignment information to determine whether resources are loaded according to their capacity.

If you want to be able to check the HR competencies or skills of your resources, you need to have the following system installed:

- 05B – HR/Payroll

User Defined Codes for Work Order Resource Assignments

The following user defined codes are used by the applications in the work order resource assignments module:

42/WD	Resource Calendar (Work Day Calendar Type). A user defined code that specifies how the calendar is used. For example, the calendar might be specific to an industry such as banking, or it might be used within Resource Assignments.
48/TP	Assignment Type. A user defined code that specifies the type of assignment in scheduling, notification, and assignment. For future use.
48/LP	Load Profile Method. A user defined code that indicates the load profile method for resources. The load profile method indicates how the work of an assignment is distributed. Currently only a float load profile is supported.
48/PT	Period Type. A user defined code that indicates the type of period used for displaying the availability and assignments of the resources You can set a default value in the processing options for the Resource Assignment program (P48331).

48/CT	Calendar Type. A user defined code that indicates the selected calendar type (for example, base calendar) when you define working hours in the Resource Working Hours application (P48307). You access valid values by clicking the Search button for the Type field.
48/RD	Resource Details. A user defined code that indicates whether the resources' assignments or availability appears on the Work with Resource Assignments form in the Resource Assignment program (P48331). You can set a default value in the processing options for the Resource Assignment program.
48/01-48/20	Resource Attributes. User defined codes that define additional filter criteria for resources. For example, if the HR/Payroll system is not installed, these codes can be used to define criteria such as job type or competency.
48/SD	Scheduling Day of Week. A user defined code that specifies the days for which working hours are defined. This code is used in the Resource Working Hours program.
48/WD	Work Day. A user defined code that indicates which day of the week is the starting workday. You can set a default value in the processing options for the Resource Assignments program.
48/TK	Task Status. A user defined code that specifies the status of a task in scheduling, notification, and assignment. For future use.
48/CK	Calendar Key. A user defined code that classifies different resource calendars. For example, you might define normal shift, day shift, and night shift calendars.
48/RL	Resource Assignment Level. A user defined code that specifies whether resource assignments are at the level of the work order or the work order labor detail, based on the work order document type. To make assignments at the labor detail level, you must use this UDC to specify the work order document type.

Setting Up Resource Assignment Constants

Before you use the programs that are required for assigning resources to work orders, you must use the Resource Assignment Constants program (P48301) to provide default values for the work day calendar and hours that can be set up for your resources.

The work day calendar default values are used when the resource master record is created. The business unit from the address book or the equipment master is used to determine which default values are used.

The working hours default values are used when the working hours are created in the Resource Working Hours program (P48307). The business unit ALL is used for the base calendars, and the business unit from the address book or the equipment master record of the resource is used for the resource calendars.

You must define business unit ALL to provide global default values. You can then define default values for a specific business unit. For any resources that are associated with this business unit, the values for calendar type, calendar value, branch, and shift that you have defined for this business unit are default values within the Resource Master program (P48310).

► To set up resource assignment constants

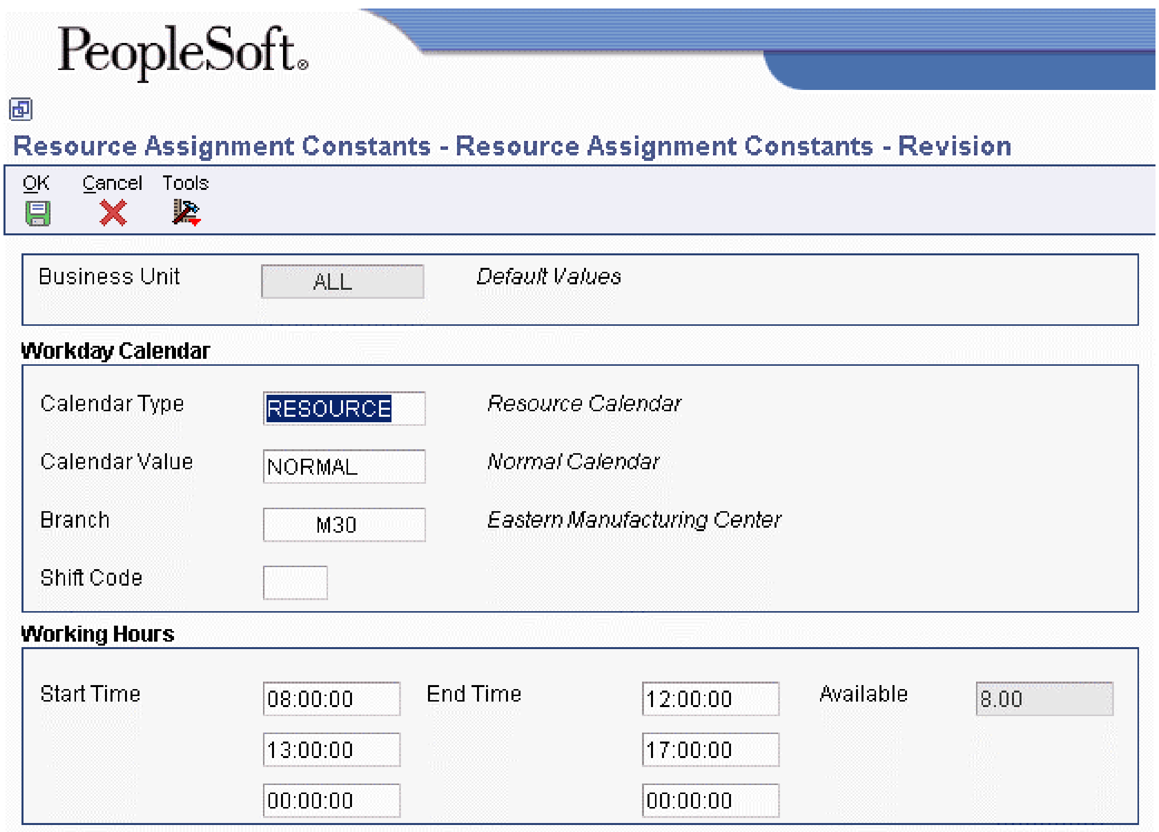
From the Resource Assignment Setup menu (G13RA41), choose Resource Assignment Constants.

1. On Work with Resource Assignment Constants, click Add.
2. On Resource Assignment Constants - Revision, complete the following fields:

   - Business Unit
   - Calendar Type
   - Calendar Value
   - Branch
   - Start Time
   - End Time

   The following field displays a calculated value as a result of the values that are entered into the Start Time and End Time fields:

   - Available



3. Click OK.

Defining Resource Working Hours

After you have defined default working hours in the Resource Assignment Constants application (P48301), you need to use the Resource Working Hours application (P48307) to set up working hour calendars. You can set up two types of working hour calendars:

- Base calendar

  The base calendar allows you to set up the working hours for a typical work week for a group of resources that is associated with the same work day calendar in the Resource Master application (P48310). The working hours from the business unit ALL that are set up in the Resource Assignment Constants application (P48301) are used as default values. You can edit these default values as necessary. For days on which no work is done—for example, Saturday and Sunday—you can override the normal working hours by entering 0 in the Start Time and End Time fields. In addition, you can specify that certain days, such as holidays, be considered nonworking days.

- Resource calendar

  The resource calendar allows you to override the capacity for a particular resource for a particular date or date range. The resource calendar is used for exceptions to the base calendar—for example, vacation time for a specific resource.

The calendar values that are defined in this application are stored in the Resource Working Hours table (F48307).

Prerequisites

- ❑ Verify that the resource assignment constants have been set up for business unit ALL and other business units, if required.
- ❑ Verify that the resource exists in the Resource Master application (P48310) before entering a resource calendar override.

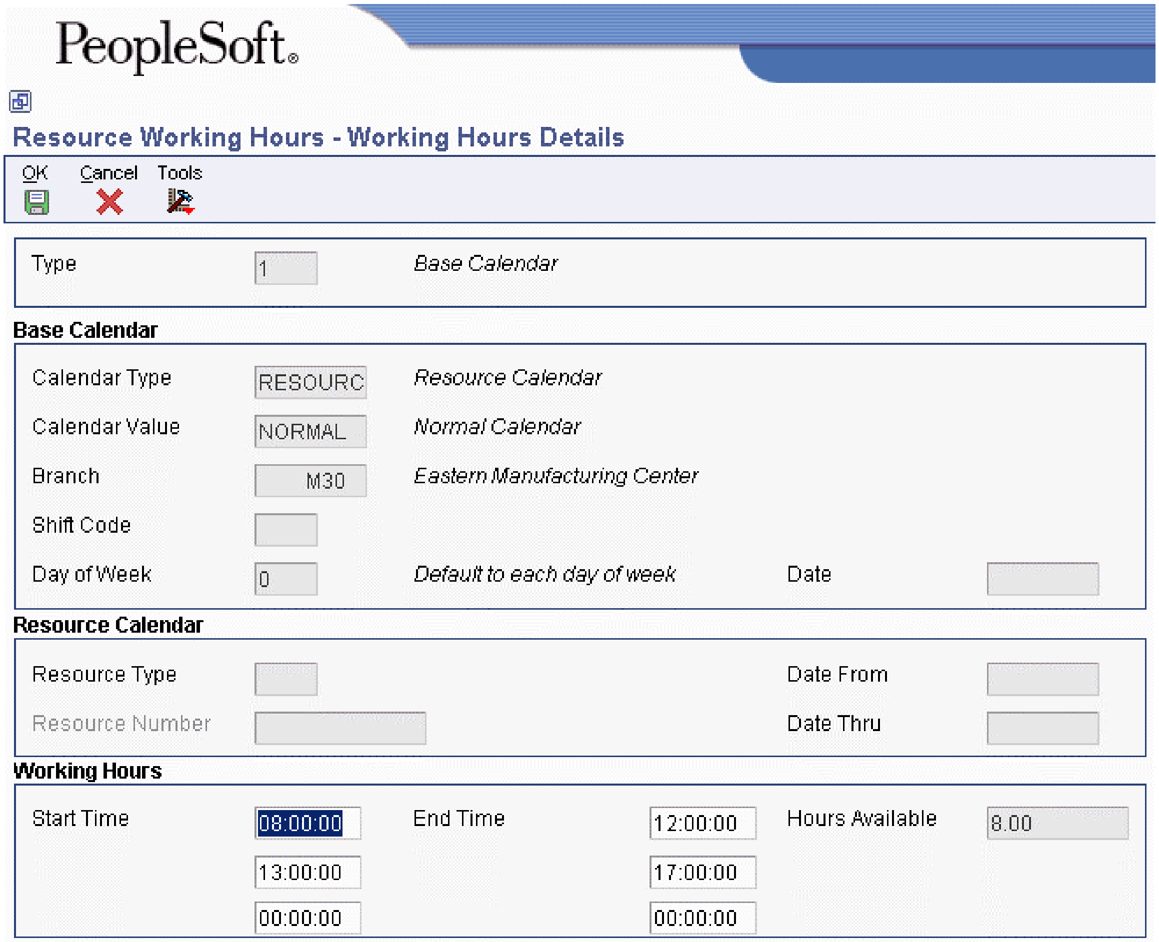
► To define a base calendar

From the Periodic Resource Assignment Processing menu (G13RA20), choose Resource Working Hours.

1. On Work With Resource Working Hours, complete any of the following fields on the Base Calendar tab and click Find:
   - Calendar Type
   - Calendar Value
   - Branch
   - Shift Code

   Any values that have been defined for the base calendar appear.

2. To add a new calendar value, click Add.
3. To revise an existing calendar value, select a record in the detail area and click Select.



4. On Working Hours Details, if you are adding a new calendar value, complete the following fields:

    - Calendar Type
    - Calendar Value
    - Branch
    - Shift Code
    - Day of Week

    If you want to define an override value for a specific date, type 9 in the Day of Week field. Doing so enables the Date field.

5. Enter the override date in the following field (if applicable):

    - Date

6. Complete the following fields:

    - Start Time
    - End Time

    The default values for these fields come from the business unit “ALL”. You can override the values.

7. To revise existing calendar values, complete the following fields:
   - Start Time
   - End Time

   The calculated result for the start and end times that you entered appears in the Hours Available field.

8. Click OK.

► To define a resource calendar

From the Periodic Resource Assignment Processing menu (G13RA20), choose Resource Working Hours.

1. On Work With Resource Working Hours, click the Resource Calendar tab and complete any of the following fields:
   - Resource Type
   - Resource Number
2. Click Find.

   Any values that have been defined for the resource calendar appear.

3. To add a new calendar value, click Add.
4. To revise an existing calendar value, select a record in the detail and click Select.
5. On Working Hours Details, if you are adding a new calendar value, complete the following fields:
   - Resource Type
   - Resource Number
   - Date From
   - Date Thru
   - Start Time
   - End Time

   Note

   If you enter a date range, the system adds a new record for each day in the date range.

6. To revise existing calendar values, complete the following fields:
   - Start Time
   - End Time

   The calculated result for the start and end times that you entered appears in the Hours Available field.

7. Click OK.

Working with the Resource Master

You use the Resource Master application (P48310) to maintain resource master information and attributes for individual and equipment resources. You can review resource information by resource type and resource number. You also can retrieve all resources, both active or inactive. Depending on whether the resource type is an individual or equipment, the information is retrieved from the Address Book Master table (F0101) or the Asset Master File table (F1201).

You use this program to add resources to the Resource Master table (F48310). By adding resources to the Resource Master, they become available for work order assignments. On the Basic Data tab of Resource Assignments, you can select the resource type that you want to add, and the address book number or asset number of a specific resource. You can define an effective date range for the resource and associate the resource with a Manager, Supervisor, Site, and Workcenter Branch. The values for Calendar Type, Calendar Value, Branch, and Shift Code (if applicable) are default values from the Resource Assignment Constants. They are based on the resource setup in the address book or asset master. If no Resource Assignment Constants are set up for the business unit, then the system uses the default values for business unit ALL. You can select the time zone manually, or the value can be provided from the processing options.

You can declare a resource inactive. If a resource is inactive and you use Advanced Search on Resource Assignments to search for active resources in the Resource Master Search & Select application (P48310S), this resource is not displayed as available for assignments.

In addition, the Resource Master application makes 20 Resource Attribute category codes available for the further classification of resources in the context of assignment requirements.

Prerequisites

- ❑ Verify that resource assignment constants have been set up.
- ❑ Set up desired default values in the processing options.

► To review existing resources

From the Periodic Resource Assignment Processing menu (G13RA20), choose Resource Master.

Note

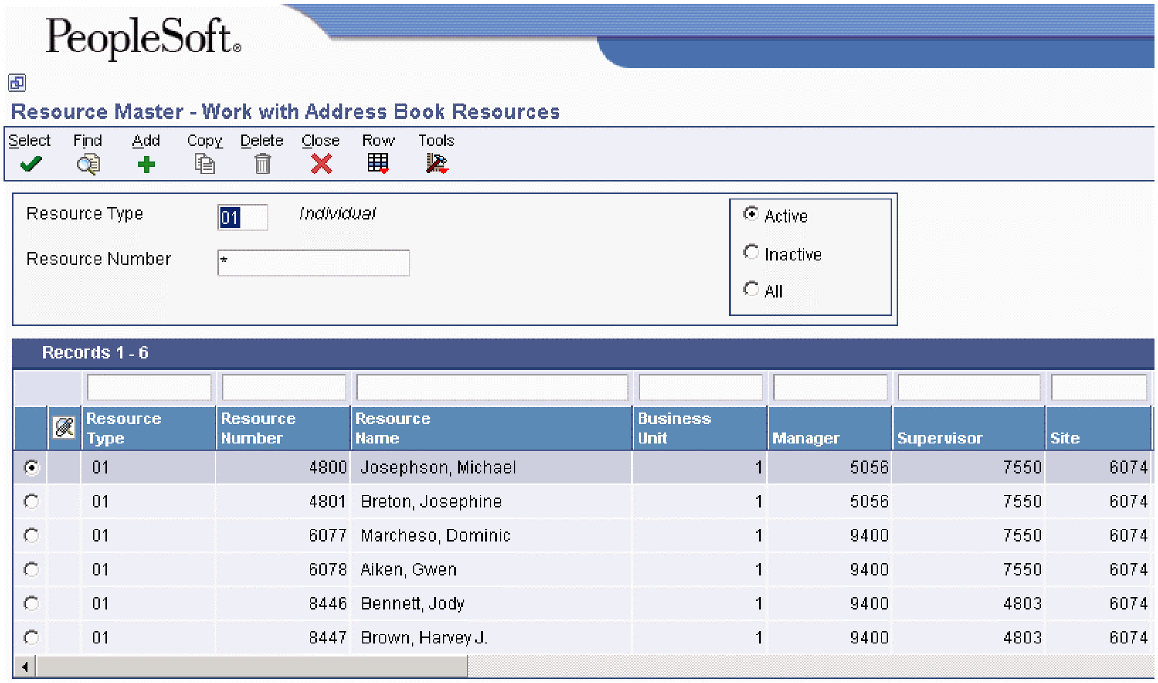
The resource type value controls the name of the form that appears when you choose Resource Master from the menu. For type 1 (individual), Work with Address Book Resources appears. For type 2 (asset), Work with Equipment Resources appears.

