

JD Edwards EnterpriseOne Applications
Mobile Enterprise Applications Implementation Guide
Release 9.1.x
E49447-24

November 2017

Describes the mobile enterprise applications for JD Edwards EnterpriseOne, and discusses how to set up and use the mobile applications to add, review, and update important business data from a mobile tablet or smartphone device.

JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide, Release 9.1.x

E49447-24

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Preface

Welcome to the JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide.

Audience

This document is intended for end-users and implementation teams of EnterpriseOne mobile enterprise applications.

JD Edwards EnterpriseOne Products

Customers must conform to the supported platforms for the release as detailed in the JD Edwards EnterpriseOne minimum technical requirements. In addition, JD Edwards EnterpriseOne may integrate, interface, or work in conjunction with other Oracle products. Refer to the cross-reference material in the Program Documentation at <http://www.oracle.com/us/corporate/contracts/index.html> for Program prerequisites and version cross-reference documents to assure compatibility of various Oracle products.

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Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1308615.1, or by using this link:

http://docs.oracle.com/cd/E84502_01/learnjde/home.html

To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.
> Tutorial	Indicates a link to a recording of the described feature. These recordings are in MP4 format so ensure that you have an appropriate player installed. Access to these recordings requires a valid Oracle account.

Introduction to JD Edwards EnterpriseOne Mobile Enterprise Applications

This chapter discusses these topics:

- [Section 1.1, "Prerequisite"](#)
- [Section 1.2, "Understanding Mobile Enterprise Application Basics"](#)
- [Section 1.3, "Understanding Mobile Enterprise Application User Interfaces"](#)

1.1 Prerequisite

Before using any JD Edwards EnterpriseOne mobile enterprise applications, you must first complete the required system configuration tasks.

See:

- Introduction to the AIS Server for Mobile Enterprise Applications Configuration Guide in the JD Edwards EnterpriseOne Application Interface Services Server for Mobile Enterprise Applications Configuration Guide.
- Creating an Application Interface Services (AIS) Server as a New Managed Instance in the JD Edwards EnterpriseOne Tools Server Manager Guide.

Note: The documentation for each mobile application includes a list of all the base applications in the EnterpriseOne system. To be able to use a mobile application, you must have permission to access all of the base applications listed for the mobile application.

1.2 Understanding Mobile Enterprise Application Basics

JD Edwards EnterpriseOne mobile enterprise applications offer users the ability to access and update important business data directly from a mobile tablet or smartphone device. Using Oracle's MAF (Mobile Application Framework) Mobile technology, JD Edwards EnterpriseOne has developed the following mobile applications:

Asset Lifecycle Management (ALM)

Application	Phone App	Tablet App
Condition-Based Maintenance	Yes	Yes
Create Equipment Work Orders		Yes
Equipment Work Order Time Entry	Yes	Yes
Manage Equipment	Yes	Yes
Manage My Work Orders	Yes	Yes
Manage My Work Orders Disconnected	Yes	Yes
Meter Reading		Yes
Review Team Work Orders	Yes	Yes

Customer Relationship Management (CRM)

Application	Phone App	Tablet App
Create Service Orders	Yes	
Manage Cases	Yes	
Manage Customer Equipment	Yes	Yes
Manage My Service Orders	Yes	Yes
Quick Case Entry	Yes	
Review Cases		Yes
Review Team Service Orders	Yes	Yes
Service Order Time Entry	Yes	Yes

Financial Management Solutions (FMS)

Application	Phone App	Tablet App
Contact Customer	Yes	Yes
Contact Supplier	Yes	
Customer Account	Yes	Yes
Expense Approval	Yes	Yes
Expense Entry	Yes	Yes
G/L Batch Approvals	Yes	Yes
Invoice Batch Approvals	Yes	Yes
Payment Batch Approvals	Yes	Yes
Receipt Batch Approvals	Yes	Yes
Voucher Batch Approvals	Yes	Yes

Health and Safety (HSE)

Application	Phone App	Tablet App
Incident Scoreboard	Yes	Yes

Application	Phone App	Tablet App
Report an Incident	Yes	Yes

Human Capital Management Fundamentals

Application	Phone App	Tablet App
Contact Employee	Yes	

Project Management

Application	Phone App	Tablet App
Change Request Approval	Yes	Yes
Change Request Entry	Yes	Yes
Field Progress Entry	Yes	Yes
Field Status Review	Yes	Yes
Job Progress Entry		Yes
Manage Cost Code Schedule		Yes
Project Status Review	Yes	Yes
Project Time Entry	Yes	Yes

Supply Chain Management and Manufacturing

Application	Phone App	Tablet App
Customer Order Overview	Yes	Yes
Inventory Availability	Yes	Yes
Product Price and Availability	Yes	Yes
Quote Review and Release	Yes	Yes
Sales Order Counts	Yes	Yes
Order Entry		Yes
Sales Held Order Release	Yes	Yes
Search Sales Order	Yes	Yes
Warehouse Availability		Yes

Supply Management

Application	Phone App	Tablet App
Purchase Order Approval	Yes	Yes
Requisition Self Service Approval	Yes	Yes

1.2.1 Supported Devices and Minimum Technical Requirements

Oracle supports the use of all JD Edwards EnterpriseOne mobile enterprise applications on several smartphone and tablet devices. For the latest list of supported

devices, along with the most current MTR information, see this My Oracle Support document (sign on required):

<https://support.oracle.com/epmos/faces/DocumentDisplay?id=1638204.1>

Note: This documentation uses iPhone and iPad illustrations. Typically the functionality on the iOS and Android devices is the same. In cases where the functionality differs, the documentation will discuss the differences between the two operating systems.

1.2.2 Languages in Mobile Applications

By default, all Oracle mobile applications that are built with ADF technology are deployed using English as the language. When a user launches a mobile application and signs in, the login service retrieves the user's language preference from their JD Edwards EnterpriseOne user profile. Language preference codes are stored in UDC table 01/LP.

If a translated version of the application exists for that language, the mobile device displays the application using the user's preferred language. If no translated version exists for the specified language, the mobile device displays the application in English.

Note: The login page for the application will appear in the language that is set as the default language of the mobile device, provided that there is a translated version of the application for that language. If there is no translated version in the selected language, the login page appears in English.

Currently, translated versions for all EnterpriseOne mobile applications exist for these languages:

- English
- French
- German
- Arabic
- Czech
- Chinese Simplified
- Chinese Traditional
- Danish
- Dutch
- Finnish
- Greek
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian

- Portuguese
- Polish
- Russian
- Spanish
- Turkish
- Swedish

1.2.2.1 Language Support for Business Unit and Branch Plant Searches



Several Mobile Enterprise Applications use the Business Unit Search and Branch/Plant Search screens. The search behavior of these screens is dependent upon the language preferences of the logged-on user.










These screens search for data using the same method as the Business Unit Master Search program (P0006S) in the base EnterpriseOne system. If the language preference in the user's profile is set to blank, the mobile application uses the search description entered by the mobile user to search over the Business Unit Master table (F0006). If the language preference is populated, the mobile application uses the search description entered by the mobile user to search over the Business Unit Alternative Description Master table (F0006D).








1.3 Understanding Mobile Enterprise Application User Interfaces



JD Edwards EnterpriseOne mobile enterprise applications are developed using standards-based technology. This means that all of the applications share standard user interface elements and constructs. These elements behave in the same way through all of the EnterpriseOne mobile enterprise applications. This section discusses each of these user-interface elements in detail.

Oracle recommends that users review this section before using the applications.

Mobile Application Object or Feature	Description and Usage
About Button	Tap this button to view the <i>About This Application</i> information associated with the applications. This information includes details such as the application name and version, the AIS server location, the application ID, and user login information. You access this button by tapping the Menu button.
	
Action Buttons	Tap an action button to perform an action on the current screen. Actions can include Save, Add, Delete, and other actions you want to apply to a record in an application. Action buttons typically appear in either the top navigation bar or the bottom bar of the application. This button illustrates an example of an Apply action button.
	

Mobile Application Object or Feature	Description and Usage
Action Menu Button	Tap the Action Menu button at the top right of the screen to see a list of secondary actions that can be completed. 
Add Button	Tap the Add button to create a new record. 
Clear	There are two options that can be used to clear values. One, shown here, is used to clear the values from a specific field:  The other is a Clear action button, shown below, that clears the values from all fields on the screen. 
Credit Card	Tap this button to add credit card expenses to an expense report. 
Delete Button	Tap this button to delete a selected or associated entry. 
Edit Button	Tap this button to edit a selected or associated entry. 
Filter	Tap the Filter button, shown below, to access a form that enables you to enter search filter criteria to narrow your search results. 
Legal Terms	Tap this button to read the legal terms associated with using the mobile application. You access this button by tapping the Menu button. 