1. On Work with Address Book Resources or Work with Equipment Resources, complete the following field:
   - Resource Type

   You can override the default value set in the processing options.

2. Click Find.

   All of the resources for this resource type that were set up in the Resource Master table (F48310) appear in the detail area.



► To add resources

From the Periodic Resource Assignment Processing menu (G13RA20), choose Resource Master.

Note

The resource type value controls the name of the form that appears when you choose Resource Master from the menu. For type 1 (individual), Work with Address Book Resources appears. For type 2 (asset), Work with Equipment Resources appears.

1. On Work with Address Book Resources or Work with Equipment Resources, click Add.
2. On Resource Master Revisions, complete the following fields on the Basic Data tab:
   - Resource Type
   - Resource Number

     If the individual resource type is chosen, you enter an address book number for the resource number. If the asset resource type is chosen, you enter an equipment number for the resource number.

   - Effective Date
   - Expired Date
   - Manager
   - Supervisor
   - Site
   - Workcenter Branch
   - Assignment Percentage

3. If you need to deactivate a resource, click the following option:
   - Inactive
4. Click on the Calendar tab and complete the following field:
   - Time Zone

Notes

You can specify a default time zone in the processing options.

When you click the Calendar tab, the system provides values for the following fields, based on the resource assignment constants:

- Calendar Type
- Calendar Value
- Branch
- Shift Code

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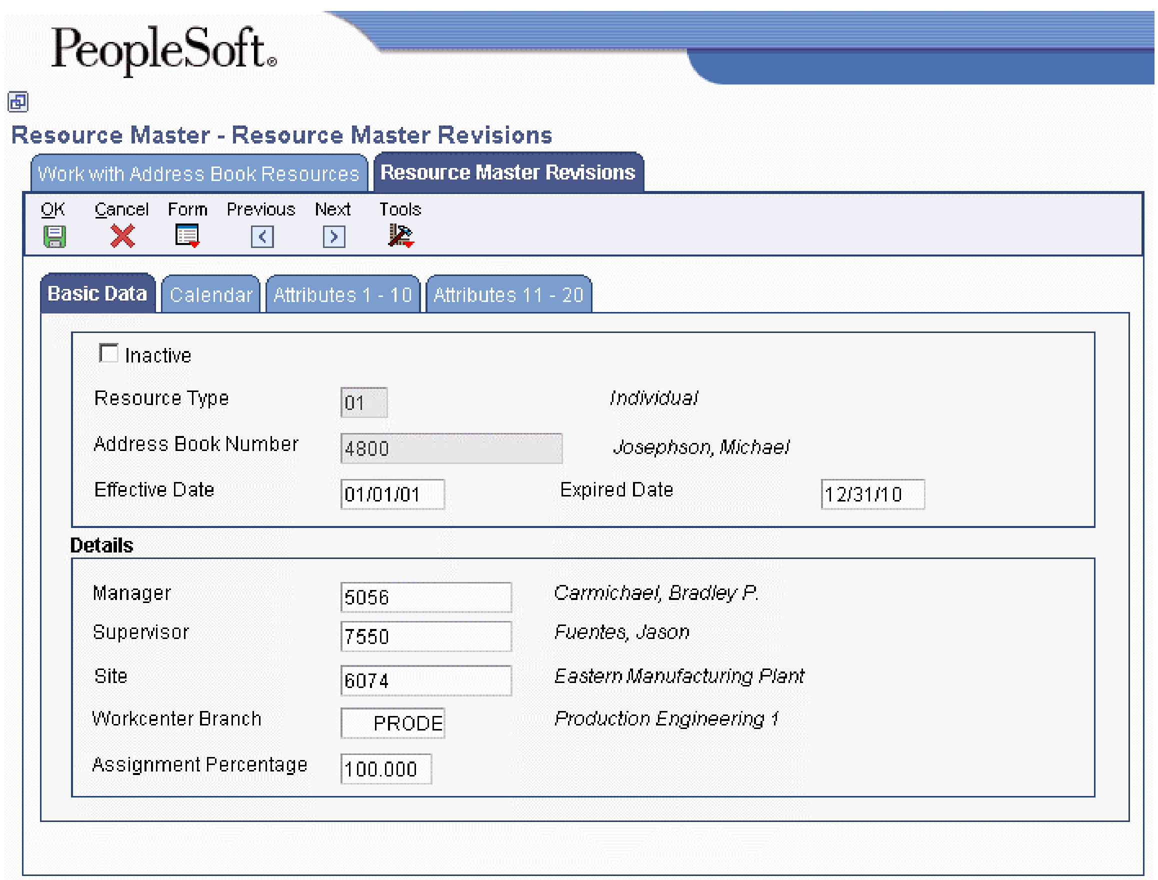
5. Complete the following optional field:
   - Rule Name
6. If you need to classify the resource further, complete the fields on the Attributes tabs.
7. Click OK.



Processing Options for Resource Master (P48310)

Defaults Tab

These processing options control the default values the system uses when you add resources to the Resource Master table (F48310).

1. Resource Type

Blank = 01

Use this processing option to specify the default resource type. The system uses this information to determine what type of resources to display. Enter a value from UDC 05/RT (Record Type). If you leave this processing option blank, a resource type of 01 is used. Valid values are:

01

Individual

02

Asset, such as equipment

2. Resource Activity

Blank = All
0 = Active
1 = Inactive

Use this processing option to specify if you wish to see resources that are active, inactive, or both. Valid values are:

Blank

Use all resources.

0

Use active resources.

1

Use inactive resources.

3. Effective Date

Use this processing option to default the effective date when adding resources in the Resource Master program (P48310). The system uses the effective date with the expiration date to determine when a resource is active.

4. Expiration Date

Use this processing option to default the expiration date when adding resources in the Resource Master program (P48310). The system uses the expiration date with the effective date to determine when a resource is active.

5. Time Zone

Use this processing option to default the time zone when adding resources in the Resource Master program(P48310). Use of the time zone when displaying date and time for resources is scheduled for a future release.

6. Daylight Saving

Use this processing option to default the daylight savings rule when adding resources in the Resource Master program (P48310). Use of the daylight savings rule when displaying date and time for resources is scheduled for a future release.

Versions Tab

This processing option controls the version that the system uses when this program is called.

1. Resource Competencies (P05100) Version

Blank = ZJDE0001

Use this processing option to specify the version that the system uses when accessing the Resource Competency Information program (P05100). If you leave this processing option blank, the system uses version ZJDE0001.

Updating the Resource Master Table

From the Advanced & Technical Operations menu (G13RA31), choose one of the following:

- Resource Master Global Update – Address Book
- Resource Master Global Update – Equipment Master

These programs enable you to add or update records in batch to the Resource Master table (F48310), which is based on either the Address Book Master table (F0101) or the Asset Master File table (F1201). You use data selection to control the records that are processed. The data selection for the Resource Master Global Update – Address Book program (R48350) is based on the Address Book Master table. The data selection for the Resource Master Global Update – Equipment Master program (R48351) is based on the Asset Master File table.

You use processing options to determine the values that the system uses when creating or updating the Resource Master Table. You can use the processing options to set default values for the Resource Master records. For example, you can indicate the following:

- Source of the calendar values
- Applicable address book numbers
- Default branch/plant
- Default assignment percentage value

Processing Options for Resource Master Global Update – Address Book/Equipment Master (R48350/R48351)

Process Tab

This processing option controls whether the batch program runs in proof or final mode.

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1. Proof or Final Mode

Blank = Proof Mode
1 = Final Mode

Use this processing option to specify whether the system prints in proof mode or final mode. If you choose final mode, the system updates tables as details are processed. If you choose proof mode, tables are not updated. Valid values are:

Blank

Use proof mode.

1

Use final mode.

Defaults Tab

These processing options control the default values the system uses to update the Resource Master table.

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1. Date - Effective

Use this processing option to specify the date that the system uses to update the effective from date (DEF) in the Resource Master table (F48310). If you leave this processing option blank, the system uses the system date when you add a new record. The system does not update the effective from date for existing records.

2. Date - Expired

Use this processing option to specify the date that the system uses to update the effective thru date (EXPR) in the Resource Master table (F48310). If you leave this processing option blank, the system uses the date from the century change year (CENTCHG) when you add a new record. The system does not update the effective thru date for existing records.

3. Default Calendar Values

Blank = Processing Options
1 = Resource Constants (F48301)

Use this processing option to specify whether the system uses the default calendar values specified in the processing options or set up in the Resource Assignments Constants table (F48301). Valid values are:

Blank

Use the calendar values specified in the processing options.

1

Use the calendar values set up in the F48301 table.

4. Business Unit to Retrieve Resource Constants

Blank = Address Book Cost Center

Use this processing option to specify the business unit that the system uses to locate the default calendar values in the Resource Assignments Constants table (F48301). If you leave this processing option blank, the system uses the business unit from the Address Book Master table (F0101).

5. Branch

Use this processing option to specify the default branch that is used when creating a resource master record. The system only uses this value if the Default Calendar Values processing option is set to default calendar values from the processing options.

6. Work Day Calendar Type

Use this processing option to specify the default work day calendar type that is used when creating a resource master record. Enter a value from UDC 42/WD (Work Day Calendar Type). The system only uses this value if the Default Calendar Values processing option is set to default calendar values from the processing options.

7. Work Day Calendar Key

Use this processing option to specify the default work day calendar key that is used when creating a resource master record. This code is used to classify values within a calendar type. Enter a value from UDC 48/CK (Calendar Key). The system only uses this value if the Default Calendar Values processing option is set to default calendar values from the processing options.

8. Shift Code

Use this processing option to specify the default shift code that is used when creating a resource master record. Enter a value from UDC 06/SH (Shift Codes). The system only uses this value if the Default Calendar Values processing option is set to default calendar values from the processing options.

9. Manager

Use this processing option to specify the default manager that is used when creating a resource master record.

10. Supervisor

Use this processing option to specify the default supervisor who is used when creating a resource master record.

11. Site

Use this processing option to specify the default site that is used when creating a resource master record.

12. Workcenter Branch

Use this processing option to specify the default work center branch that is used when creating a resource master record.

13. Active/Inactive

Blank = Active
1 = Inactive

Use this processing option to specify whether the resource is active or inactive when the resource master record is created. Valid values are:

Blank

Active

1

Inactive

14. Percentage - Assignment

Use this processing option to specify the default assignment percentage that is used when creating a resource master record. The system uses this information to determine what proportion of a resource's time is allocated to a task.

15. Time Zone

Use this processing option to specify the default time zone that is used when creating a resource master record. Use of the time zone when displaying date and time for resources is scheduled for a future release.

16. Daylight Savings Rule

Use this processing option to specify the default daylight savings rule that is used when creating a resource master record. Use of the daylight savings rule when displaying date and time for resources is scheduled for a future release.

Defaults - Attributes tab

These processing options control the default resource attributes that the system uses to update the Resource Master table.

1. Resource Attribute 01

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/01 (Resource Attribute 01).

2. Resource Attribute 02

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/02 (Resource Attribute 02).

3. Resource Attribute 03

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/03 (Resource Attribute 03).

4. Resource Attribute 04

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/04 (Resource Attribute 04).

5. Resource Attribute 05

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/05 (Resource Attribute 05).

6. Resource Attribute 06

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/06 (Resource Attribute 06).

7. Resource Attribute 07

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/07 (Resource Attribute 07).

8. Resource Attribute 08

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/08 (Resource Attribute 08).

9. Resource Attribute 09

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/09 (Resource Attribute 09).

10. Resource Attribute 10

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/10 (Resource Attribute 10).

11. Resource Attribute 11

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/11 (Resource Attribute 11).

12. Resource Attribute 12

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/12 (Resource Attribute 12).

13. Resource Attribute 13

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/13 (Resource Attribute 13).

14. Resource Attribute 14

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/14 (Resource Attribute 14).

15. Resource Attribute 15

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/15 (Resource Attribute 15).

16. Resource Attribute 16

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/16 (Resource Attribute 16).

17. Resource Attribute 17

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/17 (Resource Attribute 17).

18. Resource Attribute 18

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/18 (Resource Attribute 18).

19. Resource Attribute 19

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/19 (Resource Attribute 19).

20. Resource Attribute 20

Use this processing option to specify the default resource attribute that is used when creating a resource master record. The system uses this information to classify resources for specific scheduling requirements. Enter a value from UDC 48/20 (Resource Attribute 20).

Working with Resource Assignments

After you define your resources in the Resource Master and set up their capacity by associating them with a work hour calendar, you can start assigning resources to work orders or work order labor detail.

You assign resources to work orders or work order labor detail by using the Resource Assignment program (P48331). This program allows you to search for work orders and resources, and to carry out the assignment. You define work order types in the Resource Assignment Level UDC table (48/RL) to enable resource assignment on the labor detail level.

Note

Because resources cannot be assigned to a work order header and a work order labor detail line on the same work order, the word *task* is used when referring to an assignment process that can be carried out at either the work order or work order labor detail level, based on the Resource Assignment Level UDC table.

You can locate work orders by applying search criteria. For example, you can locate work orders by manager, work site, status, and order type. Additionally, you can display work orders that are based on whether an assignment already exists. If you are working with engineer-to-order projects, you can search for work orders by project number. You can set default values on the Defaults tab of the processing options for some of the search fields. The detail area displays the information for the work orders that match the search criteria.

If work order labor detail exists for a work order and you are assigning resources at this level, it is displayed in the detail area below the work order. You can set a processing option on the Process tab to automatically display the labor detail below a work order. If a resource assignment already exists for a task, it always appears with the associated task, and its associated assignment details appear in the detail area.

When you select a task that requires a resource, you can review the available resources in the Resource Search area. You search for resources by resource type. If a supervisor or work center branch is associated with the task, that information is supplied to the resource search fields by default to limit the search for available resources.

If the basic resource search does not provide enough search criteria, you can use the Advanced Search option to access the Resource Master Search & Select program (P48310S). This program allows you to apply additional search criteria (for example, job type and competency) to match a resource to the requirements of a particular task. If you have already defined competency information on the labor detail line, the system uses this information as search criteria on the Resource Master Search & Select form. However, you can change the search criteria if necessary. You can review the availability of or current assignments for all of the resources that are retrieved by this search in the Resource Detail area.

Resource assignments can be carried out on the Work with Resource Assignments form by selecting a task and an available resource, and by using the Arrow button in the center of the form to make the actual assignment.

Prerequisites

- ❑ Add equipment or individual resources to the resource master.
- ❑ Add base calendars for resources.
- ❑ Define the Resource Assignment Level by work order document type in the UDC table 48/RL.
- ❑ Set up a Supply & Demand inclusion rule to determine what work order status values will display assignments and resource capacity.
- ❑ Review processing options on the Default and Process tabs and set the desired values.

Locating Work Orders

To narrow the search for work orders on the Work With Resource Assignments form, use the filter criteria on the following tabs:

- People
- Schedule
- General
- Status
- Order Definition
- Project
- Cat Codes 1 – 5
- Cat Codes 6 – 10

On the People tab, you can specify that the organizational filters, such as Manager or Supervisor, to display the work orders that are related to a particular team.

On the Schedule tab, you can specify a date range with the following characteristics for the schedule period:

- The number of periods and the period type defined in the processing options determines the date range.
- The starting work day in the processing options controls the default Schedule Start Date for the date range.
- The work order or labor detail start or requested dates must be within this range to display in the detail area.

On the Order Definition tab, your choice of order type can be used to align your filter with the level at which you can assign resources. You can assign resources to the work order or work order labor details, based on whether the work order document type appears in the Resource Assignment Level UDC table 48/RL.

From this form, you also can run the Work Order Backlog Download (R13460) to extract the work order, labor details, and assignment details, based on the filter selection over the work order backlog, and download this information to .csv text files.

Related Tasks

Once you have located work orders, you can choose to review or change work order information. You can select a work order or instruction on the Work With Resource Assignments form and access the programs that allow you to make changes.

To make changes to the work order, choose Work Order on the Row menu or click Work Order. Depending on the setup on the WO Entry tab of the processing options, this option calls either the Work Order Revisions program (P17714) or the Manufacturing Work Order Processing program (P48013).

To make changes on work order instructions, you can choose Instructions on the Row menu or click Instructions to call the Work Order Routing program (P3112).

► To locate work orders

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, complete any of the following fields to limit the search for work orders:
   - Manager
   - Supervisor
   - Customer
   - Site
   - Business Unit
   - Asset Number

   Note

   Depending on the setting in Equipment Constants, this field might be displayed as Unit Number or Serial Number.

   - Status From / To
   - Est. Hours From / To
   - Estimated Downtime
   - Order Type
   - Type
   - Priority
   - Order Number
   - Parent W.O.
   - Project Number

Note

Use the Project Number filter field to display work orders that are associated with an ETO project.

- Phase
- Category 02
- Category 03
- Category 04
- Category 05
- Status
- Service Type
- Skill Type
- Experience Level
- Category 10

The following fields on the Schedule tab are populated by the values set in the processing options.

- Scheduled Start Date
- Scheduled End Date

2. To display work orders according to whether resources have been assigned to them, click one of the following options on the Schedule tab:
   - All
   - Assigned
   - Not Assigned
3. Click Find.

   The work orders that match your search criteria appear in the detail area, in a tree structure that shows the work orders and their associated instructions, as well as any resource assignments that are already made. Each row provides detailed information about the task.

Locating Resources

The Resource Assignment program (P48331) provides two methods for locating resources that can be assigned to tasks:

- A basic search

  The basic search is activated by clicking the Find Resources icon in the Resource Search area of the Work with Resource Assignments form. The default value for the Resource Type field can be set on the Defaults tab of the processing options. The filter fields in this area, such as Supervisor or work center from the work order labor detail, are populated from the selected task if the corresponding record fields contain a value. The detail area displays the current available hours for each matching resource. The current available hours are calculated by using the resource's capacity and current assignments.

- An advanced search

  The advanced search uses the Resource Master Search & Select program (P48310S), where you can conduct a more detailed search for resources. If you have the HR/Payroll system installed, you can search by job type/step code from Payroll or the competency type, code, and level from HR. If you do not have the HR/Payroll system installed, you can use the resource attributes to set up this type of information for resources. The detail area displays the current available hours for each matching resource. The current available hours are calculated by using the resource's capacity and current assignments.

You can define the competencies that are required to complete a particular task in the Work Order Labor Detail program (P17732). The competencies can also default in from the Work With Routing Master program (P3003). Additionally, you can add blind assignments on the Resource Assignment Detail form (blank resource assignment) and then define competencies for each assignment. The competencies that you define act as search criteria in the Resource Master Search & Select program when you search for resources to assign to a task.

Once resources are retrieved, you can check their capacity and existing assignments for a particular time period. The availability of a resource is calculated based on the resource calendar and the Resource Working Hours table (F48307). The assigned load is calculated based on existing assignments for the time period.

Resource assignments can be displayed either in days or in weeks, depending on the setting of the processing options. The Schedule Start Date on the work order filter tab supplies the default value for the Project From date; this value can be overridden.

Prerequisite

- ❑ Set the period type and the number of periods on the Process tab of the processing options to determine the time frame for which resource capacity will be displayed in the resource detail tree.

► To locate resources using a basic search

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, complete the following field in the Resource Search area:

   - Resource Type

   The following fields derive default values from the selected work order or task record, if the associated fields contain data:

   - Resource Attribute 01
   - Resource Type
   - Supervisor
   - Workcenter Branch

2. Click the Find Resources button in the Resource Search area.

   The list box below the search area displays the available resources in a folder, labeled by resource type. If a resource is set to inactive on the resource master, it does not appear.

3. To view the availability of the resource for the scheduled period, click the name of the resource.
4. Choose Assignments or Availability from the drop-down list, and click the header of the tree structure.

   The resource assignment tree in the lower-right area of the form displays assignments or availability for the resource for every day or week of the scheduled period. The availability information is based on the calendar information that is associated with the resource.

► To locate resources using Advanced Search

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, click Advanced Search.
2. On Resource Master Search & Select, click the People tab and complete any of the following fields:
   - Manager
   - Supervisor
   - Resource Type
   - Resource Number
3. Click the General tab and complete any of the following fields:
   - Site
   - Workcenter Branch
   - Project From Date
4. Click any of the following options in the Resource Status area:
   - Active
   - Inactive
   - All
5. Click the Competency tab and complete the following fields:
   - Job Type / Step
   - Competency Type
   - Competency Code
   - Competency Level From
   - Competency Level To
6. Click the Calendar tab and complete the following fields:
   - Calendar Type
   - Calendar Value
   - Branch
   - Shift Code

Note

You can also use the fields on the Attributes tabs as additional search criteria.

7. Click Find.

   The resources that are set up in the Resource Master table (F48310) and that match the search criteria appear in the detail area.

   The detail area displays the current availability of the resource for the period starting from the Project From date. The current availability is the capacity less the current assignments for the resource.

   If a search by competency is carried out, the matching competency code information for the resource appears in the detail area.

8. Choose a resource and click Select.

   The resource appears in the resource list on the right side of the Work With Resource Assignments form.

Assigning Resources to Tasks

After you have retrieved the tasks that require resources, as well as the available resources, you can perform the actual assignment on the Work With Resource Assignments form.

To assign a resource to a task, select the task and the resource, and then click Assign Resource. Once the resource is assigned, the resource and the task to which that resource is assigned are shown in the work order tree structure.

You can also delete a resource assignment on the Work With Resource Assignments form by selecting the resource assignment and clicking the Unassign Resource button. On this form, however, you cannot change any assignment details. To change assignments details, you need to access either the Resource Assignment Detail or the Assignment Detail Review form. If you delete a work order or a labor detail step with existing resource assignments, these assignments are also deleted.

When you assign resources at the work order level, you can set processing options to insert resource assignments automatically in the Assigned To field on the work order header. You can only assign individual resources, not equipment. If you assign more than one resource to a work order, the Assigned To field contains the address book number of the primary resource. You have to set a processing option for the Resource Assignment program (P48331) to update the work order Assigned To field. In addition, you can set a processing option for the following programs to create individual resource assignments:

- Work Order Revisions (P17714)
- Preventive Maintenance Backlog (P12071)
- Update PM Schedule Status (R12807)

When this processing option is enabled, the system validates the address book number that was entered in the Assigned To field against the Resource Master table (F48310). In addition to assigning resources using the Resource Assignment program, you can also insert, update, or delete resource assignments in the Work Order Revisions program. You can choose a resource by using the Search button on the Assigned To field to call the Resource Master Search & Select program (P48310S). Since the work order header only includes one Assigned To field, this field typically holds the address book number of the primary resource for the work order, if more than resource was assigned.

Note

If you delete the assignment of the resource in the Assigned To field and other resources are assigned to the work order, the system updates the Assigned To field with the address book number of the resource who is assigned with the largest number of hours. If the other resources are assigned with an equal number of hours, the system uses the resource that was first assigned to the work order.

When you create a work order by running the Update PM Schedule Status program (R12807), the system can create a resource assignment if the Assigned To field on the model work order contains a value and if the processing option is set to create resource assignments. On the PM Schedule that you created, the Employee field is updated with the Assigned To address book number. In the Preventive Maintenance Backlog program (P12071), you can change the Employee, thus updating the Assigned To field in the associated work order.

When resources are assigned to tasks, the system automatically checks the resource's capacity when calculating the assignment start and end dates. The assigned hours and the assignment end date are calculated as follows:

- Assigned Hours

  If you assign more that one resource to a task, the assigned hours for each resource are automatically distributed equally among them. This distribution is by resource type, so individuals and equipment resources are distributed separately, based on the estimated hours.

  When resources are assigned at the work order level, the individual and equipment resources are matched against the work order estimated hours.

  When resources are assigned at the labor detail level, the individual resources are matched against the labor run hours, while the equipment resources are matched against the machine run hours.

- Assignment Start Date

  The assignment start date is calculated by using the task start date and the resources capacity. If no resource capacity exists, the start date automatically moves to the next date that has some capacity.

- Assignment End Date

  The assignment end date is calculated by using the assignment start date, assigned hours, assignment percentage, and the resources capacity.

  Once the assignment is made, you can review the resource’s capacity, load, and current assignments in the resource detail area. You can use the Supply/Demand Inclusion Rules (P34004) to define which tasks are included in the availability calculation and displayed in the assignment detail section.

All assignments for a selected task are shown on the Resource Assignment Detail form. You can call this form directly from the Work with Resource Assignments form by choosing the Assignment Details option on the Row menu. Alternatively, you can call this form by choosing the Row exit on the Assignment Detail Review form. On Resource Assignment Detail, you can add, update, and delete assignments.

You can review the resource assignments that you made in summary format or detail format. To review in summary format, choose Summary Review on the Form menu. The Assignment Summary Review form is primarily a review form; for example, a supervisor could review all assignments for his or her team.

To review in detail format, choose Detail Review on the Form menu. The Assignment Detail Review form allows you to use filter criteria to select resource assignments for review. It also allows you to make changes to assignments within the grid—for example, task description, assignment start and end dates, and assignment percent. Choose the Row exit to call the Resource Assignment Detail form, where assignments also can be revised.

► To assign resources to tasks

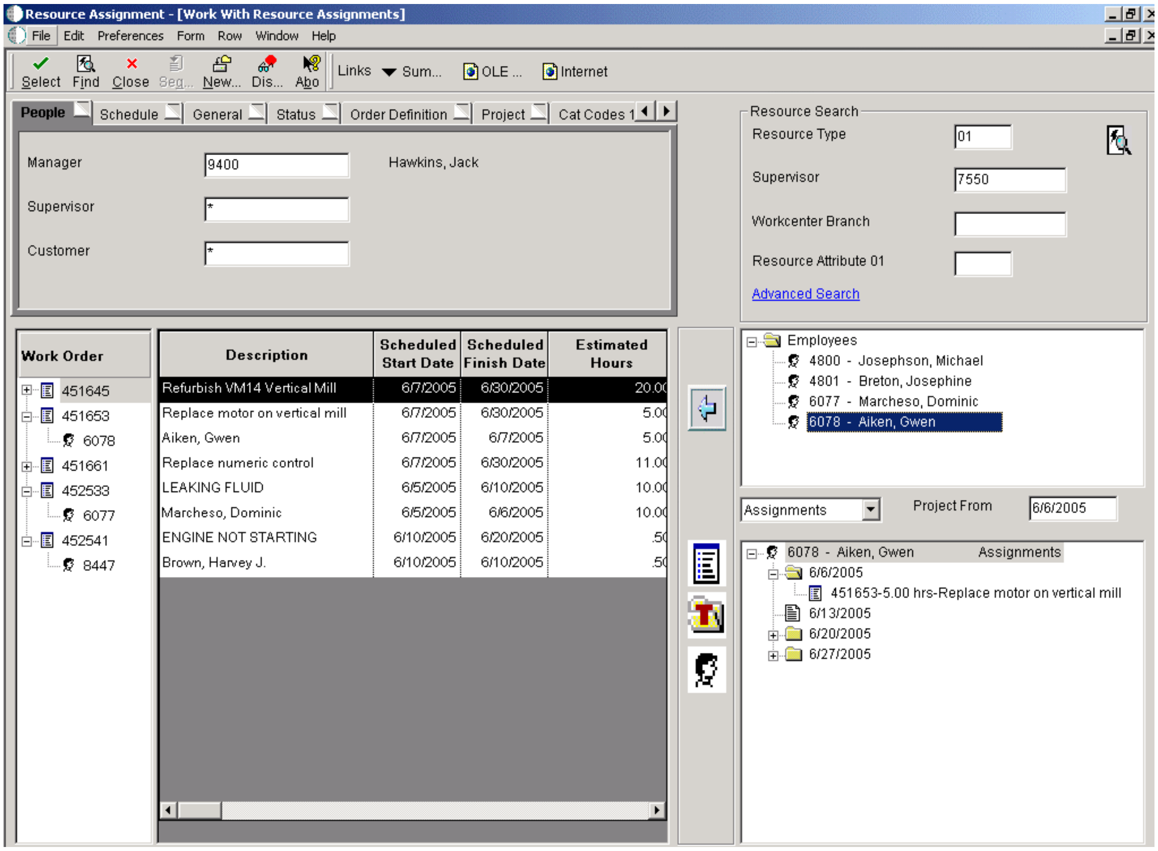
From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, retrieve the work orders and resources with which you want to work.
2. Choose the task to which you want to assign resources.
3. From the available resources, select the resource that you want to assign to the selected task.
4. Click the Assign Resource arrow.

   The selected resource appears in the work order tree structure. The detail information (for example, the work hours loaded to the resource) appears in the detail area.

5. If you assign more than one resource to a task, click Find after assigning the last resource.

   The hours that are required to complete the task are distributed equally to all assigned resources.



6. To view the change in availability for the selected resource, select Availability or Assignments from the drop-down box, and click the header of the resource details tree.

► To delete resource assignments

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, retrieve the work orders and resources with which you want to work.
2. Choose the resource that you want to remove.
3. Click the Unassign Resource arrow.

   The resource is removed from the task.

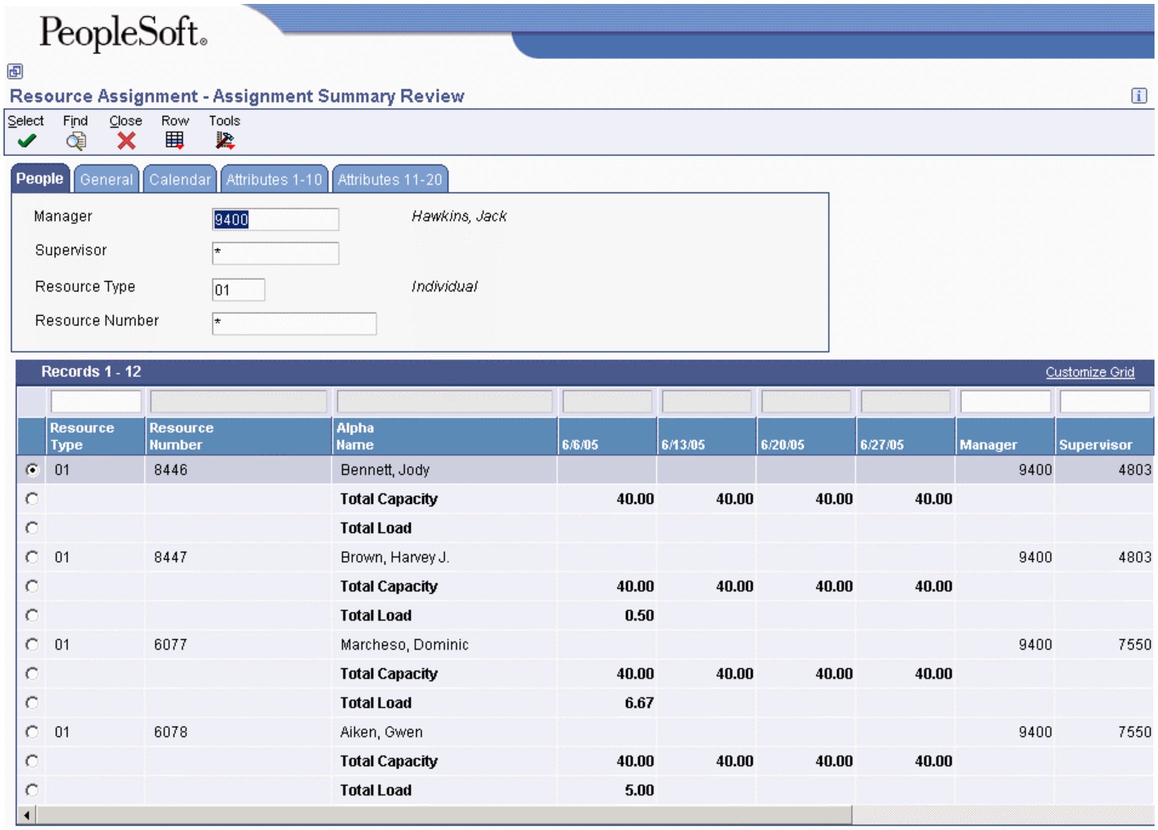
4. To show the change in availability for the selected resource, click the name of the resource.

   The resource assignment tree indicates that the resource is free; previously, it contained an assignment.

► To review summarized resource assignments

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, assign resources to tasks.
2. From the Form menu, choose Summary Review.



3. On Assignment Summary Review, click Find to display the summarized assignment information.

   In the detail area, you can review capacity and assignment workload information for the resources, which are displayed for every day or week of the scheduled period.

4. To limit the information that appears in the detail area, complete any of the search fields on this form and click Find.

   The resource assignments for the selected manager's team appear in the detail area.

5. To move the schedule, change the date in the following field:

   - Scheduled Start Date

6. Click Find.

   The system updates the headings and information in the detail area, based on the new scheduled start date. If an assignment extends over a number of periods and the scheduled start date is within that range, the estimated remaining hours have to be calculated for loading the detail area beyond the scheduled start date.