Mobile Application Object or Feature	Description and Usage
Logout	<p>Tap this button to log out of the application. You access this button by tapping the menu button.</p> 
Menu	<p>The menu button, shown here, is displayed at the bottom of most screens, and enables users to log out of the application, view information about the application, or access legal terms.</p> 
Next Field	<p>The Next Field button appears when you are using the keyboard to enter data into fields on the screen. Tap this button to move to the next data-entry field on the screen.</p> 
Previous Field	<p>The Previous Field button appears when you are using the keyboard to enter data into fields on the screen. Tap this button to move to the previous data-entry field on the screen.</p> 
Refresh	<p>Many screens in the mobile applications use the standard device feature of swiping down on the screen to refresh the data.</p> <p>Some screens include a refresh button, as shown here:</p> 
Return To	<p>Use the Return To button to return to the previous screen within the application flow. The text on this button changes, depending on the name of the screen to which you will be redirected. For example, if tapping this button returns the user to the Home screen, the button text is Home. If tapping the button returns the user to the Search screen, the button text is Search, as shown here:</p> 
Tabs	<p>Tabs are used within a detail screen to enable users to see different types of data related to the selected record. Tabs are typically organized horizontally near the top of the screen. When you tap on a tab, that tab is highlighted, and the data associated with that tab is displayed below. This is an example of two tabs, with the Equipment tab selected:</p> 

Mobile Application Object or Feature	Description and Usage
Text	Tab this icon to use the texting application on your mobile device and send a message to the phone number displayed in the application. 
Visual Assist	Use the Visual Assist button, shown below, to access forms that enable users to search for valid values for the selected field. For example, you might find a Visual Assist button next to a Branch/Plant field that enables users to search for a valid branch/plant or business unit.  Note that in some cases, this button is used as a <i>Find</i> button. This typically occurs on the home screen of an application, where a user enters a value in the main header search field, and taps this button to find records that meet the search criteria.

Versioning Mobile Applications

This chapter discusses these topics:

- [Section 2.1, "Understanding Version Information for Mobile Enterprise Applications"](#)
- [Section 2.2, "Setting Up Version Information for Mobile Enterprise Applications"](#)

2.1 Understanding Version Information for Mobile Enterprise Applications

Each mobile application uses a program that defines certain information about the mobile application, and can also be used to set up versioning information. These programs begin with M, as opposed to P (for interactive programs), or R (for batch programs).

Some of these programs have processing options that must be set to control data processing for the mobile application. Processing option details are documented in the chapter for each mobile solution.

You use the Mobile Configuration program (P98950M) to set up versioning information for mobile applications. You can define which versions of the mobile application each user in your organization will access when they log into a mobile application. You can set up one default version for all users, or you can set up multiple versions for different roles or for specific users.

Note: You can not edit mobile configuration records. If you need to update a record, delete the record and enter a new record with the updated information.

2.2 Setting Up Version Information for Mobile Enterprise Applications

You must set up the version information for mobile enterprise applications in the EnterpriseOne system. You cannot complete this setup in the mobile device.

2.2.1 Forms Used to Set Up Version Information for Mobile Enterprise Applications

Form Name	Form ID	Navigation	Usage
Work With Mobile Configuration form	W98950MA	Enter P98950M in the Fast Path field, and click Enter.	Search for and select mobile configuration records, or access the form to add mobile configuration records.

Form Name	Form ID	Navigation	Usage
Mobile Configuration Revisions form	W98950MB	Click Add on the Work With Mobile Configuration form.	Add a new mobile configuration record.

2.2.2 Setting Up Version Information for Mobile Enterprise Applications

To set up version information for mobile enterprise applications:

1. Access the Mobile Configuration Revisions form.

Figure 2–1 Mobile Configuration Revisions Form

2. Complete these fields:
 - User/Role

Enter the user ID or the role that you want to assign to a specific version of a mobile application. If you want all users of the application to use the same version, enter *PUBLIC in this field.
 - Application

Enter the mobile program for which you are setting up versioning. For example, enter M42010 to set up versioning for mobile Order Entry.
 - Version

Enter the version that you want the specified user or role to use when accessing the mobile application.
3. Click OK on the Mobile Configuration Revisions form.

Logging Into Mobile Enterprise Applications

This chapter includes these topics:

- [Section 3.1, "Overview of Mobile Application Log In"](#)
- [Section 3.2, "Logging Into Mobile Enterprise Applications"](#)
- [Section 3.3, "Changing the Server Location URL"](#)

3.1 Overview of Mobile Application Log In

In order to log into a JD Edwards EnterpriseOne mobile application, the user must first download and install the application on their mobile device. After the device is installed, the user can tap the icon to open the application. The first time a user opens the application, they will be asked to enter the url for the server they need to connect to. Users should contact their system administrator for this url.

After entering a valid server url, the user will be asked to provide log in credentials. These include the following items, and are likely the same values used when logging into the base JD Edwards EnterpriseOne system:

- User Name
- Password
- Environment
- Role

Important Notes:

During mobile application system setup, the system administrator determines whether the Environment and Role fields appear for mobile users during log in. The administrator also determines whether the Single Sign On feature is enabled.

Additionally, depending on the security setup of the AIS server, users might be required to sign into a virtual private network (VPN) before they can connect their mobile applications to their organization's JD Edwards EnterpriseOne database. Contact your system administrator to determine whether you need a VPN connection to log into your mobile applications.

See the following topics for additional information:

- Introduction to This Guide in the JD Edwards EnterpriseOne Application Interface Services Server for Mobile Enterprise Applications Configuration Guide.
 - Creating an Application Interface Services (AIS) Server as a New Managed Instance in the JD Edwards EnterpriseOne Tools Server Manager Guide.
-
-

After your initial successful log in with a valid url, the application will not prompt you to enter the url again, unless the url becomes invalid. You can also change the url at any time if needed.

3.1.1 Using the Single Sign On Login Option

The Single Sign On (SSO) feature enables users of multiple JD Edwards EnterpriseOne mobile applications to log into one mobile application, and then be able to open other mobile applications without having to log in again.

To use this option, the system administrator must first have enabled the Single Sign On option on the AIS server. If the AIS option is set to enable the SSO feature, the mobile device displays the Use Single Sign On option on the Login screen.

See *Deploying and Managing the AIS Server through Server Manager* in the AIS Server Configuration Guide for additional information.

Figure 3–1 Use Single Sign On Option

The screenshot shows a mobile application login interface. At the top, it displays 'Carrier', signal strength, and the time '1:23 PM'. The Oracle logo and 'JD EDWARDS' are centered. The form includes the following fields and options:

- User Name: [Empty text box]
- Password: [Empty text box]
- Environment: [Text box containing 'JDV910']
- Role: [Dropdown menu showing '*ALL']
- Use Single Sign On: [Checked checkbox]
- Login: [Blue button]

A hamburger menu icon is located in the bottom left corner.

This option must be checked for all mobile applications in order to use the SSO feature for those applications. By default, this option is not selected. Therefore, to use this feature for all JD Edwards EnterpriseOne mobile applications, it is recommended that you open each application after it is downloaded to the device, and select the option.

When using the SSO feature, be aware of the following:

- The user must successfully log in once to each application, with the Use Single Sign On option selected to save the value and allow SSO from then on.
- The SSO setting is stored on the device across sessions.
- If the session times out, the system automatically directs the user back to the Login screen.
- When a users launches a mobile application that does not have the SSO option selected, as soon as the user selects the option, the device attempts to find an existing SSO session.
- If the user logs out of one of the SSO-participating applications, and then tries to use another of the applications, the sign on request will fail and the system will direct the user to the Login screen.
- If the user logs out of one of the SSO-participating applications and then logs back in, and then tries to use another of the participating applications, the second application will refresh as if it was newly logged into, picking up the newly established SSO session.

3.1.2 Logging In When In Disconnected Mode (Release 9.1 Update)

Some mobile applications allow you to make changes to records while you are disconnected from the network. When you change a record while disconnected, your changes are stored locally on the device, and must be uploaded to the EnterpriseOne server when you are reconnected to the network.

To handle security issues, passwords cannot be stored locally on the mobile device. Therefore, logging into mobile applications in disconnected mode is slightly different than logging into an application while connected. Be aware of the following when logging into a disconnected mobile application:

- If you log into the application while connected, get disconnected, and then reconnect all in the same session, the Log In buttons will remain enabled. However, if the session has timed out, you will be required to log back in (once you are reconnected) before uploading data to, or retrieving data from the EnterpriseOne database.
- If you log in while disconnected and then become connected, the application will require you to log back in when you click any button in the application that performs any type of transaction with the EnterpriseOne database.

3.2 Logging Into Mobile Enterprise Applications

To log into a mobile application:

1. Download and install the application on your mobile device, and then tap the icon to open the application.
2. The first time you access the application, the system displays the Cannot Connect to Server dialog box. You must enter a valid url to connect to the EnterpriseOne database.

To enter a valid url, tap the text `http://server:port` and then enter the server location url. Obtain this url from your system administrator.

3. Tap OK to continue.
4. Enter values in these fields and then tap Login:
 - User Name
 - Password
 - Environment
 - Role

Figure 3–2 Enter User Credentials

Note that the Environment and Role fields might not appear on the log in screen. Display of these fields is determined by the system administrator.

5. To use the Single Sign On (SSO) feature, select the Use Single Sign On option.

Note that this option is displayed only if the system administrator has set the AIS server option to enable the SSO feature. Additionally, this option is deselected by default. You must select this option to use the SSO feature.

6. If you enter valid credentials, the application opens and is ready for use. If you enter invalid credentials, the system displays an error. Tap OK, and then enter valid user credentials.

3.3 Changing the Server Location URL

To change the server location url on an iOS device:

1. From the device Settings feature, select the application you want to update.
2. Enter the new url location.
3. Tap Settings to return to the previous screen.

To change the server location url on an Android device:

1. Open the application you want to update by tapping the icon.
2. If the current url is invalid, the application will prompt you to enter a valid url. If the current url is valid, tap the Menu button, then select Preferences to change the url.
3. Enter a valid url.