Note

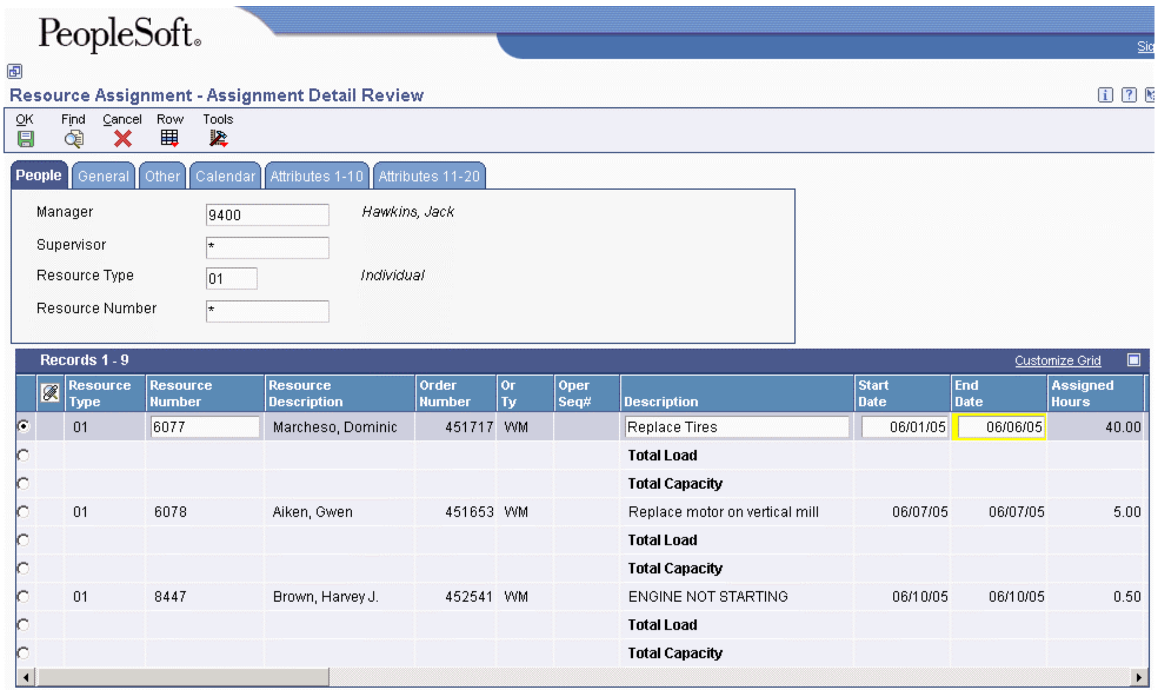
You cannot change assignments on this form. If you need to change assignments, you can do so on the Resource Assignment Detail and Assignment Detail Review forms.

► To review resource assignments in detail

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, assign resources to work orders or instructions.
2. From the Form menu, choose Detail Review.

   You can also access the Assignment Detail Review form by choosing a record and then choosing Detail Review from the Row menu on Assignment Summary Review.



3. On Assignment Detail Review, click Find.

Note

To limit the search for resource assignment information, you can complete the search fields in the header area of this form.

4. Review the resource assignment information in the detail area.

   You can review resource assignment information such as the tasks to which the resource is assigned, the hours required for completion, and the percentage of the resource's capacity that is assigned to a task.

Revising Resource Assignments

Once resources are assigned to tasks, the application provides methods for revising assignment details for a particular task.

The Resource Assignment Detail form displays all of the current assignments for a particular task and allows you to add, update, or delete assignments on the task. You use this form when multiple assignments exist on the task, and you want to adjust the dates and assigned hours for all of the assignments to keep them aligned. On this form, you can update the resource assigned, assignment hours, start and end dates, assignment percentage and competency information. If multiple assignments exist, the sum of the assigned hours has to be less than or equal to the estimated hours on the task. A form exit can be used to distribute the hours evenly.

The Assignment Detail Review form displays all of the current assignments for a particular resource and allows you to update assignment details. This form is used to balance the load for a resource across all of the tasks assigned to this resource for the current schedule period. On this form, you can update the resource assigned, assignment start and end dates, assignment percentage and competency information.

The Work Order Revisions program (P17714) allows you to change the scheduled start and finished dates, which, in turn, can update the dates in the Work Order Labor Detail program (P17732), based on a processing option. The system updates the resource assignments at the work order or labor detail level with these date changes. The system does not check resource capacity at this point. Use the Resource Assignment Detail form to make adjustments manually, if necessary.

You update the work order estimated hours by using either the Work Order Revisions program (P17714) or Work Order Labor Detail program (P17732). The system uses this value to update the assignment hours for existing assignments on the work order.

Use the Work Order Labor Detail program (P17732) to change the scheduled start and finish dates for a labor detail step. The system uses these dates to update an existing assignment's start and finish dates for this step. The system does not check resource capacity to calculate the assignment start and finish dates.

Change the estimated hours for a labor step in the Work Order Labor Detail program (P17732). If you change the estimated hours on a labor detail line, the system uses this value to update the associated individual assignments. If you change the run machine hours, the system updates the associated asset assignments.

Changes to the labor detail key values (work center, operation sequence, operation type) also automatically update the associated assignment.

► To revise resource assignments

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. Choose a resource assignment in the detail area.
2. From the Row menu, choose Assignment Detail.

   On Resource Assignment Detail, the work order and resource assignment details are shown. In addition, if the work order is part of an engineer-to-order (ETO)project, the project number is also shown.

Note

The fields on the Work Order Details and Labor Detail tabs are not input-capable; their purpose is to display work order dates, estimated hours, and other information about the selected work order.

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3. In the detail area of Resource Assignment Detail, update the following task assignment information:

   - Resource Type
   - Resource Number

     Apply this change to transfer an assignment to another resource because the original resource does not have enough capacity.

     If you change the resource type, ensure that the spread of the assigned hours matches the estimated labor and machine hours.

   - Start Date

     If you update the start date, the assignment end date is recalculated, based on the assigned hours, assignment percent, and current capacity of the resource.

   - End Date

     If you clear the end date, it will be recalculated, based on the start date, assigned hours, assignment percentage, and current capacity of the resource. This process typically occurs when the end date is selected, which indicates that the task will not be completed on the current end date at the current capacity.

     If you update the end date, the assignment percent is recalculated, based on the start date, assigned hours, and current capacity of the resource.

   - Assigned Hours

     If you update the assigned hours, the assignment end date is recalculated, based on the start date, assignment percent, and current capacity of the resource.

     For more than one assignment, manually distribute the assigned hours among the resources or use the Distribute Hours option on the Form menu to automatically distribute the assigned hours.

     The total assigned hours by resource type cannot exceed the estimated hours of the task.

   - Assignment Percent

     If you update the assignment percent, the assignment end date is recalculated, based on the assigned hours, assignment percent, and current capacity of the resource.

   - Assignment Description

4. To delete an assignment, choose the row with the information, click Delete, and click OK on Confirm Delete.

5. To add an assignment, click the first field of the first blank row and enter the applicable information.
6. Click OK to accept the changes.

Notes

You can also update task assignment information on the Assignment Detail Review form. Because the detail area displays all of the assignments by resource, you can review the current assignments of the resources and adjust the assignment details to resolve capacity constraints.

You cannot add or delete assignment information on the Assignment Detail Review form. You can only update existing information.

Except for Resource Type and Assigned Hours, the same detail area fields are available for updating as on the Resource Assignment Detail form. As on the Resource Assignment Detail form, you must click OK to save the changes.

Processing Options for Resource Assignments (P48331)

Defaults Tab

These processing options control default values for the filter fields on the Work With Resource Assignments form.

1. Address Number - Manager

Use this processing option to specify the manager whom the system uses to search for work orders.

2. Supervisor

Use this processing option to specify the supervisor whom the system uses to search for work orders.

3. Customer

Use this processing option to specify the customer whom the system uses to search for work orders.

4. Scheduled Start Date

Use this processing option to specify the scheduled start date. The system uses this date when searching for work orders. If you leave this processing option blank, the system uses the system date with the Starting Workday processing option to determine the scheduled start date.

5. Scheduled End Date

Use this processing option to specify the scheduled end date. The system uses this date when searching for work orders. If you leave this processing option blank, the system uses the scheduled start date with the Number of Periods and Period Type processing options to determine the scheduled end date.

6. Order Type

Use this processing option to specify the order type. The system uses this default when searching for work orders. Enter a value from UDC 00/DT (Document Type - All Documents).

7. Type - W.O.

Use this processing option to specify the classification of work orders or engineering change orders. The system uses this default when searching for work orders. Enter a value from UDC 00/TY (Work Order/ECO Type).

8. Priority

Use this processing option to specify the relative priority of a work order or engineering change order in relation to other orders. The system uses this default when searching for work orders. Enter a value from UDC 00/PR (Work Order Priority).

9. Work Order Status From

Use this processing option to specify the beginning status code for a range of work orders. The system uses this default when searching for work orders. Enter a value from UDC 00/SS (Work Order Status).

10. Work Order Status To

Use this processing option to specify the ending status code for a range of work orders. The system uses this default when searching for work orders. Enter a value from UDC 00/SS (Work Order Status).

11. Service Address Number

Use this processing option to specify the service address number (site) that the system uses to search for work orders.

12. Business Unit

Use this processing option to specify the business unit that the system uses to search for work orders.

13. Parent W.O. Number

Use this processing option to specify the parent work order that the system uses to search for work orders.

14. Project Number

Use this processing option to specify the EPM (engineering project management) number that the system uses to search for work orders.

15. Resource Type

Blank = 01

Use this processing option to specify the default resource type. The system uses this to determine what type of resources to display. Enter a value from UDC 05/RT (Record Type). If you leave this processing option blank, a resource type of 01 is used. Valid values are:

01

Individual

02

Asset, such as equipment

16. Resource Details

Use this processing option to specify the type of details that display for a resource. Enter a value from UDC 48/RD (Resource Details).

17. Resources Assigned

Blank = All

0 = Not Assigned

1 = Assigned

Use this processing option to specify whether the Resource Assignment program (P48331) displays only those work orders that have resources assigned to them, those without resource assignments, or both. Valid values are:

Blank

Display all work orders.

0

Display only work orders without resource assignments.

1

Display only work orders with resource assignments.

18. Load Profile Method

Use this processing option to specify the load profile method. The system uses the method to distribute the work across the duration of an assignment when a resource is assigned. For example, when using the flat load profile, the system spreads the work for an assignment evenly over the duration. Currently, the system uses only the flat load profile (1), which is also the default value. Enter a value from UDC 48/LP (Load Profile Method).

Process Tab

These processing options control processing in the Resource Assignment program.

1. Number of Periods

Range (1-52)

Use this processing option to specify the number of periods that the system uses to calculate availability and assigned workloads. Periods are expressed as days or weeks, based on the value in the Period Type field. Enter a value within a range of 1 to 52.

2. Period Type

Blank = Days

Use this processing option to specify the period type that the system uses to group the display of assigned hours and capacity hours for a resource. Enter a value from UDC 48/PT (Period Type). If you leave this processing option blank, the system uses Days as the period type.

3. Starting Workday

Blank = Monday

Use this processing option to specify the starting workday. The system uses this processing option with the system date to determine the scheduled start date that is used when searching for work orders. Enter a value from UDC 48/WD (Work Day).

Note: The system uses this processing option only if the Scheduled Start Date processing option is blank.

4. Supply/Demand Inclusion Rule

Use this processing option to specify the supply/demand inclusion rule that the system uses to calculate availability.

For assignments at the work order level, the system determines if the assignment is included in availability calculations by using the rule in this processing option, the work order document type (DCTO), and the work order status (SRST).

For assignments at the labor detail level, the system determines if the assignment is included in availability calculations by using the rule in this processing option, the work order document type, and the operation status (OPST). If the Operation Status field is blank, the system uses the work order status.

If you leave this processing option blank, the system calculates availability by using all assignments that have been identified for inclusion.

5. Automatically Expand Instructions

Blank = Do not automatically expand
1 = Automatically expand

Use this processing option to specify whether the system automatically expands the tree structure when displaying work orders on the Work With Resource Assignments form. The expanded tree structure shows the labor detail steps for work orders. Valid values are:

Blank

Do not automatically expand the tree structure.

1

Automatically expand the tree structure.

6. Update Work Order Assigned To field

Blank = Do not update
1 = Update Assigned To field

Use this processing option to specify whether the system automatically updates the Assigned To field on the work order header when you update assignments with the Resource Assignment program (P48331). This only applies when you assign resources at the work order level. In addition, the system updates the Assigned To field only when it is blank or you change an assignment resource number that is the same as the number on the work order. Valid values are:

Blank

Do not update the Assigned To field.

1

Update the Assigned To field.

Versions Tab

These processing options control which versions the system uses when the following programs are called:

1. Routing Instructions (P3112) Version

Blank = ZJDE0001

Use this processing option to specify which version of Routings (P3112) will be used. If this field is left blank, the default version (ZJDE0001) will be used.

2. Labor Details (P17732) Version

Blank = ZJDE0001

Use this processing option to determine which version of Work Order Labor program (P17732) the system uses. If you leave this processing option blank, version ZJDE0001 is used.

3. Work Order Backlog Download (R13460) Version

Blank = XJDE0001

Use this processing option to specify the version of the Work Order Backlog Download program (R13460) that the system uses. If you leave this processing option blank, the system uses version XJDE0001.

WO Entry Tab

These processing options control which work order entry program and version the system uses.

1. Work Order Program

1 = Work Order (P17714)
2 = Manufacturing Order (P48013)

Use this processing option to specify the work order program that the system uses when you select a work order to review. Valid values are:

1

Use Work Order Revisions (P17714).

2

Use Manufacturing Work Order Processing (P48013).

Note: This processing option also specifies the routing/labor detail program the system uses. For value 1, the system uses the Work Order Labor Detail program (P17732). Otherwise, the system uses the Work Order Routing program (P3112).

2. Work Order Program Version

Blank = ZJDE0001

Use this processing option to specify the version of the selected work order program. If this option is left blank, the default version (ZJDE0001), will be used.

Working with Resource Assignments (Web)

The Work With Resource Assignments form is also available in an HTML-only format. If you use PeopleSoft EnterpriseOne on the Web, the navigation through the Resource Assignment program (P48331) is different than in the Windows version. The tasks below describe the differences in navigation.

In addition to the functionality available in the Windows version, the Web-enabled Resource Assignment program allows you to:

- Assign resources to multiple tasks.
- Delete all resources on selected tasks.
- Search for resources by resource number.
- Display availability on the resource search list.
- Display additional details on resource assignments and availability.

► To locate work orders (web)

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, complete any of the following fields on the Work Order Details tab to limit the search for work orders:
   - Manager
   - Supervisor
   - Scheduled Start Date
   - Scheduled End Date
2. Complete any of the following fields on the Advanced Search tab and click the Find button:
   - Customer
   - Site Address Number
   - Business Unit
   - Serial Number
   - Order Type
   - Type
   - Priority
   - Order Number
   - Parent W.O. No
   - Project Number

Note

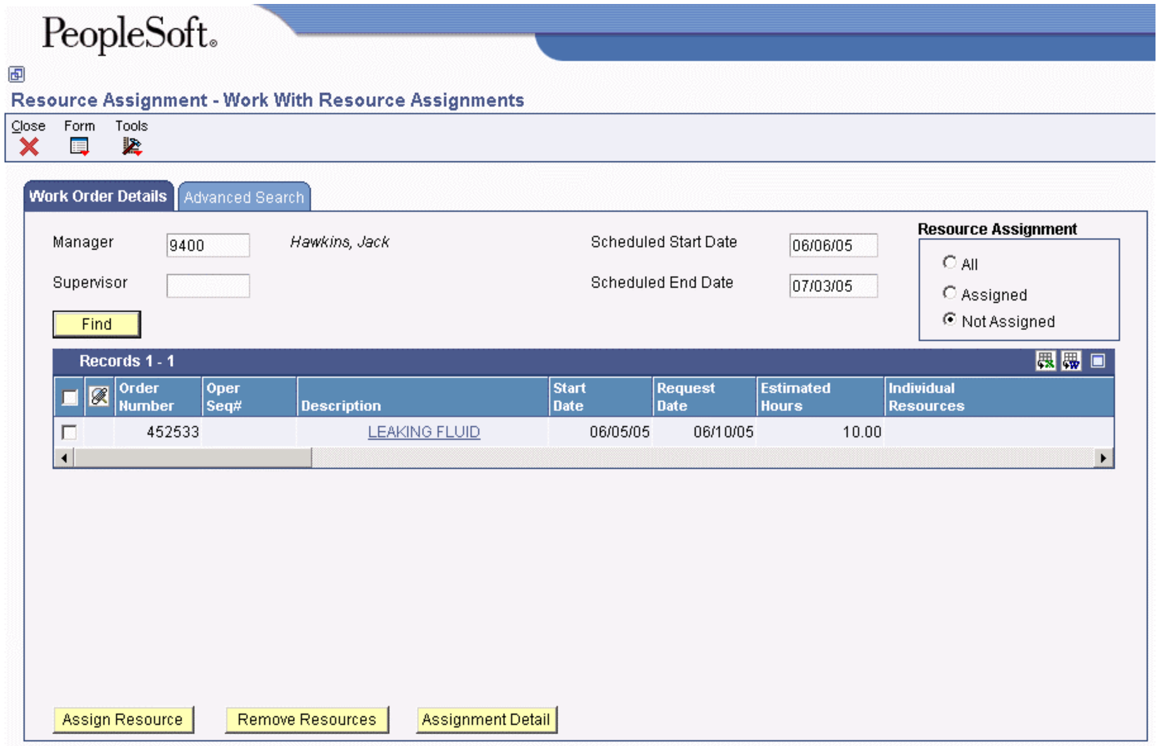
You can set default values in the processing options for any of the fields above.

Use the Project Number field to display work orders that are associated with an engineer-to-order project.

- Phase
- Category 02
- Category 03
- Category 04
- Category 05
- Status
- Service Type
- Skill Type
- Experience Level
- Category 10
- Status From/To
- Est. Hours From/To
- Estimated Downtime Hours From/To

3. To display work orders according to whether resources have been assigned to them, click one of the following options:

   - All
   - Assigned
   - Not Assigned



► To locate resources (Web)

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, complete the following field on Resource Search and click Find:

   - Resource Type

     The resources that match the search criteria appear in the detail area. The system calculates the availability based on calendar information and current assignments.

Note

You can set default values for the following fields in the processing options:

- Resource Type
- Manager
- Supervisor

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2. If you know the resource that you want to assign, complete the following field and click the Find button:

   - Resource Number

     The detail area displays resources that can be assigned to a task. If a resource is set to inactive on the resource master, it does not appear here.

3. To access the Resource Advanced Search, click the Search button on the Resource Number field.
4. On Resource Master Search & Select, enter the desired search criteria and click Find.
5. Choose the resource that you want to use and click Select.

   The selected resource is displayed on the Resource Search sub form on Work With Resource Assignments.

6. Click the Find button.
7. To review availability and assignments for a resource, select the resource on Resource Search.

   You can review availability and assignment information for the resource in the detail area at the bottom of the form for every day or week of the scheduled period. The Availability tab provides details about the capacity, load, and resulting availability. The Assignments tab displays the current assignments for the schedule period and displays the assignment details and load profile.

8. To view availability and assignments for another resource, choose the resource on Resource Search.

   The system automatically displays availability and assignments for the selected resource.

► To assign resources to tasks (Web)

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

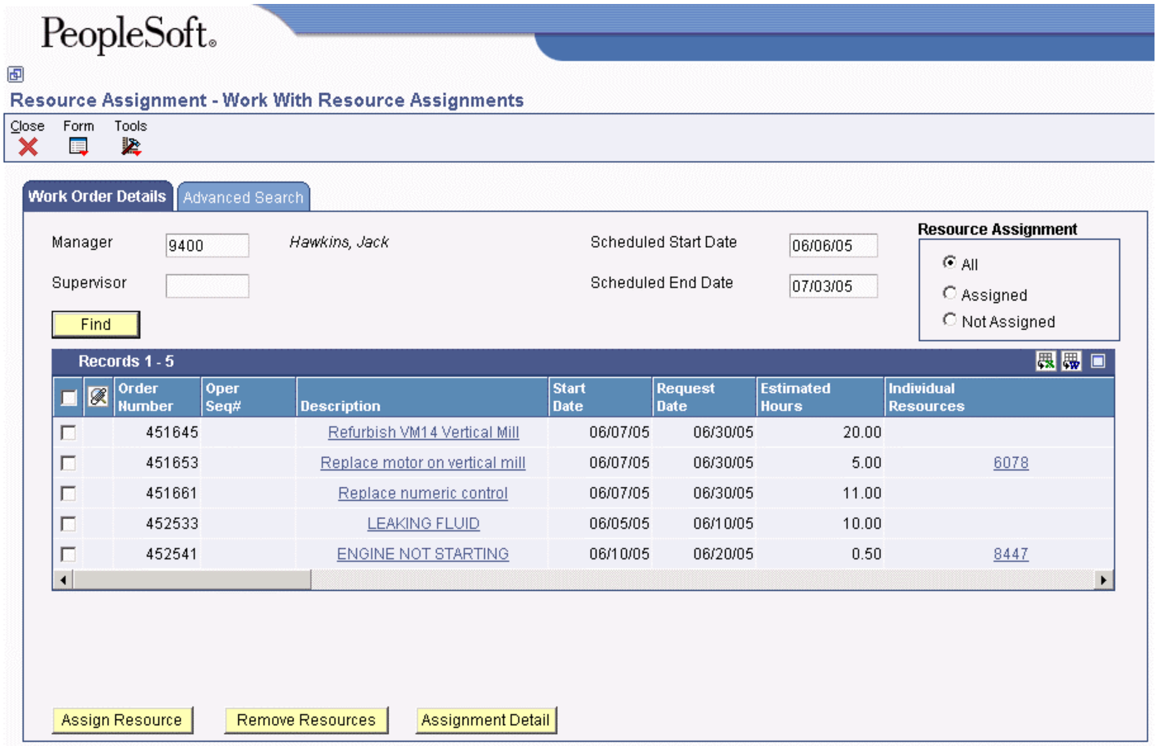
1. On Work With Resource Assignments, locate the work orders and resources with which you want to work.
2. Choose the tasks to which you want to assign a resource.

   Note

   You can assign a resource to multiple tasks at the same time.

3. From the available resources, select the resource that you want to assign to the selected task.
4. Choose Assign Resource.

   Depending on whether the resource you assigned is an employee or a piece of equipment, the resource number of the assigned resource appears in either the Individual Resources or the Equipment Resources column.



Note

If you assign more resources to a task than can be displayed in the column, the system appends a plus sign to the list of resources. You must access the Resource Assignment Detail form to view the assignments.

5. To view the changes in the assignment and availability information for the resource that you assigned, click Find on Resource Search and choose the resource that you just assigned to a task.

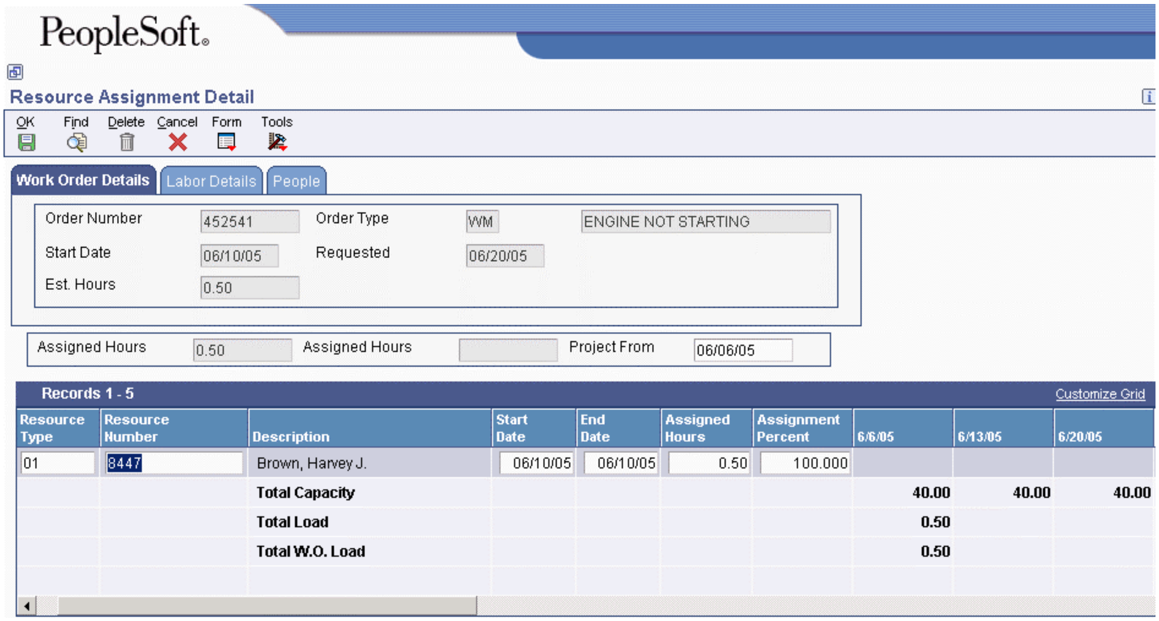
   The system displays the changes in load and availability in the detail area.

► To revise resource assignments (Web)

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. Choose a task to which resources have been assigned.
2. Click the hyperlinked resource number in the Individual Resources or Equipment Resources column to access the Resource Assignment Detail form.
3. On Resource Assignment Detail, make any changes necessary.

   You can delete existing assignments, or add additional assignments.



► To delete resource assignments (Web)

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment.

1. On Work With Resource Assignments, locate the work orders and resources with which you want to work.
2. Choose the work orders from which you want to delete resources.
3. To delete all of the assigned resources from the selected work orders, click Remove Resources.
4. To remove individual resources from a selected work order, click the hyperlinked resource number in the Individual Resources or Equipment Resource field to access the Resource Assignment Detail form.
5. Click Delete to remove the assignment.
6. Click Cancel.
7. To remove assignments for a particular resource, on Resource Search, locate the resource assignments for the resource, and then click the Remove Resource button.

Resource Assignment Reports

The following reports are provided to facilitate the resource assignment process:

- Work Order Backlog Download (R13460)
- Resource Assignment Summary Report (R48341)
- Resource Assignment Detail Report (R48340)

Downloading the Work Order Backlog

From the Daily Resource Assignment Planning menu (G13RA10), choose Work Order Backlog Download.

You use the Work Order Backlog Dowload program (R13460) to allow users to work with resource assignments outside of PeopleSoft EnterpriseOne. You download the work order backlog and assignments to a text file format (CSV). You can then upload this information into a project management package for further processing.

This download process is configured in such a way that customers can use the process as a template for developing their own specific requirements, depending on their data setup and project management software.

By using the Work Order Backlog Download program(R13460), you can download work orders, work order instructions, and assignment details into the following two .csv text files:

- JDEToMSProjTasks.csv

  This file contains task information.

- JDEToMSProjAssign.csv

  This file contains esource assignment information.

You need to create an export folder in the EnterpriseOne software directory for the text files that are generated by the Work Order Backlog Download program. Create this folder before the report is run on the machine for the first time. If the job is run locally, label this folder as follows:

```
C:\B7\Prod Env\Export
```

You can use processing options to specify whether labor details or assignment details are included in the download.

You can also access this program from the Resource Assignment program. (Note though, that this option is not available in the web version of the Resource Assignment program.) If you do access this program from the Resource Assignment program, the work order selections from the workbench are appended to any data selection that is defined for the version that you run.

Processing Options for Work Order Backlog Download (R13460)

Process Tab

These processing options control whether the associated labor detail and assignment detail is downloaded along with the work order information.

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1. Download associated labor detail

Blank = Do not download

1 = Download labor detail (F3112)

Use this processing option to specify whether the system downloads associated labor detail information from the Work Order Routing table (F3112) with the selected work order. Valid values are:

Blank

Do not download the labor detail information.

1

Download the labor detail information.

2. Download associated assignment detail

Blank = Do not download

1 = Download assignment detail (F48311)

Use this processing option to specify whether the system downloads associated assignment detail information from the Resource Assignments table (F48311) with the selected work order. Valid values are:

Blank

Do not download the assignment detail information.

1

Download the assignment detail information.

Generating the Resource Assignment Detail Report (R48340)

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment Detail Report.

Use the Resource Assignment Detail Report (R48340) to generate a detailed list of the jobs and the hours that are assigned to an individual resource. It displays the information that is available on the Assignment Detail Review form.

You use processing options to specify the period type, the starting work day, and the supply/demand inclusion rule that is used to calculate resource availability.

Generating the Resource Assignment Summary Report (R48341)

From the Daily Resource Assignment Planning menu (G13RA10), choose Resource Assignment Summary Report.

Use the Resource Assignment Summary Report (R48341) to generate a summarized list of capacity and assigned workload for resources. This report also calculates totals for the capacity and assignment hours for each resource and for a team, as well as the current assigned hours. The report includes information that is available on the Assignment Summary Review form.

Use processing options to specify the period type, the starting workday, and the supply/demand inclusion rule that is used to calculate resource availability.

Processing Options for Resource Assignment Reports (R48340, R48341)

Defaults Tab

1. Schedule Start Date

Use this processing option to specify the scheduled start date. The system uses this date with the Period Type to determine the dates that are used to display assigned hours and capacity hours for a resource. If this processing option is left blank, the system uses the system date with the Starting WorkDay processing option to determine the scheduled start date.

Process Tab

1. Period Type

Blank = Days

Use this processing option to specify the period type that the system uses to group the display of assigned hours and capacity hours for a resource. Enter a value from UDC 48/PT (Period Type). If you leave this processing option blank, the system uses Days as the period type.

2. Starting WorkDay

Blank = Monday

Use this processing option to specify the starting workday. The system uses this processing option with the system date to determine the scheduled start date when displaying the assigned hours and capacity hours for a resource. Enter a value from UDC 48/WD (Work Day).

Note: The system uses this processing option only if the Scheduled Start Date processing option is blank.

3. Supply / Demand Inclusion Rule

Use this processing option to specify the supply/demand inclusion rule that the system uses to calculate availability.

For assignments at the work order level, the system determines if the assignment is included in availability calculations by using the rule in this processing option, the work order document type (DCTO), and the work order status (SRST).

For assignments at the labor detail level, the system determines if the assignment is included in availability calculations by using the rule in this processing option, the work order document type, and the operation status (OPST). If the Operation Status field is blank, the system uses the work order status.

If you leave this processing option blank, the system calculates availability by using all assignments that have been identified for inclusion.

EnterpriseOne PeopleBooks Glossary

“as of” processing	A process that is run at a specific point in time to summarize item transactions.
52 period accounting	A method of accounting that uses each week as a separate accounting period.
account site	In the invoice process, the address to which invoices are mailed. Invoices can go to a different location or account site from the statement.
active window	The window that contains the document or display that will be affected by current cursor movements, commands, and data entry in environments that are capable of displaying multiple on-screen windows.
ActiveX	A technology and set of programming tools developed by Microsoft Corporation that enable software components written in different languages to interact with each another in a network environment or on a web page. The technology, based on object linking and embedding, enables Java applet-style functionality for Web browsers as well as other applications (Java is limited to Web browsers at this time). The ActiveX equivalent of a Java applet is an ActiveX control. These controls bring computational, communications, and data manipulation power to programs that can “contain” them—for example, certain Web browsers, Microsoft Office programs, and anything developed with Visual Basic or Visual C++.
activity	In Advanced Cost Accounting, an aggregation of actions performed within an organization that is used in activity-based costing.
activity driver	A measure of the frequency and intensity of the demands that are placed on activities by cost objects. An activity driver is used to assign costs to cost objects. It represents a line item on the bill of activities for a product or customer. An example is the number of part numbers, which is used to measure the consumption of material-related activities by each product, material type, or component. The number of customer orders measures the consumption of order-entry activities by each customer. Sometimes an activity driver is used as an indicator of the output of an activity, such as the number of purchase orders that are prepared by the purchasing activity. See also cost object.
activity rule	The criteria by which an object progresses from a given point to the next in a flow.
actual cost	Actual costing uses predetermined cost components, but the costs are accumulated at the time that they occur throughout the production process.
adapter	A component that connects two devices or systems, physically or electronically, and enables them to work together.
add mode	The condition of a form where a user can enter data into it.
advanced interactive executive	An open IBM operating system that is based on UNIX.
agent	A program that searches through archives or other repositories of information on a topic that is specified by the user.

aging	A classification of accounts by the time elapsed since the billing date or due date. Aging is divided into schedules or accounting periods, such as 0-30 days, 31-60 days, and so on.
aging schedule	A schedule that is used to determine whether a payment is delinquent and the number of days which the payment is delinquent.
allegato IVA clienti	In Italy, the term for the A/R Annual VAT report.
allegato IVA fornitori	In Italy, the term for the A/P Annual VAT report.
application layer	The seventh layer of the Open Systems Interconnection Reference Model, which defines standards for interaction at the user or application program level.
application programming interface (API)	A set of routines that is used by an application program to direct the performance of procedures by the computer's operating system.
AS/400 Common	A data source that resides on an AS/400 and holds data that is common to the co-existent library, allowing PeopleSoft EnterpriseOne to share information with PeopleSoft World.
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.
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 return	A feature that allows a user to move to the next entry line in a detail area or to the first cell in the next row in several applications.
availability	The expression of the inventory amount that can be used for sales orders or manufacturing orders.
available inventory	The quantity of product that can be promised for sale or transfer at a particular time, considering current on-hand quantities, replenishments in process, and anticipated demand.
back office	The set of enterprise software applications that supports the internal business functions of a company.
backhaul	The return trip of a vehicle after delivering a load to a specified destination. The vehicle can be empty or the backhaul can produce less revenue than the original trip. For example, the state of Florida is considered a backhaul for many other states—that is, many trucking companies ship products into the state of Florida, but most of them cannot fill a load coming out of Florida or they charge less. Hence, trucks coming out of Florida are either empty or produce less revenue than the original trip.
balance forward	The cumulative total of inventory transactions that is used in the Running Balance program. The system does not store this total. You must run this program each time that you want to review the cumulative inventory transactions total.