Understanding Mobile Barcode Scanning

This chapter discusses these topics:

- [Section 4.1, "Barcode Scanning Overview"](#)
- [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)
- [Section 4.3, "Mobile Applications that Support Barcode Scanning"](#)

4.1 Barcode Scanning Overview

There are many JD Edwards EnterpriseOne mobile applications that are designed to scan data from a barcode and populate data into the respective fields. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. Currently, JD Edwards EnterpriseOne mobile applications do not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc., and does not require or recommend that you use this service to create your barcodes.

Set the Bluetooth option in your device's settings to disable Bluetooth if you want to use the native device camera to scan barcodes of equipment number. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device on the mobile device.

4.2 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes

Many of the JD Edwards EnterpriseOne mobile applications have fields into which you can scan data. A QR Code icon is displayed next to the fields to which you can scan data.

You can populate these fields using three options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.

- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option in your device settings, the system may lock the keyboard. Consult the user manual of your third-party scanning device for instructions on how to use the keyboard when the scanning device is active.

4.3 Mobile Applications that Support Barcode Scanning

The following JD Edwards EnterpriseOne mobile applications are designed to scan data from barcodes:

- Condition-Based Maintenance for Mobile Tablet (M13101)
- Condition-Based Maintenance for Mobile Smartphone (M13102)
- Create Service Order for Mobile Tablet (M177141)
- Create Work Order for Mobile Tablet (M177142)
- Cycle Count for Mobile Tablet (M41240)
- Employee Time Entry for Mobile Tablet (M0511213)
- Equipment Work Order Time Entry for Mobile Tablet (M0511211)
- Equipment Work Order Time Entry for Mobile Smartphone (M0511212)
- Field Progress Entry for Mobile Tablet (M51050)
- Inventory Availability for Mobile Tablet (M41205)
- Inventory Availability for Mobile Smartphone (M41207)
- Inventory Transfer for Mobile Tablet (M41242)
- Manage Cases for Mobile Smartphone (M17510E)
- Manage Customer Equipment for Mobile Tablet (M17060)
- Manage Customer Equipment for Mobile Smartphone (M17061)
- Manage Equipment for Mobile Tablet (M13040)
- Manage Equipment for Mobile Smartphone (M13041)
- Manage My Work Orders for Mobile Tablet (M17020)
- Manage My Work Orders for Mobile Smartphone (M17010)
- Order Entry for Mobile Tablet (M42010)
- Product Price and Availability for Mobile Tablet (M41062)
- Product Price and Availability for Mobile Smartphone (M41063)
- Project Time Entry for Mobile Tablet (M51047)
- Project Time Entry for Mobile Smartphone (M51048)

- Quick Case Entry for Mobile Smartphone (M17500E)
- Search Sales Order for Mobile Tablet (M42060)
- Search Sales Order for Mobile Smartphone (M42061)
- Service Work Order Time Entry for Mobile Tablet (M3112211)
- Service Work Order Time Entry for Mobile Smartphone (M3112212)
- Warehouse Availability for Mobile Tablet (M46231)

Part I

Asset Lifecycle Management

This part contains the following chapters:

- [Chapter 5, "Create Equipment Work Orders Mobile Application"](#)
- [Chapter 6, "Equipment Work Order Time Entry Mobile Applications"](#)
- [Chapter 7, "Condition-Based Maintenance Mobile Applications"](#)
- [Chapter 8, "Manage Equipment Mobile Applications"](#)
- [Chapter 9, "Manage My Work Orders Mobile Applications"](#)
- [Chapter 10, "Meter Reading Mobile Applications"](#)
- [Chapter 11, "Review Team Work Orders Mobile Applications"](#)

Create Equipment Work Orders Mobile Application

This chapter discusses these topics:

- [Section 5.1, "Create Equipment Work Orders Mobile Application Overview"](#)
- [Section 5.2, "Setting Up the Create Equipment Work Orders Mobile Application"](#)
- [Section 5.3, "Using the Create Equipment Work Orders Mobile Tablet Application \(M177142\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Creating Work Orders Using the Work Order Entry Programs (P48201 and P17714)" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
 - "Updating Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
-
-

5.1 Create Equipment Work Orders Mobile Application Overview

You use the Create Equipment Work Orders mobile tablet application (M177142) to enter new equipment work orders, and to review and update existing work orders. You can use filters to search for equipment work orders. You can enter customer and equipment information, status and priority of the work order, requested completion date, enter notes and view previous notes.

You can update the status of the work order and also the associated children work orders.

This table lists the applications that are available to enter and update equipment work orders:

Type of Application	Additional Information
Base EnterpriseOne application	To enter and update equipment work orders, use these applications in the JD Edwards EnterpriseOne system: <ul style="list-style-type: none"> ■ Work with Work Orders (P48201) ■ Work Order Revisions program (P17714)
Tablet application	Create Equipment Work Orders (M177142) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Equipment WO

Before using the Create Equipment Work Orders mobile tablet application, you:

- Set processing options for the Create Equipment Work Orders mobile tablet application (M177142).
- Set processing options for the Work Order Revisions program (P17714) to display only maintenance work orders.

5.1.1 Differences and Limitations: Create Equipment Work Orders

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Difference in the Search Functionality

The Create Equipment Work Orders mobile application uses your login ID to search for your work orders. After you launch the mobile application, the system displays a list of all your work orders. You can filter work orders from your list.

When you search for work orders in the Work Order Entry program (P48201), you can specify the search criteria across all work orders to which you have access. Therefore, your search results in the mobile application can differ from the search results in the base application.

Difference in the Text Attachment Functionality

The Create Equipment Work Orders mobile application appends new text attachments that you enter to the existing texts attachments. In the mobile application, existing text attachments are read-only, and you cannot edit them. You can review existing attachments in the Notes History field and enter new texts in the New Notes field.

When you enter a new text attachment in the Work Order Revisions program (P17714), you are adding the new text to the existing texts in the text attachment entry field. You can update existing texts.

Barcode Scanning (Release 9.1 Update)

The Create Equipment Work Orders mobile application (M177142) is designed to scan data from a barcode and populate the equipment number in the Equipment Number field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc., and does not require or recommend that you use this service to create your barcodes.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

5.2 Setting Up the Create Equipment Work Orders Mobile Application

Before using the Create Equipment Work Orders mobile tablet application (M177142), you:

- Set processing options for the Create Equipment Work Orders mobile tablet application (M177142).
- Set processing options for the specified version of the Work Order Revisions program (P17714).
- (Release 9.1 Update) Set the Bluetooth option in your device's settings to disable Bluetooth if you want to use the native device camera to scan barcodes of equipment number. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device on the mobile device.

5.2.1 Setting Processing Options for the Create Equipment Work Orders Mobile Tablet Application (M177142)

You use processing options to specify default processing information for a program.

5.2.1.1 Versions

1. Work Order Revisions (P17714) Version

Use this processing option to specify which version of the Work Order Revisions program (P17714) the system uses. To process work orders, the Create Equipment Work Orders mobile tablet application (M177142) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0003.

2. Search for Work Orders (P48022) Version

Use this processing option to specify which version of the Search for Work Orders program (P48022) the system uses. To process work orders, the Create Equipment Work Orders mobile tablet application (M177142) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

5.2.2 Set Processing Options for the Work Order Revisions Program (P17714)

You also set up these processing options for the version of the Work Order Revisions program (P17714) that you specify:

- Work Order Document Type: Set this processing option to use maintenance work orders.

- Work Order Type: Set this processing option to use maintenance order.

Note: When you log in to the mobile applications, the system looks at these processing options of the Work Order Revisions program (P17714) and displays maintenance work orders.

Note: Oracle recommends that you use the information provided here to set the processing options for your version of the Work Order Revisions program (P17714). If you set the processing options differently, the Create Equipment Work Orders mobile application will not behave as expected.

See:

- "Setting Processing Options for the Work Order Revisions Program (P17714)" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

5.2.3 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Create Equipment Work Orders mobile application (M177142) includes the Equipment Number field in two locations in the app. One is in the filters screen, and another is in the screen that displays when you add a new equipment work order record. You use the Equipment Number filter to filter records by equipment number. When you create a new equipment work order record using the Create Equipment Work Orders mobile application (M177142), you must enter the equipment number in the Equipment Number field.

You can populate the Equipment Number field (in the filter screen, as well as in the add new equipment word order screen) using three options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note that when you enable the Bluetooth in your device settings, the system locks the keyboard and you can use the keyboard only after you disable the Bluetooth option.

5.3 Using the Create Equipment Work Orders Mobile Tablet Application (M177142)

The Create Equipment Work Orders mobile tablet application (M177142) enables you to add new equipment work orders, and to review and update existing work orders.

Before you can use the application, you must download and install the application from the application store on your device.

5.3.1 Entering Work Orders Using a Mobile Tablet Application (M177142)

To add new work orders:

1. Open the application by tapping the icon on your device, and then log in.
See [Section 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the My Equipment Work Orders screen, review the work orders in the list. In the right pane, the system displays the details of the work order that appears first in the list.