balance forward receipt application method	A receipt application method in which the receipt is applied to the oldest or newest invoices in chronological order according to the net due date.
bank tape (lock box) processing	The receipt of payments directly from a customer's bank via customer tapes for automatic receipt application.
base location	[In package management] The topmost location that is displayed when a user launches the Machine Identification application.
basket discount	A reduction in price that applies to a group or "basket" of products within a sales order.
basket repricing	A rule that specifies how to calculate and display discounts for a group of products on a sales order. The system can calculate and display the discount as a separate sales order detail line, or it can discount the price of each item on a line-by-line basis within the sales order.
batch job	A job submitted to a system and processed as a single unit with no user interaction.
batch override	An instruction that causes a batch process to produce output other than what it normally would produce for the current execution only.
batch process	A type of process that runs to completion without user intervention after it has been started.
batch program	A program that executes without interacting with the user.
batch version	A version of a report or application that includes a set of user-defined specifications, which control how a batch process runs.
batch/lot tracking	The act of identifying where a component from a specific lot is used in the production of goods.
batch/mix	A manufacturing process that primarily schedules short production runs of products.
batch-of-one processing	A transaction method that allows a client application to perform work on a client workstation, and then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect, store-and-forward.
binary large object (BLOB)	A collection of binary data stored as a single entity in a [file].
binder clip	See paper clip.
black products	Products that are derived from the low or heavy end of the distillation process—for example, diesel oils and fuel oils. See also white products.
blend note	Document that authorizes a blending activity, and describes both the ingredients for the blend and the blending steps that occur.

blend off	Reworking off-specification material by introducing a small percentage back into another run of the same product.
blind execution	The mode of execution of a program that does not require the user to review or change the processing options set for the program, and does not require user intervention after the program has been launched.
boleto	In Brazil, the document requesting payment by a supplier or a bank on behalf of a supplier.
bolla doganale	VAT-Only Vouchers for Customs. In Italy, a document issued by the customs authority to charge VAT and duties on extra-EU purchasing.
bookmark	A shortcut to a location in a document or a specific place in an application or application suite.
bordero & cheque	In Brazil, bank payment reports.
broker	A program that acts as an intermediary between clients and servers to coordinate and manage requests.
BTL91	In the Netherlands, the ABN/AMRO electronic banking file format that enables batches with foreign automatic payment instructions to be delivered.
budgeted volume	A statement of planned volumes (capacity utilization) upon which budgets for the period have been set.
bunkering	A rate per ton or a sum of money that is charged for placing fuel on board; can also mean the operation itself.
business function	An encapsulated set of business rules and logic that can normally be re-used by multiple applications. Business functions can execute a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the APIs that allow them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	Encapsulated, reusable business logic that is created by using through event rules rather than C programming. Contrast with embedded event rule. See also event rule.
business object library	[In interoperability] The repository that stores EnterpriseOne business objects, which consist of Java or CORBA objects.
business unit	A financial entity that is used to track the costs, revenue, or both, of an organization. A business unit can also be defined as a branch/plant in which distribution and manufacturing activities occur. Additionally, in manufacturing setup, work centers and production lines must be defined as business units; but these business unit types do not have profit/loss capability.

business view	Used by EnterpriseOne applications to access data from database tables. A business view is a means for selecting specific columns from one or more tables with data that will be used in an application or report. It does not select specific rows and does not contain any physical data. It is strictly a view through which data can be handled.
business view design aid (BDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing business views. The tool uses a graphical user interface.
buy-back crude	In foreign producing oil countries, that portion of the host government's share of "participation crude" which it permits the company holding a concession to "buy back."
CAB	In Italy, the bank branch code or branch ID. A five-digit number that identifies any agency of a specific bank company in Italy.
cadastro de pessoas físicas	Cadastro de pessoas físicas. In Brazil, the federal tax ID for a person.
category code	A code that identifies a collection of objects sharing at least one common attribute.
central object	A software component that resides on a central server.
central objects merge	A process that blends a customer's modifications with the objects in a current release with objects in a new release.
central server	A computer that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers.
certificate input	See direct input.
certificate of analysis (COA)	A document that is a record of all of the testing which has been performed against an item, lot, or both, plus the test results for that item and lot.
change management	[In software development] A process that aids in controlling and tracking the evolution of software components.
change order	In PeopleSoft, an addendum to the original purchase order that reflects changes in quantities, dates, or specifications in subcontract-based purchasing. A change order is typically accompanied by a formal notification.
chargeback	A receipt application method that generates an invoice for a disputed amount or for the difference of an unpaid receipt.
chart	EnterpriseOne term for tables of information that appear on forms in the software. See forms.
check-in location	The directory structure location for the package and its set of replicated objects. This location is usually \\deploymentserver\release\path_code\package\packagename. The subdirectories under this path are where the central C components (source, include, object, library, and DLL file) for business functions are stored.

checksum value	A computed value that depends on the contents of a block of data, and that is transmitted or stored with the data to detect whether errors have occurred in the transmission or storage.
class	[In object-oriented programming] A category of objects that share the same characteristics.
clean cargo	Term that refers to cargoes of gasoline and other refined products. See also dirty cargo.
client access	The ability to access data on a server from a client machine.
client machine	Any machine that is connected to a network and that exchanges data with a server.
client workstation	A network computer that runs user application software and is able to request data from a server.
ClieOp03	In the Netherlands, the euro-compliant uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
ClieOp2	In the Netherlands, the uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
cluster	Two or more computers that are grouped together in such a way that they behave like a single computer.
co-existence	A condition where two or more applications or application suites access one or more of the same database tables within the same enterprise.
cold test	The temperature at which oil becomes solid. Generally considered to be 5 degrees F lower than the pour point.
commitment	The number of items that are reserved to fill demand.
common object request broker architecture	An object request broker standard that is endorsed by the Object Management Group.
compa-ratio	An employee's salary divided by the midpoint amount for the employee's pay grade.
component changeout	See component swap.
component object model (COM)	A specification developed by Microsoft for building software components that can be assembled into programs or add functionality to existing programs running on Microsoft Windows platforms. COM components can be written in a variety of languages, although most are written in C++, and can be unplugged from a program at runtime without having to recompile the program.

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. A component swap can also mean the substitution of one parent or component item for another in its associated bill of material.
conference room pilot environment	An EnterpriseOne environment that is used as a staging environment for production data, which includes constants and masters tables such as company constants, fiscal date patterns, and item master. Use this environment along with the test environment to verify that your configuration works before you release changes to end-users.
configurable network computing (CNC)	An application architecture that allows interactive and batch applications that are composed of a single code base to run across a TCP/IP network of multiple server platforms and SQL databases. The applications consist of re-usable business functions and associated data that can be configured across the network dynamically. The overall objective for businesses is to provide a future-proof environment that enables them to change organizational structures, business processes, and technologies independently of each other.
configurable processing engine	Handles all "batch" processes, including reporting, Electronic Data Exchange (EDIt) transactions, and data duplication and transformation (for data warehousing). This ability does not mean that it exists only on the server; it can be configured to run on desktop machines (Windows 95 and NT Workstation) as well.
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 by using Boolean logic, and then translated into the components and routing steps that are required to produce the product. The resulting configuration is also priced and costed, based on the defined characteristics.
configured item segment	A characteristic of a configured item that is defined during sales order entry. For example, a customer might specify a type of computer hard drive by stating the number of megabytes of the hard drive, rather than a part number.
consuming location	The point in the manufacturing routing where a component or subassembly is used in the production process. In kanban processing, the location where the kanban container materials are used in the manufacturing process and the kanban is checked out for replenishment.
contra/clearing account	A G/L account used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations.
contribution to profit	Selling price of an item minus its variable costs.
control table	A table that controls the program flow or plays a major part in program control.
control table workbench	During the Installation Workbench process, Control Table Workbench runs the batch applications for the planned merges that update the data dictionary, user defined codes, menus, and user overrides tables.

control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
cost assignment	Allocating resources to activities or cost objects.
cost component	An element of an item's cost—for example, material, labor, or overhead.
cost object	Any customer, product, service, contract, project, or other work unit for which you need a separate cost measurement.
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.
costing elements	The individual classes of added value or conversion costs. These elements are typically materials, such as raw and packaging; labor and machine costs; and overhead, such as fixed and variable. Each corporation defines the necessary detail of product costs by defining and tracking cost categories and subcategories.
credit memo	A negative amount that is used to correct a customer's statement when he or she is overcharged.
credit notice	The physical document that is used to communicate the circumstances and value of a credit order.
credit order	A credit order is used to reflect products or equipment that is received or returned so that it can be viewed as a sales order with negative amounts. Credit orders usually add the product back into inventory. This process is linked with delivery confirmation.
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.
crude oil assay	A procedure for determining the distillation curve and quality characteristics of a crude oil.
cumulative update	A version of software that includes fixes and enhancements that have been made since the last release or update.
currency relationships	When converting amounts from one currency to another, the currency relationship defines the from currency and the to currency in PeopleSoft software. For example, to convert amounts from German marks to the euro, you first define a currency relationship between those two currencies.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. It can be used, for example, when many currencies must be restated into a single currency for consolidated reporting.

current cost	The cost that is 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.
customer pricing rules	In Procurement, the inventory pricing rules that are assigned to a supplier. In Sales, inventory pricing rules that are assigned to a customer.
D.A.S. 2 Reporting (DAS 2 or DADS 1)	In France, the name of the official form on which a business must declare fees and other forms of remuneration that were paid during the fiscal year.
data dictionary	A dynamic repository that is used for storing and managing a specific set of data item definitions and specifications.
data source workbench	During the Installation Workbench process, Data Source Workbench copies all of the data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System - release number data source. It also updates the Data Source Plan detail record to reflect completion.
data structure	A description of the format of records in a database such as the number of fields, valid data types, and so on.
data types	Supplemental information that is attached to a company or business unit. Narrative type contains free-form text. Code type contains dates, amounts, and so on.
datagram	A self-contained packet of information that is forwarded by routers, based on their address and the routing table information.
date pattern	A period of time that is set for each period in standard and 52-period accounting and forecasting.
DCE	See distributed computing environment.
DEB	See déclaration d’echange de biens.
debit memo	In Accounts Payable, a voucher that is entered with a negative amount. Enter this type of voucher when a supplier sends you a credit so that you can apply the amount to open vouchers when you issue payment to the supplier.
debit memo	A form that is issued by a customer, requesting an adjustment of the amount, which is owed to the supplier.
debit statement	A list of debit balances.
de-blend	When blend off does not result in a product that is acceptable to customers. The further processing of product to adjust specific physical and chemical properties to within specification ranges. See also blend off.
déclaration d’echange de biens (DEB)	The French term that is used for the Intrastat report.
delayed billing	The invoicing process is delayed until the end of a designated period.

delta load	A batch process that is used to compare and update records between specified environments.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail	The specific information that makes up a record or transaction. Contrast with summary.
detail information	Information that primarily relates to individual lines in a sales or purchase order.
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate, store-and-forward.
direct input	The system calculates the net units when you enter gross volume, temperature, and gravity or density. This data is generally entered during product receiving from the certificate that is prepared by an independent inspector.
direct ship orders	A purchase order that is issued to a third-party supplier who designates the destination as the customer. A direct ship sales order is also created for the customer. Direct ship orders occur when a product is not available from a company-owned or company-operated source, so the system creates an order to ship the product from a third-party source directly to the customer. Sometimes referred to as a drop ship or third-party supply.
direct usage	Consumption of resources that are attributable to specific production runs because the resources were directly issued to the schedule/order.
director	An EnterpriseOne user interface that guides a user interactively through an EnterpriseOne process.
dirty cargo	Term that refers to crude oil cargoes or other non-refined petroleum cargoes. See also clean cargo.
dispatch planning	Efficient planning and scheduling of product deliveries. Considerations include: Dispatch groups Scheduled delivery date Scheduled delivery time Preferred delivery date Preferred delivery time Average delivery time for that geographical location Available resources Special equipment requirements at the product’s source or destination.

displacement days	The number of days that are calculated from today's date by which you group vouchers for payment. For example, if today's date is March 10 and you specify three displacement days, the system includes vouchers with a due date through March 13 in the payment group. Contrast with pay-through date.
display sequence	A number that the system uses to re-order a group of records on the form.
distributed computing environment (DCE)	A set of integrated software services that allows software which is running on multiple computers to perform seamless and transparently to the end-users. DCE provides security, directory, time, remote procedure calls, and files across computers running on a network.
distributed data processing	Processing in which some of the functions are performed across two or more linked facilities or systems.
distributed database management system (DDBMS)	A system for distributing a database and its control system across many geographically dispersed machines.
do not translate (DNT)	A type of data source that must exist on the AS/400 because of BLOB restrictions.
double-byte character set (DBCS)	A method of representing some characters by using one byte and other characters by using two bytes. Double-byte character sets are necessary to represent some characters in the Japanese, Korean, and Chinese languages.
downgrade profile	A statement of the hierarchy of allowable downgrades. Includes substitutions of items, and meeting tighter specifications for those products with wider or overlapping specification ranges.
DTA	Datenträgeraustausch. A Swiss payment format that is required by Telekurs (Payserv).
dual pricing	To provide prices for goods and services in two currencies. During the euro transition period, dual pricing between the euro and Economic and Monetary Union (EMU) member currencies is encouraged.
dynamic link library (DLL)	A set of program modules that are designed to be invoked from executable files when the executable files are run, without having to be linked to the executable files. They typically contain commonly used functions.
dynamic partitioning	The ability to dynamically distribute logic or data to multiple tiers in a client/server architecture.
economy of scale	A phenomenon whereby larger volumes of production reduce unit cost by distributing fixed costs over a larger quantity. Variable costs are constant; but fixed costs per unit are reduced, thereby reducing total unit cost.
edit mode	A processing mode or condition where the user can alter the information in a form.
edit rule	A method that is used for formatting user entries, validating user entries, or both, against a predefined rule or set of rules.

embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field that is based on a processing option value, or calling a business function. Contrast with business function event rule. See also event rule.
employee work center	A central location for sending and receiving all EnterpriseOne messages (system and user-generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages. With respect to workflow, the Message Center is MAPI compliant and supports drag-and-drop work reassignment, escalation, forward and reply, and workflow monitoring. All messages from the message center can be viewed through EnterpriseOne messages or Microsoft Exchange.
Emulator	An item of software or firmware that allows one device to imitate the functioning of another.
encapsulation	The ability to confine access to and manipulation of data within an object to the procedures that contribute to the definition of that object.
engineering change order (ECO)	A work order document that is used to implement and track changes to items and resulting assemblies. The document can include changes in design, quantity of items required, and the assembly or production process.
enhanced analysis database	A database containing a subset of operational data. The data on the enhanced analysis database performs calculations and provides summary data to speed generation of reports and query response times. This solution is appropriate when external data must be added to source data, or when historical data is necessary for trend analysis or regulatory reporting. See also duplicated database, enterprise data warehouse.
enterprise server	A computer containing programs that collectively serve the needs of an enterprise rather than a single user, department, or specialized application.
EnterpriseOne object	A re-usable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects. See also object.
EnterpriseOne process	Allows EnterpriseOne clients and servers to handle processing requests and execute transactions. A client runs one process, and servers can have multiple instances of a process. EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes do not have to wait if the server is particularly busy.
EnterpriseOne web development computer	A standard EnterpriseOne Windows developer computer with the additional components installed: Sun’s JDK 1.1. JFC (0.5.1). Generator Package with Generator.Java and JDECOM.dll. R2 with interpretive and application controls/form.

environment workbench	During the Installation Workbench process, Environment Workbench copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System release number data source. It also updates the Environment Plan detail record to reflect completion.
equivalent fuel	A barrel of equivalent fuel supplies six million BTUs of heat. Fuel gas quantities are usually calculated as equivalent fuel barrels in economic calculations for refinery operations.
escalation monitor	A batch process that monitors pending requests or activities, and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.
ESR	Einzahlungsschein mit Referenznummer. A pay slip with a reference number.
event rule	[In EnterpriseOne] A logic statement that instructs the system to perform one or more operations that are based on an activity that can occur in a specific application, such as entering a form or exiting a field.
exit bar	[In EnterpriseOne] The tall pane with icons in the left portion of many EnterpriseOne program windows.
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.
fast path	[In EnterpriseOne] A command prompt that allows the user to move quickly among menus and applications by using specific commands.
file handle	A temporary reference (typically a number) that is assigned to a file which has been opened by the operating system and is used throughout the session to access the file.
file server	A computer that stores files to be accessed by other computers on the network.
find/browse	A type of form used to: Search, view, and select multiple records in a detail area. Delete records. Exit to another form. Serve as an entry point for most applications.
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.
fiscal date pattern	A representation of the beginning date for the fiscal year and the ending date for each period in that year.
fix/inspect	A type of form used to view, add, or modify existing records. A fix/inspect form has no detail area.