Figure 5–1 Create Equipment Work Orders Home Screen

The screenshot displays the 'My Equipment Work Orders' mobile application interface. The top status bar shows 'Carrier', '8:24 PM', and '100%' battery. The main header is 'My Equipment Work Orders' with a 'Save' button on the right. Below the header, there is a 'Work Order: 628308' section with two tabs: 'Work Order Details' (selected) and 'Notes'. The 'Work Order Details' section contains several fields:

- Work Order Description: Date issue
- Equipment Number: 1035 (with a search icon and 'Bev PM Test DU Status' label)
- Branch Plant: M30 (with a search icon and 'Eastern Manufacturing Center' label)
- Failure Description: DATE ISSUE
- Customer Number: 4242 (with a search icon and 'Capital System' label)
- Site Number: 4242 (with a search icon and 'Capital System' label)
- Assigned To Number: 8996050 (with a search icon and 'Anish' label)
- Supervisor Number: (with a search icon)
- Priority: High (dropdown menu)
- Requested Finish Date: Feb 7, 2014 (dropdown menu)

On the left side, there is a list of work orders with status indicators and right-pointing arrows:

- Date issue**: Work Order 628308, Maintenance Work Request
- Save issue**: Work Order 625932, Maintenance Work Request
- Issue not resolved**: Work Order 625334, Maintenance Work Request
- Date not saved**: Work Order 625254, Maintenance Work Request
- Event issue**: Work Order 610562, Maintenance Work Request
- AC not working**: Work Order 607507, Maintenance Work Request

At the bottom left, there is a menu icon and the 'ORACLE JD EDWARDS' logo. At the bottom right, there is a 'Photos' button.

3. To filter work orders, tap the filter icon at the top of the work order list and complete any of the following fields to narrow your search.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for work orders.

Priority

Tap the Priority dropdown menu and specify the priority that the system uses to search for work orders.

Order Date

Tap the From and To dropdown menus and specify the work order start date range that the system uses to search for work orders.

Equipment Number (Release 9.1 Update)

Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 5.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

4. In the filters screen, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of equipment work orders that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of equipment work orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. To add a work order, tap the add icon next to the filter icon.

Figure 5–2 Work Order Add Screen, Work Order Details Tab

The screenshot displays the 'My Equipment Work Orders' screen. At the top, it shows 'Carrier', '8:35 PM', and '100%' battery. The main title is 'My Equipment Work Orders' with a 'Save' button. Below the title, it indicates 'Document Type : WM - Maintenance Work Order' and 'Order Type : 1 - Maintenance Order'. There are three tabs: 'Work Order Details' (selected), 'Status Update', and 'Notes'. The left sidebar lists several work orders with their dates and statuses. The main form area contains the following fields:

- Work Order Description (mandatory, marked with *)
- Equipment Number (mandatory, marked with *, includes a search icon)
- Branch Plant (mandatory, marked with *, includes a search icon)
- Failure Description (mandatory, marked with *)
- Customer Number: 4242 (includes a search icon and 'Capital System' label)
- Site Number: 4242 (includes a search icon and 'Capital System' label)
- Assigned To Number: 8996050 (includes a search icon and 'Anish' label)
- Supervisor Number (includes a search icon)
- Priority: Med (dropdown menu)
- Requested Finish Date: Feb 28, 2014 (dropdown menu)

At the bottom, there is an Oracle JD Edwards logo and a 'Save and Add Photo' button.

The system displays equipment work order header information and two tabs: Work Order Details and Notes. The Work Order Details tab is open by default.

- You must enter values to the mandatory fields that are marked with an * (asterisk).

If you have set the processing options in the Work Order Revisions program (P17714) to use default values in the Customer Number, Assigned To Number, Priority, Supervisor Number, and Failure Description fields, the system populates these fields with the default values.

If you have not set up the processing option to use a default customer, the system populates the Customer Number field based on the equipment number that you enter. The system also populates the Site Number field based on the equipment number that you enter.

The system populates the Requested Finish Date field with the system date.

You can change the default values in all these fields.

Equipment Number (Release 9.1 Update)

Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 5.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Branch Plant

To add or change the branch plant, you can use the search icon to search for a value and return it to the Branch Plant field, or you can manually enter the branch plant number in the field.

Customer Number

To add or change the customer number, you can use the search icon to search for a value and return it to the Customer Number field, or you can manually enter the address book number of a customer in the field.

To search for a customer, tap the search icon. In the Customer search screen, you can use a combination of the customer name and search type to search for a customer. After you specify values for your search, tap the Search button. The system pulls up all records that satisfy the search criteria.

To discontinue the search and to go back to the filters screen, tap the Cancel button.

To return a value back to the Customer Number field, tap the customer record from the search result.

7. To change the priority of the work order, tap the Priority dropdown menu and select a priority level.
8. You can also update the status of the work order by tapping the Advance Status button.

Note: Based on the work order activity rules, the system displays the Advance Status button with the next status. If work order activity rules are not applicable for your work order, or if the status is complete and no more statuses are available, then this button does not appear.

9. To select the date when you request the work order to be completed, tap the Requested Finish Date dropdown menu.
10. If you set the processing option in the Work Order Revisions program (P17714) to automatically display the status window when adding a work order, the system displays the Status Update tab next to the Work Order Details tab.

If you enter a valid equipment number in the Equipment Number field, the system displays the Equipment Status Information section in the Status Update screen.

To update the work order status and to enter remarks about the work order status change, tap the Status Update tab.

Figure 5-3 Status Update Screen

The screenshot shows the 'My Equipment Work Orders' screen. At the top, it displays 'Carrier', '8:36 PM', and '100%' battery. The main title is 'My Equipment Work Orders' with a 'Save' button and a menu icon. Below the title, it shows 'Document Type : WM - Maintenance Work Order' and 'Order Type : 1 - Maintenance Order'. There are three tabs: 'Work Order Details', 'Status Update' (selected), and 'Notes'. On the left, there is a list of work orders with categories like 'Date issue', 'Save issue', 'Issue not resolved', 'Date not saved', 'Event issue', and 'AC not working'. The main area shows 'Work Order Status Information' with a 'Beginning Date and Time' dropdown set to 'Feb 28, 2014, 8:35 PM', a 'New Status' dropdown set to 'M Maintenance Work Request', and a 'Remark' text field. Below that is 'Equipment Status Information' with a 'Current Status' dropdown set to 'AV Available - On Job Site', a 'New Status' dropdown set to '-- Select One --', and an 'Update Children Status' radio button. At the bottom, there is a 'Save and Add Photo' button and the Oracle JD Edwards logo.

11. To change the date and time when a status is assigned to the work order, tap the Beginning Date and Time dropdown menu.
12. To enter remarks about the status, tap the Remarks field.
13. To change the status of the work order, tap the New Status dropdown menu and select a status.
14. To automatically update the status of the children work orders associated with the work order, tap the Update Children Status option.
15. To enter notes, tap the Notes tab and enter texts in the New Notes field.
16. You can access the Clear and Defaults options by tapping the menu button next to the Save button.

To delete the values you entered and to enter new values, tap the Clear button.

To restore the default values, tap the Defaults button.

To save your entries, tap the Save button. To save the work order and to add photos to the work order, tap the Save and Add Photo button at the bottom right of the screen.

If you navigate away from the work order record without saving your updates, you will lose unsaved changes.

17. To add a work order photo, tap the Add button in the Equipment Work Order Photos screen.

The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the service order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature.

18. You can add a description of the photo. To save the photo, tap the Save button. The system adds the photo to the Equipment Work Order Photos screen, and increments the number of photos available by 1 (One) in the Photos button.
19. To discontinue adding the photo and to go back to the Equipment Work Order Photos screen, tap the Cancel button.
20. To go back to the My Equipment Work Orders screen, tap the Back button.
21. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

5.3.2 Reviewing and Updating Work Orders By Using a Mobile Tablet Application

1. To review and update an existing work order, tap the work order from the My Equipment Work Orders screen. The system displays the details screen of the work order and you can review and update information about the work order.

Figure 5–4 Work Order Update Screen

The screenshot displays the 'My Equipment Work Orders' screen. On the left is a list of work orders with categories like 'Date issue', 'Save issue', 'Issue not resolved', 'Date not saved', 'Event issue', and 'AC not working'. The right side shows the 'Work Order Details' for Work Order: 628308. Fields include: Work Order Description (Date issue), Equipment Number (1035), Branch Plant (M30), Failure Description (DATE ISSUE), Customer Number (4242), Site Number (4242), Assigned To Number (8996050), Supervisor Number, Priority (High), and Requested Finish Date (Feb 7, 2014). A 'Save' button is at the top right, and a 'Photos' button is at the bottom right. The Oracle JD Edwards logo is at the bottom left.

2. To enter notes and to view previous notes, tap the Notes tab. To enter notes, tap the New Notes field and enter texts.

Note: When you enter text in the New Notes field and tap the Save button, the system adds the new text to the text in the Notes History field, and leaves the New Notes field blank.

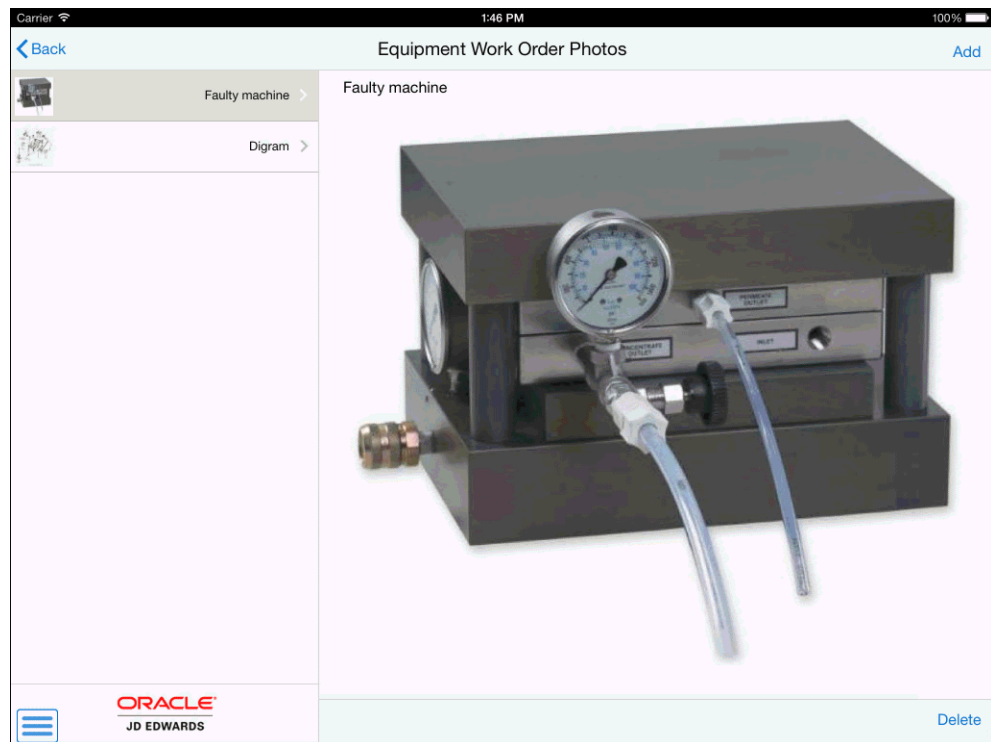
3. To view photos of the work order, or the equipment associated with the work order, tap the Photos button.

When you tap the Photos button, the system displays two options: Equipment Work Order Photos and Equipment Photos. The number displayed on each option represents the total number of photos related to the work order or the equipment.

4. To view existing photos of the equipment work order and to add new photos, tap the Equipment Work Order Photos option.

To view photos of the equipment, tap the Equipment Photos option.

Figure 5–5 Equipment Work Order Photos: Tablet



A list of photos appear as thumbnails in the left pane. In the right pane, the system displays the photo that is first on the list.

To view a photo, tap the photo thumbnail. To delete a photo, tap the Delete button. On the confirmation window that opens, tap to confirm that you are deleting the photo. The system removes the photo from the list of photos.

To add a photo to the equipment work order, tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the service order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature.

Note: You cannot add or delete photos when you select the Equipment Photos option. The photos that you see in the Equipment Photos screen are retrieved from the EnterpriseOne system.

5. You can add a description of the photo. To save the photo, tap the Save button. The system adds the photo to the list of photos, and increments the number of photos available by 1 (One).

6. To go back to the My Equipment Work Orders screen, tap the Back button.
7. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Equipment Work Order Time Entry Mobile Applications

This chapter discusses these topics:

- [Section 6.1, "Equipment Work Order Time Entry Mobile Applications Overview"](#)
- [Section 6.2, "Setting Up the Equipment Work Order Time Entry Mobile Applications"](#)
- [Section 6.3, "Using the Equipment Work Order Time Entry Mobile Tablet Application \(M0511211\)"](#)
- [Section 6.4, "Using the Equipment Work Order Time Entry Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- *Setting Up Work Orders in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
 - *Working with Equipment Information in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
-
-

6.1 Equipment Work Order Time Entry Mobile Applications Overview

You use the Equipment Work Order Time Entry mobile applications to enter, search, edit, and delete equipment timecards. The smartphone and tablet applications enables you to enter time against a piece of equipment, and also update and review each timecard's work date, employee hours, work order number, pay type, operation sequence, equipment worked and hours. You can use the filters or history to search for equipment timecards.

This table lists the applications that are available to review existing timecard information and to enter new timecard information for employees:

Type of Application	Additional Information
Base EnterpriseOne application	To update existing timecards, and to enter new timecards for equipment work order time entry, use the Speed Time Entry program (P051121) in the JD Edwards EnterpriseOne system.
Tablet application	Equipment Work Order Time Entry (M0511211) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Work Order Time
Smartphone application	Equipment Work Order Time Entry (M0511212) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Work Order Time

6.1.1 Differences and Limitations: Equipment Work Order Time Entry

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The functions of Equipment Work Order Time Entry mobile applications are not different from base EnterpriseOne applications. However, Equipment Work Order Time Entry mobile applications do offer the user a subset of equipment work order timecards information. Not all the work order timecard information available in the base software is available in the mobile applications.

Barcode Scanning (Release 9.1 Update)

The Equipment Work Order Time Entry tablet application (M0511211) and the Equipment Work Order Time Entry smartphone application (M0511212) are designed to scan data from a barcode and populate the equipment number in the Equipment Worked field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

6.2 Setting Up the Equipment Work Order Time Entry Mobile Applications

Before using the Equipment Work Order Time Entry mobile applications, verify that the processing options for each application are set correctly. The processing options for both the tablet and the smartphone applications specify which versions of the base EnterpriseOne applications the mobile applications use.

The system administrator must set the processing options for these mobile applications before the applications are made available to end users.

See *Setting Processing Options for the Speed Time Entry Program (P051121) in the JD Edwards EnterpriseOne Time and Labor Implementation Guide*.

(Release 9.1 Update) You can use one of the following options to scan barcodes of equipment number:

- Disable the Bluetooth option in the settings on your device if you want to use the native device camera to scan the barcodes of equipment number.
- Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes of equipment number.

To scan barcodes using the Bluetooth scanning device, you must configure the scanning device to the mobile device.

6.2.1 Setting Processing Options for the Equipment Work Order Time Entry Mobile Tablet Application (M0511211)

You use processing options to specify default processing information for a program.

6.2.1.1 Versions

1. Speed Time Entry (P051121) Version

Use this processing option to specify which version of the Speed Time Entry program (P051121) the system uses. If you leave this processing option blank, then the system uses the version ZJDE0001.

6.2.2 Setting Processing Options for the Equipment Work Order Time Entry Mobile Smartphone Application (M0511212)

You use processing options to specify default processing information for a program.

6.2.2.1 Versions

1. Speed Time Entry (P051121) Version

Use this processing option to specify which version of the Speed Time Entry program (P051121) the system uses. If you leave this processing option blank, then the system uses the version ZJDE0001.

6.2.3 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Equipment Work Order Time Entry tablet application (M0511211) and the Equipment Work Order Time Entry smartphone application (M0511212) include the Equipment Worked field in two locations in the application. One is in the Equipment Work Order Time Entry screen for tablet and Details screen for smartphone that display when you select a specific equipment work order timecard. Another is the Equipment Work Order Time Entry screen for tablet and Details screen for smartphone that display when you add a new work order time entry. You can modify the equipment number of a specific equipment work order timecard in the Equipment Worked field. When you enter a new work order time entry using the Equipment Work Order Time Entry tablet and smartphone applications, you must enter the equipment number in the Equipment Worked field.

You can populate the Equipment Worked field (in the specific equipment work order timecard screen, as well as in the add new equipment work order time entry screen) using the following options:

- Use the keyboard on your mobile device to manually enter the data.

- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option on your device, the system may disable the device's keyboard.

6.3 Using the Equipment Work Order Time Entry Mobile Tablet Application (M0511211)

The Equipment Work Order Time Entry tablet application enables you to:

- Add equipment timecards.
- Search and review existing equipment timecards.
- Update equipment timecards.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

6.3.1 Reviewing and Updating Equipment Work Order Time Entries Using a Mobile Tablet Application

To review and update equipment work order timecards on your tablet:

1. Open the application by tapping the icon on your device, and then log in.
See [Section 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Equipment Work Order Time Entry home screen, review the timecards.

Figure 6–1 Equipment Work Order Time Entry

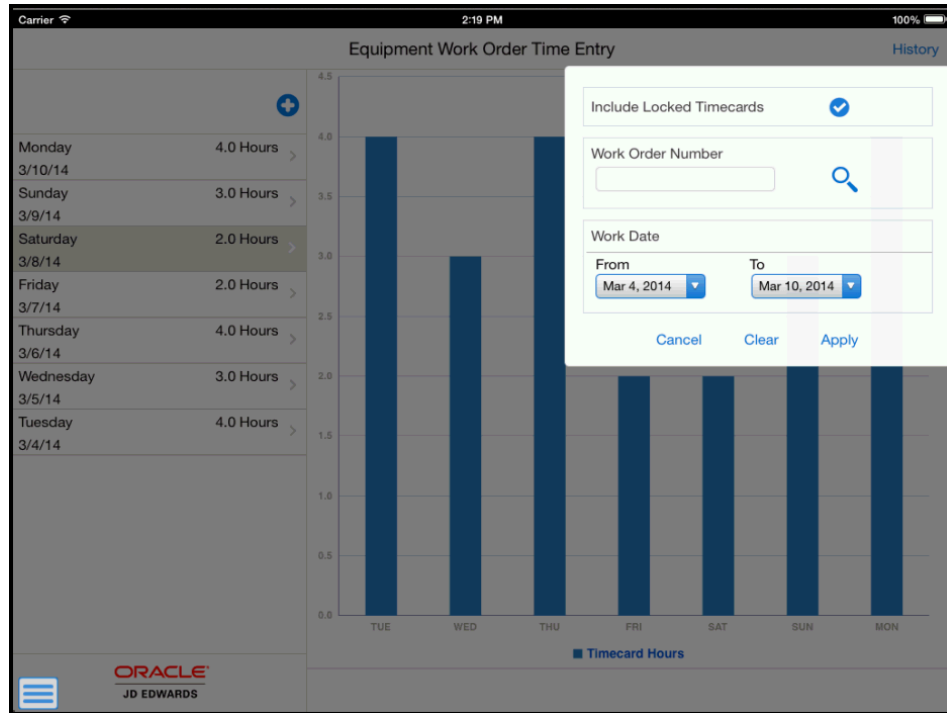
The system displays a list of timecards that were entered during the last seven days since the system date. To refresh the data on the screen, swipe down on the panel with the list of timecards.