fixed quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a fixed quantity relationship to its parent, the amount of the component does not change when the software calculates parts list requirements for different work order quantities. Contrast with variable quantity.
flexible account numbers	The format of account numbers for journal entries. The format that you set up must be the three segments: Business unit. Object. Subsidiary.
form design aid (FDA)	The EnterpriseOne GUI development tool for building interactive applications and forms.
form exit	[In EnterpriseOne] An option that is available as a button on the Form Exit bar or as a selection in the Form menu. It allows users to open an interconnected form.
form interconnection	Allows one form to access and pass data to another form. Form interconnections can be attached to any event; however, they are normally used when a button is clicked.
form type	The following form types are available in EnterpriseOne: Find/browse. Fix/inspect. Header detail. Headerless detail. Message. Parent/child. Search/select.
form-to-form call	A request by a form for data or functionality from one of the connected forms.
framework	[In object-oriented systems] A set of object classes that provide a collection of related functions for a user or piece of software.
frozen cost	The cost of an item, operation, or process after the frozen update program is run; 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.
globally unique identifier (GUI)	A 16-byte code in the Component Object Model that identifies an interface to an object across all computers and networks.
handle	[In programming] A pointer that contains the address of another pointer, which, in turn, contains the address of the desired object.

hard commitment	The number of items that are reserved for a sales order, work order, or both, from a specific location, lot, or both.
hard error	An error that cannot be corrected by a given error detection and correction system.
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.
header information	Information that pertains to the entire order.
hover help	A help function that provides contextual information or instructions when a cursor moves over a particular part of the interface element for a predefined amount of time.
ICMS	Imposto sobre circulação de mercadoria e servicos. In Brazil, a state tax that is applied to the movement of merchandise and some services.
ICMS Substituto	Imposto sobre circulacao de mercadoria e servicos substituto. In Brazil, the ICMS tax that is charged on interstate transactions, or on special products and clients.
ICMS Substituto-Markup	See imposto sobre circulação de mercadoria e servicos substituto-markup.
imposto de renda (IR)	Brazilian income tax.
imposto sobre produtos industrializados	In Brazil, a federal tax that applies to manufactured goods (domestic and imported).
imposto sobre services (ISS)	In Brazil, tax on services.
inbound document	A document that is received from a trading partner using Electronic Data Interface (EDI). This document is also referred to as an inbound transaction.
indented tracing	Tracking all lot numbers of intermediates and ingredients that are consumed in the manufacture of a given lot of product, down through all levels of the bill of material, recipe, or formula.
indexed allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a fixed percentage.
indirect measurement	Determining the quantity on-hand by: Measuring the storage vessels and calculating the content's balance quantity. or Theoretically calculating consumption of ingredients and deducting them from the on-hand balance.
indirect usage	Determining what should have been used by multiplying receipt quantity of the parent times the quantity per statement in the formula, recipe, or bill of material. This transaction typically affects both consumption on schedule as well as issue from on-hand balances.

in-process rework	Recycling a semi processed product that does not meet acceptable standards. Further processing takes the product out of a given operation and sends it back to the beginning of that operation or a previous operation (for example, unreacted materials). Rework that is detected prior to receipt of finished goods and corrected during the same schedule run.
INPS withholding tax	Instituto Nazionale di Previdenza Sociale withholding tax. In Italy, a 12% social security withholding tax that is imposed on payments to certain types of contractors. This tax is paid directly to the Italian social security office.
inscrição estadual	ICMS tax ID. In Brazil, the state tax ID.
inscrição municipal	ISS tax ID. In Brazil, the municipal tax ID.
integrated toolset	Unique to EnterpriseOne is an industrial-strength toolset that is embedded in the already comprehensive business applications. This toolset is the same toolset that is used by PeopleSoft to build EnterpriseOne interactive and batch applications. Much more than a development environment, however, the EnterpriseOne integrated toolset handles reporting and other batch processes, change management, and basic data warehousing facilities.
integrity test	A process that is used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interbranch sales order	A sales order that is used for transactions between branch/plants other than the selling branch/plant.
Interoperability	The ability of different computer systems, networks, operating systems, and applications to work together and share information.
inventory pricing rule	A discount method that is used for purchases from suppliers and sales to customers. The method is based on effectivity dates, up-to quantities, and a factor by which you can mark up or discount the price or cost.
inventory turn	The number of times that the inventory cycles, or turns over, during the year. A frequently used method to compute inventory turnover is to divide the annual costs of sales by the average inventory level.
invoice	An itemized list of goods that are shipped or services that are rendered, stating quantities, prices, fees, shipping charges, and so on. Companies often have their invoices mailed to a different address than where they ship products. In such cases, the bill-to address differs from the ship-to address.
IP	See imposto sobre produtos industrializados.
IR	See imposto de renda.
IServer Service	Developed by PeopleSoft, this Internet server service resides on the Web server and is used to speed up delivery of the Java class files from the database to the client.
ISS	See imposto sobre servicos.

jargon	An alternate data dictionary item description that EnterpriseOne or PeopleSoft World displays, based on the product code of the current object.
java application server	A component-based server that resides in the middle-tier of a server-centric architecture and provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that allows heterogeneous servers to access each other's data.
jde.ini	A PeopleSoft file (or member for AS/400) that provides the runtime settings that are required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine that is running EnterpriseOne, including workstations and servers.
JDE.LOG	The main diagnostic log file of EnterpriseOne. Always located in the root directory on the primary drive. Contains status and error messages from the startup and operation of EnterpriseOne.
JDEBASE Database Middleware	PeopleSoft proprietary database middleware package that provides two primary benefits: 1. Platform-independent APIs for multidatabase access. These APIs are used in two ways: a. By the interactive and batch engines to dynamically generate platform-specific SQL, depending on the data source request. b. As open APIs for advanced C business function writing. These APIs are then used by the engines to dynamically generate platform-specific SQL. 2. Client-to-server and server-to-server database access. To accomplish this access, EnterpriseOne is integrated with a variety of third-party database drivers, such as Client Access 400 and open database connectivity (ODBC).
JDECallObject	An application programming interface that is used by business functions to invoke other business functions.
JDEIPC	Communications programming tools that are used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.
JDENET	PeopleSoft proprietary middleware software. JDENET is a messaging software package.
JDENET communications middleware	PeopleSoft proprietary communications middleware package for EnterpriseOne. It is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all EnterpriseOne supported platforms.
just in time installation (JITI)	EnterpriseOne's method of dynamically replicating objects from the central object location to a workstation.
just in time replication (JITR)	EnterpriseOne's method of replicating data to individual workstations. EnterpriseOne replicates new records (inserts) only at the time that the user needs the data. Changes, deletes, and updates must be replicated using Pull Replication.

Kagami	In Japan, summarized invoices that are created monthly (in most cases) to reduce the number of payment transactions.
latitude	The X coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
laytime (or layhours)	The amount of time that is allotted to a tanker at berth to complete loading or discharging cargo. This time is usually expressed in running hours, and is fixed by prior agreement between the vessel owner and the company that is chartering the vessel. Laytime is stipulated in the charter, which states exactly the total of number of hours that are granted at both loading and unloading ports, and indicates whether such time is reversible. A statement of "Seventy-Two Hours, Reversible" means that a total of 72 hours is granted overall at both ports, and any time saved at one port can be applied as a credit at the other port. For example, if the vessel uses only 32 hours instead of 36 hours to load cargo, it can apply an additional four hours to the 36 hours allotted at the discharge port. Such considerations are important for purposes of computing demurrage.
leading zeros	A series of zeros that certain facilities in PeopleSoft systems place in front of a value that is entered. This situation normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers that you enter. The result appears as 00004567.
ledger type	A code that designates a ledger which is 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 can also be stored in the CA (foreign currency) ledger type.
level break	The position in a report or text where a group of similar types of information ends and another one begins.
libro IVA	Monthly VAT report. In Italy, the term for the report that contains the detail of invoices and vouchers that were registered during each month.
line of business	A description of the nature of a company's work; also a tool to control the relationship with that customer, including product pricing.
linked service type	A service type that is associated with a primary service type. Linked service types can be 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 that 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.
livro razao	In Brazil, a general ledger report.
load balancing	The act of distributing the number of processes proportionally to all servers in a group to maximize overall performance.

location workbench	During the Installation Workbench process, Location Workbench copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.
log files	Files that track operations for a process or application. Reviewing log files is helpful for troubleshooting problems. The file extension for log files is .LOG.
logic data source	Any code that provides data during runtime.
logical compartment	One of two ways that is identified in the transportation constants to display compartments on vehicles. Logical display numbers the compartments sequentially. For example, if two vehicles are on a trip and each vehicle has three compartments, the logical display is 1,2,3,4,5,6.
logical file	A set of keys or indices that is used for direct access or ordered access to the records in a physical file. Several logical files can have different accesses to a physical.
logical shelf	A logical, not physical, location for inventory that is used to track inventory transactions in loan/borrow, or exchange agreements with other companies. See also logical warehouse.
logical warehouse	Not a physical warehouse containing actual inventory, but a means for storing and tracking information for inventory transactions in loan/borrow, or exchange agreements with other companies.
longitude	The Y coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
LSV	Lastschriftverfahren. A Swiss auto debit format that is required by Telekurs (Payserv).
mail merge	A mass-mail facility that takes names, addresses, and (sometimes) pertinent facts about recipients and merges the information into a form letter or a similarly basic document.
mailmerge workbench	[In EnterpriseOne] An application that merges Microsoft Word 6.0 (or higher) word-processing documents with EnterpriseOne records to automatically print business documents.
main fuels	Usually refers to bulk fuel products, but sometimes includes packaged products.
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 which can be performed at the same time for each piece of equipment. Sometimes referred to as maintenance loop.

maintenance work order	In PeopleSoft EnterpriseOne systems, a term that is 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.
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.
mapping	A set of instructions that describes how one data structure passes data to another.
master business function	An interactive master file that serves as a central location for adding, changing, and updating information in a database.
master business function	A central system location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. Master business functions ensure uniform processing according to guidelines that you establish.
master table	A database table that is 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.
matching document	A document that is associated with an original document to complete or change a transaction. For example, a receipt is the matching document of an invoice.
media object	An electronic or digital representation of an object.
media storage objects	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
memory violation	An error that occurs as the result of a memory leak.
menu selection	An option on a menu that initiates a software function directly.
message center	A central location for sending and receiving all EnterpriseOne messages (system- and user-generated), regardless of the originating application or user.
messaging application programming interface (MAPI)	An architecture that defines the components of a messaging system and how they behave. It also defines the interface between the messaging system and the components.
metal content	A series of properties of a blended product that help to determine its suitability for a prescribed purpose.
metals management	The process of maintaining information about the location and status of durable product containers such as liquid petroleum gas (LPG) cylinders.
mobile inventory	Inventory that is transferred from a depot to a barge or truck for milk-run deliveries.

modal	A restrictive or limiting interaction that is created by a given condition of operation. Modal often describes a secondary window that restricts a user's interaction with other windows. A secondary window can be modal with respect to its primary window or to the entire system. A modal dialog box must be closed by the user before the application continues.
model work order	For scheduled preventive maintenance or for a condition-based alert, a model work order functions as a template for the creation of other work orders. You can assign model work orders to service types and condition-based alerts. When the service type comes due or the alert is generated, the system automatically generates a work order that is based on information from the model work order.
modeless	Not restricting or limiting interaction. Modeless often describes a secondary window that does not restrict a user's interaction with other windows. A modeless dialog box stays on the screen and is available for use at any time, but also permits other user activities.
multiple stocking locations	Authorized storage locations for the same item number at locations, in addition to the primary stocking location.
multitier architecture	A client/server architecture that allows multiple levels of processing. A tier defines the number of computers that can be used to complete some defined task.
named event rules (NER)	Also called business function event rules. Encapsulated, re-usable business logic that is created by using event rules, rather than C programming.
national language support (NLS)	Mechanisms that are provided to facilitate internationalization of both system and application user interfaces.
natureza da operação	Transaction nature. In Brazil, a code that classifies the type of commercial transaction to conform to the fiscal legislation.
negative pay item	An entry in an account that indicates a prepayment. For example, you might prepay a supplier before goods are sent or prepay an employee's forecasted expenses for a business trip. The system stores these pending entries, assigning them a minus quantity as debit amounts in a designated expense account. After the prepaid goods are received or the employee submits an expense report, entering the actual voucher clears all of the negative pay items by processing them as regular pay items. Note that a negative pay item can also result from entering a debit memo (A/P) or a credit memo (A/R).
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 status	The next step in the payment process for payment control groups. The next status can be either WRT (write) or UPD (update).
node	A termination point for two or more communications links. A node can serve as the control location for forwarding data among the elements of a network or multiple networks, as well as performing other networking and, in some cases, local processing.

non-inventory items	See non-stock items.
non-list price	A price for bulk products that is determined by its own algorithms, such as a rolling average or commodity price plus.
non-prime product	A manufactured product with revenue potential that is less than the product planned for, or scheduled to be produced.
non-stock items	Items that the system does not account for as part of the inventory. For example, office supplies, or packaging materials can be non-stock items.
nota fiscal	In Brazil, a legal document that must accompany all commercial transactions.
nota fiscal fatura	In Brazil, a nota fiscal and invoice information.
notula	In Italy, the process whereby a business does not recognize value added tax until the payment of a voucher.
object configuration manager (OCM)	EnterpriseOne's object request broker and the control center for the runtime environment. It keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, the Object Configuration Manager directs access to it by using defaults and overrides for a given environment and user.
object embedding	When an object is embedded in another document, an association is maintained between the object and the application that created it; however, any changes made to the object are also only kept in the compound document. See also object linking.
object librarian	A repository of all versions, applications, and business functions that are re-usable in building applications.
object linking	When an object is linked to another document, a reference is created with the file in which the object is stored, as well as with the application that created it. When the object is modified, either from the compound document or directly through the file in which it is saved, the change is reflected in that application as well as anywhere it has been linked. See also object embedding.
object linking and embedding (OLE)	A technology for transferring and sharing information among applications by allowing the integration of objects from diverse applications, such as graphics, charts, spreadsheets, text, or an audio clip from a sound program. OLE is a compound document standard that was developed by Microsoft Corporation. It enables you to create objects with one application, and then link or embed them in a second application. Embedded objects retain their original format and links to the application that created them. See also object embedding, object linking.
object management workbench (OMW)	The change management system that is used for EnterpriseOne development.

object-based technology (OBT)	A technology that supports some of the main principles of object-oriented technology: Classes. Polymorphism.I Inheritance. Encapsulation.
object-oriented technology (OOT)	Brings software development past procedural programming into a world of re-usable programming that simplifies development of applications. Object orientation is based on the following principles: Classes. Polymorphism.I Inheritance. Encapsulation.
offsetting account	An account that reduces the amount of another account to provide a net balance. For example, a credit of 200 to a cash account might have an offsetting entry of 200 to an A/P Trade (liability) account.
open database connectivity (ODBC)	Defines a standard interface for different technologies to process data between applications and different data sources. The ODBC interface comprises set of function calls, methods of connectivity, and representation of data types that define access to data sources.
open systems interconnection (OSI)	The OSI model was developed by the International Standards Organization (ISO) in the early 1980s. It defines protocols and standards for the interconnection of computers and network equipment.
order detail line	A part of an order that contains transaction information about a service or item being purchased or sold, such as quantity, cost, price, and so on.
order hold	A flag that stops the processing of an order because it has exceeded the credit or budget limit, or has another problem.
order-based pricing	Pricing strategy that grants reductions in price to a customer. It is based upon the contents and relative size (volume or value) of the order as a whole.
outbound document	A document that is sent to a trading partner using EDI. This term is also referred to as an outbound transaction.

outturn	The quantity of oil that is actually received into a buyer's storage tanks when a vessel is unloaded. For various reasons (vaporization, clingage to vessel tank walls, and so on), the amount of a product pumped into shore tankage at unloading is often less than the quantity originally loaded onto the vessel, as certified by the Bill of Lading. Under a delivered or CIF outturn transaction, the buyer pays only for the barrels actually "turned out" by the vessel into storage. When a buyer is paying CIF Bill of Lading figures, a loss of 0.5% of total cargo volume is considered normal. Losses in excess of 0.5%, however, are either chargeable to the seller or are covered by specialized insurance that covers partial, as well as total, loss of the cargo.
overhead	In the distillation process, that portion of the charge that leaves the top of the distillation column as vapor. This definition is strictly as it relates to ECS.
override conversion method	A method of calculating exchange rates that is set up between two specific currencies. For those specific currencies, this method overrides the conversion method in General Accounting Constants and does not allow inverse rates to be used when calculating currency amounts.
package / package build	A collection of software that is grouped into a single entity for modular installation. EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where the installation program can find them on the deployment server. It is a point-in-time "snapshot" of the central objects on the deployment server.
package location	The directory structure location for the package and its set of replicated objects. This location is usually \\deployment server\release\path_code\package\ package name. The replicated objects for the package are placed in the subdirectories under this path. This location is also where the package is built or stored.
package workbench	During the Installation Workbench process, Package Workbench transfers the package information tables from the Planner data source to the System - release number data source. It also updates the Package Plan detail record to reflect completion.
packaged products	Products that, by their nature, must be delivered to the customer in containers which are suitable for discrete consumption or resale.
pane/panel	A resizable subarea of a window that contains options, components, or other related information.
paper clip	An icon that is used to indicate that a media object is attached to a form or record.
parent/child form	A type of form that presents parent/child relationships in an application on one form: The left portion of the form presents a tree view that displays a visual representation of a parent/child relationship. The right portion of the form displays a detail area in browse mode. The detail area displays the records for the child item in the tree. The parent/child form supports drag and drop functionality.