Note that the timecards displayed in the list are also graphically displayed on the right side of the screen.

3. To search for equipment work order timecards, tap the History button at the top right of the Equipment Work Order Time Entry screen.

Note: The History button is available only on the home screen. You can use either the History or the Filter button in the application to search for equipment work order timecards.

Figure 6–2 Equipment Work Order Time Entry - History



Include Locked Timecards

To include locked timecards, tap the Include Locked Timecards check box.

Work Order Number

To add a work order to your search criteria, you can use the Visual Assist icon to search for a value and return it to the Work Order Number field, or you can manually enter a work order number in the field.

Work Date

To select the work date range to display a specific work order timecard, tap the Work Date dropdown menus.

To continue the search, tap the Apply button.

To discontinue the search, tap the Cancel button.

To delete all the search values you specified, and to enter new search values, tap the Clear button.

4. To view detailed information of a specific equipment work order timecard, tap the timecard in the left pane, or the bar in the graph that coincides with the timecard that you want to view in the right pane.
5. To review equipment work order timecards for a specific day, tap the Day dropdown menu in the left pane and select an option from the list.
6. To review and update an equipment work order timecard, tap the timecard on the left pane.

Figure 6–3 Equipment Work Order Time Entry - Edit

The screenshot displays the 'Equipment Work Order Time Entry - Edit' interface. On the left, a list of work orders is shown, including 'STD Configured Child', 'Complete Late', 'Request before Today', and several 'Complete on WO Date - Late' entries. The right side of the screen is a form for editing the selected work order, 'Request Before Today' (Work Order # 1004). The form contains the following fields: 'Work Date' (Mar 25, 2017), 'Employee Hours' (3.00), 'Pay Type' (2, AU Regular), 'Operation Sequence' (.00), 'Equipment Worked' (1130, with a QR code icon and 'Service Truck' label), and 'Equipment Hours' (0.00). The bottom of the screen features the Oracle JD Edwards logo and a 'Delete' button.

On the Equipment Work Order Time Entry screen, work order number and work order description are non-editable.

Select the work date from the dropdown menu, enter the timecard details, and then tap Save.

Use the Search icons to search for and select values for the Pay Type, Operation Sequence, and Equipment Worked fields.

(Release 9.1 Update) Enter data in the Equipment Worked field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.

- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Worked field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Worked field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 6.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Worked field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Worked field to search and select a piece of equipment.

7. To save an existing timecard, tap the Save button.

After, you save the timecard, the system updates and displays the new timecard in the left pane.

8. To delete the equipment work order timecard, tap the Delete button.

When you tap Delete button, the system displays a message **Confirm Delete Yes or No**.

If you select **Yes**, the system deletes the timecard from the time entry list.

If you select **No**, the system returns to the Equipment Work Order Time Entry screen.

6.3.2 Entering Equipment Work Order Timecards Using a Mobile Tablet Application

To enter an equipment work order timecard on your tablet:

1. Open the application by tapping the icon on your device, and then log in.
See Chapter 2, "Logging Into Mobile Enterprise Applications."
2. To add an equipment work order timecard, tap the Add icon at the top right of the Equipment Work Order Time Entry list.

Figure 6–4 Equipment Work Order Time Entry - Add

On the Equipment Work Order Time Entry screen, select the work date from the dropdown menu, and enter the Employee Hours and Equipment Hours details.

Use the Search icons to search for and select values for the Work Order Number, Pay Type, Operation Sequence, and Equipment Worked fields.

Equipment Worked (Release 9.1 Update)

Enter data in the Equipment Worked field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Worked field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Worked field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 6.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Worked field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Worked field to search and select a piece of equipment.

In the Add screen, after you add the timecard, tap the Save button.

The system displays a message **Record Created**. The system updates and displays the new timecard in the left pane.

3. To return to the home screen, tap the Charts button.
4. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

6.4 Using the Equipment Work Order Time Entry Mobile Smartphone Application

The Equipment Work Order Time Entry smartphone application enables you to review and update equipment work order timecards.

Before you can use the application, you must download and install the application from the application store on your device.

6.4.1 Reviewing and Updating Equipment Work Order Time Entries Using a Mobile Smartphone Application

To review and update equipment work order time entry on your smartphone:

1. Open the application by tapping the icon on your device, and then log in.
See [Section 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Equipment Work Order Time Entry home screen, review the timecards for the past seven days.

Figure 6-5 Work Order Time Entry

Day	Date	Hours
Monday	02/24/14	5.0 Hours
Sunday	02/23/14	0 Hours
Saturday	02/22/14	13.0 Hours
Friday	02/21/14	6.0 Hours
Thursday	02/20/14	7.0 Hours
Wednesday	02/19/14	7.0 Hours
Tuesday	02/18/14	5.0 Hours

- To filter timecards, tap the Filters button at the top left of the Work Order Timecard list, and complete any of these fields to narrow your search:

Include Locked Timecards

To include locked timecards, tap the Include Locked Timecards check box.

Work Order Number

To add a work order to your search criteria, use the Search icon to search for a value and return it to the Work Order Number field. You can also manually enter a work order number in the field.

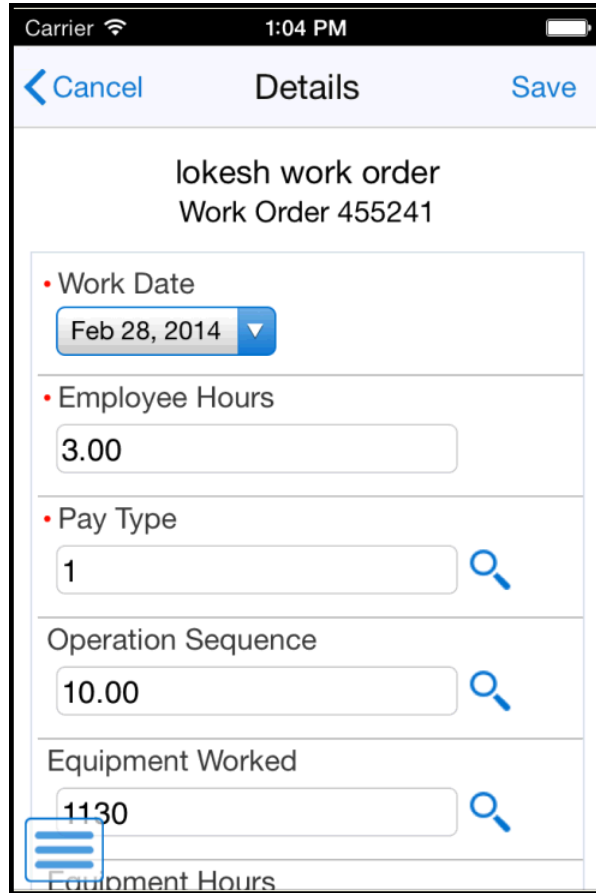
Work Date

To select the work date range to display a specific work order timecard, tap the Work Date dropdown menus.

- In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of timecards that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.
- To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of work order timecards associated with the last saved filter values, if applicable.
 - Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.
- To delete all filter values you specified, and to enter new filter values, tap the Clear button.
6. To review and update the timecards, tap the existing work order timecards from the Work Order Time Entry list.

Figure 6–6 Equipment Work Order Time Entry - Edit



The system displays work order number and work order description by default, based on your work order timecard selection. You cannot edit the work order number and the work order description.

In the Details screen, select the work date from the Work Date dropdown menu. Then, enter the employee hours and equipment hours details.

Use the search icons to search and select values for the Pay Type and Operation Sequence fields for a specific work order timecard.

(Release 9.1 Update) Enter data in the Equipment Worked field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.

- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Equipment Worked field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Equipment Worked field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.
See [Section 6.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Worked field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See [Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide](#).

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Worked field to search and select a piece of equipment.

To save the work order timecard information, tap the Save button.

To go back to the home screen, tap the Cancel button.

7. To delete the timecard, tap the Delete button.

When you tap the Delete button, the system displays a message **Confirm Delete Yes or No**.

If you select **Yes**, the system deletes the timecard from the time entry list.

If you select **No**, the system return to the Equipment Work Order Time Entry screen.

6.4.2 Entering Equipment Work Order Time Entry Using a Mobile Smartphone Application

To enter an equipment work order time entry on your smartphone:

1. Open the application by tapping the icon on your device, and then log in.
See [Section 3, "Logging Into Mobile Enterprise Applications"](#)
2. To add timecards, tap the Add button at the top right of the Equipment Work Order list.

Figure 6-7 Equipment Work Order Time Entry - Add

Day	Hours	Date
Monday	5.0 Hours	02/24/14
Sunday	0 Hours	02/23/14
Saturday	13.0 Hours	02/22/14
Friday	6.0 Hours	02/21/14
Thursday	7.0 Hours	02/20/14
Wednesday	7.0 Hours	02/19/14
Tuesday	5.0 Hours	02/18/14

Figure 6–8 Add Screen

On the Details screen, select the work date from the Work Date dropdown menu. Then, enter the Employee Hours and Equipment Hours details.

You can use the Visual Assist buttons to search and select values for the Work Order Number, Pay Type, and Operation Sequence fields.

Equipment Worked (Release 9.1 Update)

Enter data in the Equipment Worked field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 6.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Worked field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Worked field to search and select a piece of equipment.

On the Details screen, after, you add the timecard, tap the Save button.

3. To return to the home screen, tap the Cancel button.
4. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Condition-Based Maintenance Mobile Applications

This chapter discusses these topics:

- [Section 7.1, "Condition-Based Maintenance Mobile Applications Overview"](#)
- [Section 7.2, "Setting Up the Condition-Based Maintenance Mobile Applications"](#)
- [Section 7.3, "Using the Condition-Based Maintenance Mobile Tablet Application"](#)
- [Section 7.4, "Using the Condition-Based Maintenance Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Entering Condition-Based Alerts in the JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide](#)
-
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7.1 Condition-Based Maintenance Mobile Applications Overview

You use the Condition-Based Maintenance mobile applications to review condition-based alert messages, and to manually enter or update alerts from within the JD Edwards EnterpriseOne system. You can use the Condition-Based Maintenance mobile applications to:

- Add important alert information, including media objects that contain time stamps.
- Send a notification alert message manually or automatically to those who need instant notification of critical equipment status, such as technicians, supervisors, or a distribution list.
- Respond to the alerts. When the system receives an equipment alert, you can send an investigation message to one person, such as a plant technician or supervisor, or to a distribution list, to begin the investigation process. You can then generate a work order or update the preventive maintenance schedule, based on the setup parameters for condition-based maintenance. You can respond to alerts manually

or automatically by setting up alert action rules. The responses available for condition-based alerts include:

- Initiating an investigation request
- Creating a work order to inspect, repair, or replace the cause of the alert
- Updating the preventive maintenance schedule

This table lists the applications that are available to review, enter, or modify the condition-based maintenance alerts:

Type of Application	Additional Information
Base EnterpriseOne application	Use these applications in the JD Edwards EnterpriseOne system to work with condition-based maintenance alerts: <ul style="list-style-type: none"> ■ Condition-Based Alerts Workbench (P1310) ■ Condition-Based Alerts Revisions (P1311)
Tablet application	Condition-Based Maintenance (M13101) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Condition-Based Maintenance
Smartphone application	Condition-Based Maintenance (M13102) To download the smartphone application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Condition-Based Maintenance

Before using the Condition-Based Maintenance tablet or smartphone application, you should first set the processing options for each application.

7.1.1 Differences and Limitations: Condition-Based Maintenance

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The Condition-Based Maintenance tablet and smartphone mobile applications allow mobile users to review only open alerts by default. However, users can explicitly specify if they want to review the closed status records also.

Language Support

Additionally, you should be aware of how a user’s language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

Barcode Scanning (Release 9.1 Update)

The Condition-Based Maintenance mobile tablet application (M13101) and the Condition-Based Maintenance mobile smartphone application (M13102) are designed to scan data from a barcode and populate the equipment number in the Equipment Number field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

7.2 Setting Up the Condition-Based Maintenance Mobile Applications

Before using the Condition-Based Maintenance mobile applications, verify that the processing options for each application are set correctly. The processing options for both the tablet and the smartphone applications specify which versions of the base EnterpriseOne applications the mobile applications use.

These are the setup tasks that you should complete before using the mobile applications:

- Review processing options for the Condition-Based Alerts Workbench (P1310) application. See Setting Processing Options for Condition-Based Alerts Workbench (P1310).
- Review processing options for the Condition-Based Alerts Revision (P1311) application. See Setting Processing Options for Condition-Based Alerts Revision (P1311).
- Set processing options for the Condition-Based Maintenance mobile applications (M13101 and M13102).

(Release 9.1 Update) You can use one of the following options to scan barcodes of equipment number:

- Disable the Bluetooth option in the settings on your device if you want to use the native device camera to scan the barcodes of equipment number.
- Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes of equipment number.

To scan barcodes using the Bluetooth scanning device, you must configure the scanning device to the mobile device.

7.2.1 Setting Processing Options for the Condition-Based Maintenance Mobile Tablet Application (M13101)

You use processing options to specify default processing information for a program.

7.2.1.1 Versions

1. Condition-Based Alerts Workbench (P1310) Version

Use this processing option to specify which version of the Condition-Based Alerts Workbench program the mobile application uses to determine default values while working with condition-based alerts. If you leave this option blank, the application uses version ZJDE0001.

2. Condition-Based Alert Revisions (P1311) Version

Use this processing option to specify which version of the Condition-Based Alert Revisions program the mobile application uses to determine default values while working with condition-based alerts. If you leave this option blank, the application uses version ZJDE0001.

7.2.2 Setting Processing Options for the Condition-Based Maintenance Mobile Smartphone Application (M13102)

You use processing options to specify default processing information for a program.

7.2.2.1 Versions

1. Condition-Based Alerts Workbench (P1310) Version

Use this processing option to specify which version of the Condition-Based Alerts Workbench program the mobile application uses to determine default values while working with condition-based alerts. If you leave this option blank, the application uses version ZJDE0001.

2. Condition-Based Alert Revisions (P1311) Version

Use this processing option to specify which version of the Condition-Based Alert Revisions program the mobile application uses to determine default values while working with condition-based alerts. If you leave this option blank, the application uses version ZJDE0001.

7.2.3 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Condition-Based Maintenance mobile tablet application (M13101) and the Condition-Based Maintenance mobile smartphone application (M13102) include the Equipment Number field in three locations in the application. One is in the filter screen. Another location displays when you choose any existing conditioned-based alert record; the Equipment Number field displays when you select the Alert Details tab in the Condition-Based Maintenance Alert screen for tablet and in the Displays screen for smartphone. The third location displays when you add a new conditioned-based alert; the Equipment Number field displays when you select the Alert Details tab in the Condition-Based Maintenance Alert screen for tablet and in the Displays screen for smartphone. You use the Equipment Number filter to filter records by equipment number. You can modify the equipment number of a conditioned-based alert record in the Equipment Number field that is displayed in the Alert Details screen. When you create a new conditioned-based alert using the Condition-Based Maintenance tablet and smartphone applications, you must enter the equipment number in the Equipment Number field.

You can populate the Equipment Number field (in the filter screen, in the Alert Details screen of any existing conditioned-based alert record, as well as in the add new conditioned-based alert screen) using the following options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option on your device, the system may disable the device's keyboard.

7.3 Using the Condition-Based Maintenance Mobile Tablet Application

The Condition-Based Maintenance tablet application enables you to:

- Review condition-based alert messages.
- Add important alert information.
- Send notification alert messages.
- Add or delete photos for alerts.
- Add notes for alerts.

Before you can use the application, you must download and install the application from the application store on your device.

7.3.1 Reviewing and Updating Condition-Based Alerts Using a Mobile Tablet

To review and update condition-based maintenance alerts:

1. Open the application by tapping the CBM Alert icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. The device displays the Condition-Based Maintenance Alert screen with the list of all open status alerts with details, such as alert description, equipment number and description, alert level number and description, alert status and description, and unit number in the left pane. The device displays the details of the first record in the right pane of the screen.

To narrow your search using the filter fields, tap the Filter button, and specify values in these fields on the Filters screen:

Closed Status Alerts

Technician

Customer Number

Location

Site Number

Equipment Number (Release 9.1 Update) - This field retrieves the equipment list based on the equipment number. Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.

- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 7.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Number field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Number field to search and select a piece of equipment.

3. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the device:
 - Takes you to the list of maintenance alerts that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the device:

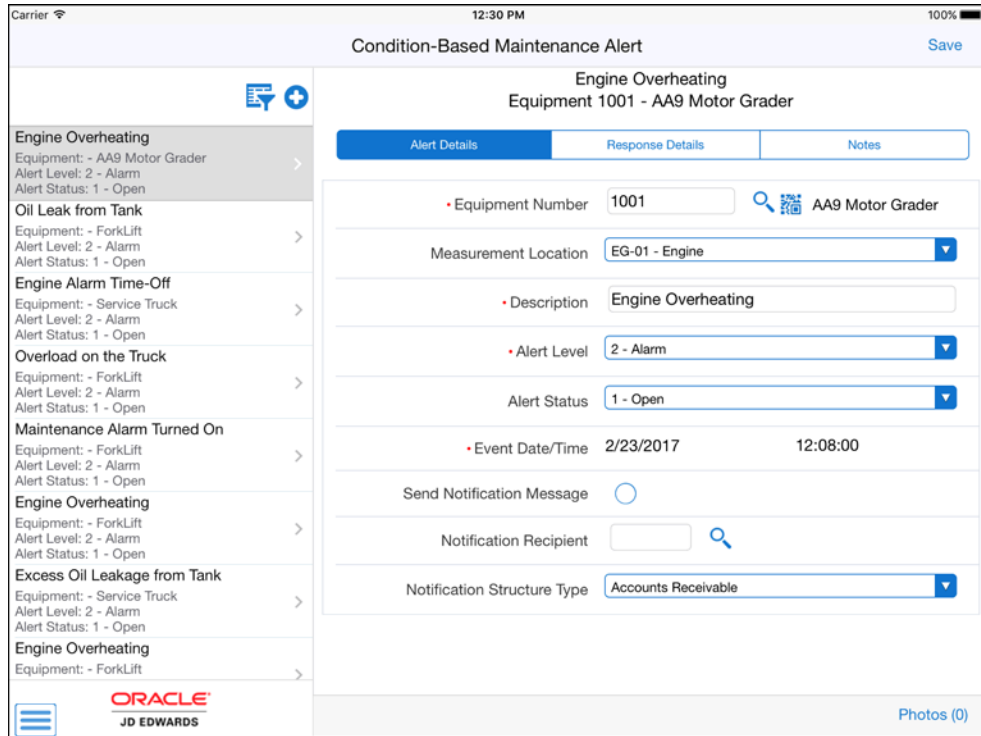
- Takes you to the Condition-Based Maintenance Alert screen associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

4. The system returns you to the Condition-Based Maintenance Alert screen with a list of condition-based alerts that meet your search criteria. The first record is automatically selected, and details associated with that record are displayed on the right side of the screen.