parent/child relationship	See parent/component relationship.
parent/component relationship	1. In Capital Asset 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; its components and subassemblies include: engine, frame, seats, and windows. Sometimes referred to as parent/child relationship.
partita IVA	In Italy, a company fiscal identification number.
pass-through	A process where data is accepted from a source and forwarded directly to a target without the system or application performing any data conversion, validation, and so on.
pay on consumption	The method of postponing financial liability for component materials until you issue that material to its consuming work order or rate schedule.
payment group	A system-generated group of payments with similar information, such as a bank account. The system processes all of the payments in a payment group at the same time.
PeopleSoft database	See JDEBASE Database Middleware.
performance tuning	The adjustments that are made for a more efficient, reliable, and fast program.
persistent object	An object that continues to exist and retains its data beyond the duration of the process that creates it.
pervasive device	A type of intelligent and portable device that provides a user with the ability to receive and gather information anytime, from anywhere.
planning family	A means of grouping end items that have similarity of design or manufacture.
plug-in	A small program that plugs into a larger application to provide added functionality or enhance the main application.
polymorphism	A principle of object-oriented technology in which a single mnemonic name can be used to perform similar operations on software objects of different types.
portal	A Web site or service that is a starting point and frequent gateway to a broad array of on-line resources and services.
Postfinance	A subsidiary of the Swiss postal service. Postfinance provides some banking services.

potency	Identifies the percent of an item in a given solution. For example, you can use an 80% potent solution in a work order that calls for 100% potent solution, but you would use 25% more, in terms of quantity, to meet the requirement (100 / 80 = 1.25).
preference profile	The ability to define default values for specified fields for a user defined hierarchy of items, item groups, customers, and customer groups. In Quality Management setup, this method links test and specification testing criteria to specific items, item groups, customers, or customer groups.
preflush	A work order inventory technique in which you deduct (relieve) materials from inventory when the parts list is attached to the work order or rate schedule.
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 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 of the 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.
pristine environment	An EnterpriseOne environment that is used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so you can compare pristine objects that you modify.
processing option	A data structure that allows users to supply parameters that regulate the execution of a batch program or report.
product data management (PDM)	In PeopleSoft EnterpriseOne software, the system that enables a business to organize and maintain information about each item which it manufactures. Features of this system, such as bills of material, work centers, and routings, define the relationships among parents and 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 line	A group of products with similarity in manufacturing procedures, marketing characteristics, or specifications that allow them to be aggregated for planning; marketing; and, occasionally, costing.
product/process definition	A combination of bill of material (recipe, formula, or both) and routing (process list). Organized into tasks with a statement of required consumed resources and produced resources.
production environment	An EnterpriseOne environment in which users operate EnterpriseOne software.

program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or diskettes.
project	[In EnterpriseOne] A virtual container for objects being developed in Object Management Workbench.
projected cost	The target expenditure in added value for material, labor, and so on, during manufacture. See also standard cost.
promotion path	The designated path for advancing objects or projects in a workflow.
protocollo	See registration number.
PST	Provincial sales tax. A tax that is assessed by individual provinces in Canada.
published table	Also called a "Master" table, this is the central copy to be replicated to other machines and resides on the "publisher" machine. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers that use EnterpriseOne's data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the Data Replication Pending Change Notification table (F98DRPCN).
query by example (QBE)	Located at the top of a detail area, this area is used to search for data to display in the detail area.
rate scheduling	A method of scheduling product or manufacturing families, or both. Also a technique to determine run times and quantities of each item within the family to produce enough of each individual product to satisfy demand until the family can be scheduled again.
rate type	For currency exchange transactions, the rate type distinguishes different types of exchange rates. For example, you can use both period average and period-end rates, distinguishing them by rate type.
real-time	Pertaining to information processing that returns a result so rapidly that the interaction appears to be instantaneous.
receipt routing	A series of steps that is used to track and move items within the receipt process. The steps might include in-transit, dock, staging area, inspection, and stock.
referential integrity	Ensures that a parent record cannot be deleted from the database when a child record for exists.

regenerable	Source code for EnterpriseOne business functions can be regenerated from specifications (business function names). Regeneration occurs whenever an application is recompiled, either for a new platform or when new functionality is added.
register types and classes	In Italian VAT Summary Reporting, the classification of VAT transactions.
relationship	Links tables together and facilitates joining business views for use in an application or report. Relationships that are created are based on indexes.
rélevé d'identité bancaire (RIB)	In France, the term that indicates the bank transit code, account number, and check digit that are used to validate the bank transit code and account number. The bank transit code consists of the bank code and agency code. The account number is alphanumeric and can be as many as 11 characters. PeopleSoft supplies a validation routine to ensure RIB key correctness.
remessa	In Brazil, the remit process for A/R.
render	To include external data in displayed content through a linking mechanism.
repasse	In Brazil, a discount of the ICMS tax for interstate transactions. It is the adjustment between the interstate and the intrastate ICMS tax rates.
replenishment point	The location on or near the production line where additional components or subassemblies are to be delivered.
replication server	A server that is responsible for replicating central objects to client machines.
report design aid (RDA)	The EnterpriseOne GUI tool for operating, modifying, and copying report batch applications.
repost	In Sales, the process of clearing all commitments from locations and restoring commitments, based on quantities from the Sales Order Detail table (F4211).
resident	Pertaining to computer programs or data while they remain on a particular storage device.
retorno	In Brazil, the receipt process for A/R.
RIB	See rélevé d'identité bancaire.
ricevute bancarie (RiBa)	In Italy, the term for accounts receivable drafts.
riepilogo IVA	Summary VAT monthly report. In Italy, the term for the report that shows the total amount of VAT credit and debit.
ritenuta d'acconto	In Italy, the term for standard withholding tax.
rollback	[In database management] A feature or command that undoes changes in database transactions of one or more records.
rollup	See cost rollup.

row exit	[In EnterpriseOne] An application shortcut, available as a button on the Row Exit bar or as a menu selection, that allows users to open a form that is related to the highlighted grid record.
runtime	The period of time when a program or process is running.
SAD	The German name for a Swiss payment format that is accepted by Postfinance.
SAR	See software action request.
scalability	The ability of software, architecture, hardware, or a network to support software as it grows in size or resource requirements.
scripts	A collection of SQL statements that perform a specific task.
scrub	To remove unnecessary or unwanted characters from a string.
search/select	A type of form that is used to search for a value and return it to the calling field.
selection	Found on PeopleSoft menus, selections represent functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
serialize	To convert a software object into a stream of bytes to store on a disk or transfer across a network.
server map	The server view of the object configuration mapping.
server workbench	During the Installation Workbench process, Server Workbench copies the server configuration files from the Planner data source to the System release number data source. It also updates the Server Plan detail record to reflect completion.
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 that is represented by the service type becomes necessary.
servlet	A [small] program that extends the functionality of a Web server by generating dynamic content and interacting with Web clients by using a request-response paradigm.
share path	The network node under which one or more servers or objects reside.
shop floor management	A system that uses data from multiple system codes to help develop, execute, and manage work orders and rate schedules in the enterprise.
silent mode	A method for installing or running a program that does not require any user intervention.

silent post	A type of post that occurs in the background without the knowledge of the user.
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-byte character set (SBCS)	An encoding scheme in which each alphabetic character is represented by one byte. Most Western languages, such as English, can be represented by using a single-byte character set.
single-level tracking	Finding all immediate parents where a specific lot has been used (consumed).
single-voyage (spot) charter	An agreement for a single voyage between two ports. The payment is made on the basis of tons of product delivered. The owner of the vessel is responsible for all expenses.
slimer	A script that changes data in a table directly without going through a regular database interface.
smart field	A data dictionary item with an attached business function for use in the Report Design Aid application.
SOC	The Italian term for a Swiss payment format that is accepted by Postfinance.
soft commitment	The number of items that is reserved for sales orders or work orders in the primary units of measure.
soft error	An error from which an operating system or program is able to recover.
software action request (SAR)	An entry in the AS/400 database that is used for requesting modifications to PeopleSoft software.
SOG	The French term for a Swiss payment format that is accepted by Postfinance.
source directory	The path code to the business function source files belonging to the shared library that is created on the enterprise server.
special period/year	The date that determines the source balances for an allocation.
specification merge	The Specification merge is comprised of three merges: Object Librarian merge (via the Object Management Workbench). Versions List merge. Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification table merge workbench	During the Installation Workbench process, Specification Table Merge Workbench runs the batch applications that update the specification tables.

specifications	A complete description of an EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
spot charter	See single-voyage charter.
spot rates	An exchange rate that is entered at the transaction level. Spot rates are not used on transactions between two EMU member currencies because exchange rates are irrevocably fixed to the euro.
stamp tax	In Japan, a tax that is imposed on drafts payable, receipts over 30000 Japanese yen, and all contracts. The party that issues any of the above documents is responsible for this tax.
standalone	Operating or capable of operating independently of certain other components of a computer system.
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 that are determined before production. For management control purposes, the system compares standard costs to actual costs and computes variances.
subprocess	A process that is triggered by and is part of a larger process, and that generally consists of activities.
subscriber table	The Subscriber table (F98DRSUB), which is stored on the Publisher Server with the Data Replication Publisher table (F98DRPUB), that identifies all of the subscriber machines for each published table.
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 which is stored in certain tables. Contrast with detail.
super backflush	To create backflush transactions for material, labor, or both, against a work order at predefined pay points in the routing. By doing so, you can relieve inventory and account for labor amounts at strategic points throughout the manufacturing process.
supersession	Specification that a new product is replacing an active product on a specified effective date.
supplemental data	Additional types of data for customers and suppliers. You can enter supplemental data for information such as notes, comments, plans, or other information that you want in a customer or supplier record. The system maintains this data in generic databases, separate from the standard master tables (Customer Master, Supplier Master, and Address Book Master).

supplying location	The location from which inventory is transferred once quantities of the item on the production line have been depleted. In kanban processing, the supplying location is the inventory location from which materials are transferred to the consuming location when the containers are replenished.
system code	A numeric or alphanumeric designation that identifies a specific system in EnterpriseOne software.
system function	[In EnterpriseOne] A named set of pre-packaged, re-usable instructions that can be called from event rules.
table access management (TAM)	The EnterpriseOne component that handles the storage and retrieval of user defined data. TAM stores information such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
table conversion workbench	During the Installation Workbench process, Table Conversion Workbench runs the table conversions that change the technical and application tables to the format for the new release of EnterpriseOne. It also updates the Table Conversions and Controls detail records to reflect completion.
table design aid (TDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing database tables.
table event rules	Use table event rules to attach database triggers (or programs) that automatically run whenever an action occurs against the table. An action against a table is referred to as an event. When you create an EnterpriseOne database trigger, you must first determine which event will activate the trigger. Then, use Event Rules Design to create the trigger. Although EnterpriseOne allows event rules to be attached to application events, this functionality is application-specific. Table event rules provide embedded logic at the table level.
table handle	A pointer into a table that indicates a particular row.
table space	[In relational database management systems] An abstract collection of containers in which database objects are stored.
task	[In Solution Explorer and EnterpriseOne Menu] A user defined object that can initiate an activity, process, or procedure.
task view	A group of tasks in Solution Explorer or EnterpriseOne Menu that are arranged in a tree structure.
termo de abertura	In Brazil, opening terms for the transaction journal.
termo de encerramento	In Brazil, closing terms for the transaction journal.
three-tier processing	The task of entering, reviewing, approving, and posting batches of transactions.
three-way voucher match	The process of comparing receipt information to supplier’s invoices to create vouchers. In a three-way match, you use the receipt records, the purchase order, and the invoice to create vouchers.

threshold percentage	In Capital Asset 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.
throughput agreement	A service agreement in which a business partner agrees to store and manage product for another business partner for a specified time period. The second partner actually owns the stock that is stored in the first partner's depot, although the first partner monitors the stock level; suggests replenishments; and unloads, stores, and delivers product to the partner or its customers. The first partner charges a fee for storing and managing the product.
throughput reconciliation	Reconcile confirmed sales figures in a given period with the measured throughput, based on the meter readings. This process is designed to catch discrepancies that are due to transactions not being entered, theft, faulty meters, or some combination of these factors. This reconciliation is the first stage. See also operational reconciliation.
token	[In Object Management Workbench] A flag that is associated with each object which indicates whether you can check out the object.
tolerance range	The amount by which the taxes that you enter manually can vary from the tax that is calculated by the system.
TP monitor	Transaction Processing monitor. A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and can include programs that validate data and format terminal screens.
tracing	The act of researching a lot by going backward, to discover its origin.
tracking	The act of researching a lot by going forward, to discover where it is used.
transaction set	An electronic business transaction (EDI Standard document) composed of segments.
transclude	To include the external data in the displayed content through a linking mechanism.
transfer order	An order that is used to ship inventory between branch/plants within your company and to maintain an accurate on-hand inventory amount. An interbranch transfer order creates a purchase order for the shipping location and a sales order for the receiving location.
translation adjustment account	An optional G/L account used in currency balance restatement to record the total adjustments at a company level.
translator software	The software that converts data from an application table format to an EDI Standard Format, and from EDI Standard Format to application table format. The data is exchanged in an EDI Standard, such as ANSI ASC X12, EDIFACT, UCS, or WINS.

tree structure	A type of graphical user interface that displays objects in a hierarchy.
trigger	Allows you to attach default processing to a data item in the data dictionary. When that data item is used on an application or report, the trigger is invoked by an event which is associated with the data item. EnterpriseOne also has three visual assist triggers: Calculator. Calendar. Search form.
two-way voucher match	The process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
universal batch engine (UBE)	[In EnterpriseOne] A type of application that runs a noninteractive process.
unnormalized	Data that is a random collection of data elements with repeating record groups scattered throughout. Also see Normalized.
user overrides merge	The User Overrides merge adds new user override records into a customer's user override table.
user-defined code (UDC)	A value that a user has assigned as being a valid entry for a given or specific field.
utility	A small program that provides an addition to the capabilities which are provided by an operating system.
variable numerator allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a variable.
variable quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a variable quantity relationship to its parent, the amount of the component changes when the software calculates parts list requirements for different work order quantities. Contrast with fixed quantity.
variance	1. In Product Costing and Manufacturing Accounting, the difference between the frozen standard cost, the current cost, the planned cost, and the actual cost. 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 by using the current bill of material, routing, and overhead rates. 2. In Capital Asset Management, the difference between revenue that is generated by a piece of equipment and costs that are incurred by the equipment.
versions list merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release as well as their processing options data.
VESR	Verfahren Einzahlungsschein mit Referenznummer. The processing of an ESR pay slip with reference line through accounts receivable and accounts payable.

visual assist	Forms that can be invoked from a control to assist the user in determining what data belongs in the control.
voucher logging	The process of entering vouchers without distributing amounts to specific G/L accounts. The system initially distributes the total amount of each voucher to a G/L suspense account, where it is held until you redistribute it to the correct G/L account.
wareki date format	In Japan, a calendar format, such as Showa or Heisei. When a new emperor begins to reign, the government chooses the title of the date format and the year starts over at one. For instance, January 1, 1998, is equal to Heisei 10, January 1st.
wash down	A minor cleanup between similar product runs. Sometimes used in reference to the sanitation process of a food plant.
wchar_t	An internal type of a wide character. Used for writing portable programs for international markets.
web server	A server that sends information as requested by a browser and uses the TCP/IP set of protocols.
work order life cycle	In Capital Asset Management, the sequence of events through which a work order must pass to accurately communicate the progress of the maintenance tasks that it represents.
workfile	A system-generated file that is used for temporary data processing.
workflow	According to the Workflow Management Coalition, worlflow means “the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.”
workgroup server	A network server usually containing subsets of data that are replicated from a master network server.
WorldSoftware architecture	The broad spectrum of application design and programming technology that PeopleSoft uses to achieve uniformity, consistency, and complete integration throughout its software.
write payment	A step in processing payments. Writing payments includes printing checks, drafts, and creating a bank tape table.
write-off	A method for getting rid of inconsequential differences between amounts. For example, you can apply a receipt to an invoice and write off the difference. You can write off both overpayments and underpayments.

Z file	For store and forward (network disconnected) user, EnterpriseOne store-and-forward applications perform edits on static data and other critical information that must be valid to process an order. After the initial edits are complete, EnterpriseOne stores the transactions in work tables on the workstation. These work table are called Z files. When a network connection is established, Z files are uploaded to the enterprise server; and the transactions are edited again by a master business function. The master business function then updates the records in your transaction files.
z-process	A process that converts inbound data from an external system into an EnterpriseOne software table or converts outbound data into an interface table for an external system to access.
zusammenfassende melding	In Germany, the term for the EU Sales Listing.

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