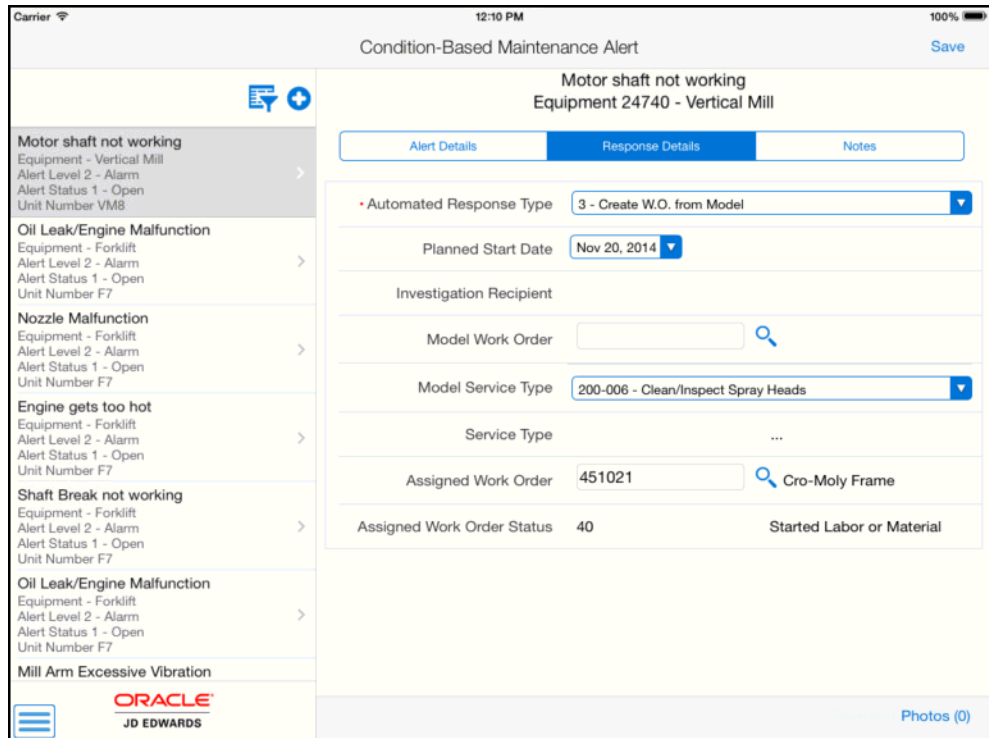
Tap any record in the list to review the details for that record.
5. On the Alert Details tab, review and modify the alert details. Tap the Save button at the top right to save any changes you make on this tab.

Figure 7-1 Condition-Based Maintenance - Alert Details Tab



6. Tap the Response Details tab to review or update response details for the alert. Tap the Save button at the top right to save any changes you make on this tab.

Figure 7-2 Condition-Based Maintenance - Response Details Tab



7. To view photos for the selected maintenance alert, tap the Photos (#) button at the bottom right. The number on the button represents the number of available photos. The application displays a list of available photos, with the first photo in the list displayed on the right of the screen. To view a different photo, tap the photo in the list.
8. To delete a photo, tap the photo you want to delete, and then tap the Delete button on the CBM Alert Photos screen.
9. To add a photo, tap the Add button on the CBM Alert Photos screen, and then select Album or Camera.

To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. To take a new photo, tap the Camera option, and then take a new photo using the device's camera feature. On the New Photo screen, enter a name for the photo and tap the Save button.

Tap the Back button on the Photos screen to return to the Condition-Based Maintenance Alert screen.
10. Tap the Notes tab to review the existing notes, or to add new notes and tap the Save button. The new note appears at the bottom of the Notes History section after it is saved.
11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

7.3.2 Adding Condition-Based Alerts Using ta Mobile Tablet

To add condition-based maintenance alerts:

1. Open the application by tapping the CBM Alert icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)
2. Tap the Add icon on the Condition-Based Maintenance Alert screen.
3. Enter the alert details on the Alert Details tab of the Condition-Based Maintenance Alert screen.

Equipment Number (Release 9.1 Update)

This is a required field. Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 7.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Number field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Number field to search and select a piece of equipment.

Measurement Location and Description

Select a value from the Measurement Location drop-down that indicates a measurement location on a piece of equipment. You can use this code to indicate where a measurement is taken or where an alert originates from a piece of equipment.

Enter a description for measurement location in the Description field. You must enter a value in the Description field.

Alert Level

Select the level for the alert from the Alert Level drop-down menu. You must select a value in this field.

Alert Status

Select a status for the alert from the Alert Status drop-down menu. If you leave this field blank, the system automatically assigns an open status to the alert.

Event Date/Time

Enter the date on which an event occurred, such as the date of a test reading or the date of a condition-based alarm. This is a required field.

Send Notification Message

Select the radio button to specify that a notification message is sent when a condition-based alert is entered into the system. If you do not select the button, the system does not send a notification message.

The status of radio button can be populated from the processing options or from the information setup in the alert action rules.

Additionally, complete any of the remaining optional fields on the Alert Details tab, and then tap the Save button at the top right.

The system displays the Record Created message.

4. To set up alert action rules to respond to alerts automatically, tap the Response Details tab.

Automated Response Type

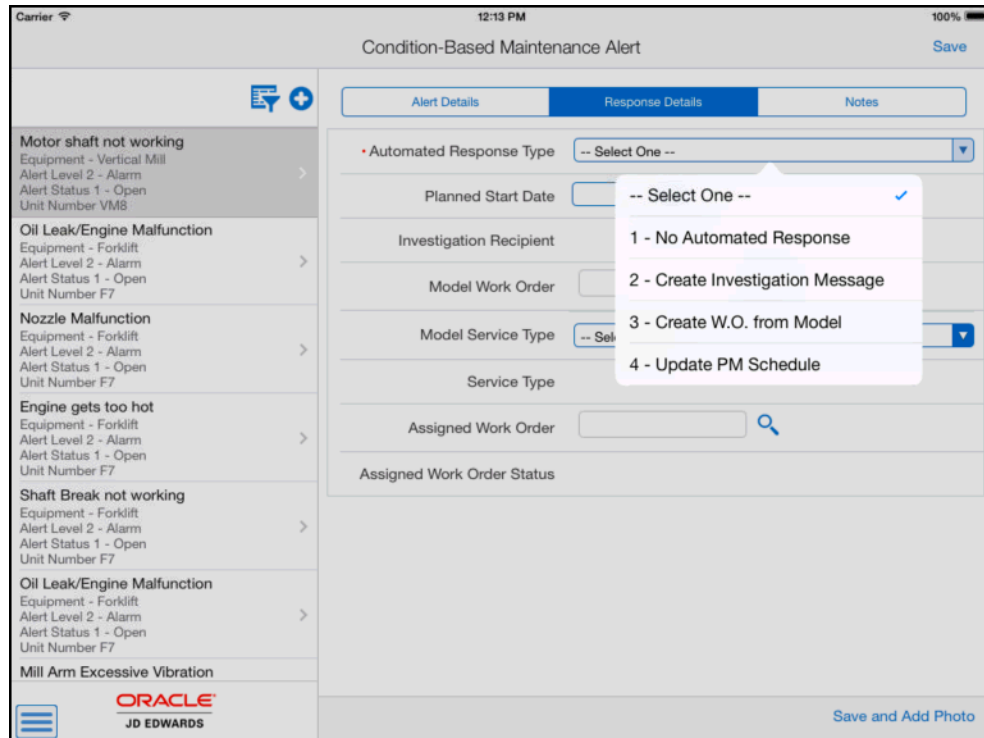
Select a value from the drop-down menu to specify the value for the automated response type for the condition-based alert record. Based on the value you select in this field, the system activates some of the fields for user entry:

- 2: When you specify the response type 2, the device enables the Investigation Recipient field for user entry.
- 3: When you specify the response type 3, the device enables the Model Work Order and Model Service Type fields for user entry.

- 4: When you specify the response type 4, the device enables the Service Type field for user entry.

Note: You must enter values in the fields that the device enables based on the response type that you select.

Figure 7-3 Condition- Based Maintenance - Response Details Tab



Additionally, complete any of the remaining optional fields on the Response Details tab, and then tap the Save button at the bottom right.

5. Tap the Notes tab to review notes, or add new notes to the record. To enter a new note, enter text in the New Notes section and tap the Save button. The new note appears at the bottom of the Notes History section after it is saved.
6. To add photos for the new alert, while entering details on the Alert, Response, or Notes tab, tap the Save and Add Photo button at the bottom right of the respective tab to save the record and add photos for the new alert.

Alternately, to add a photo for a new alert that is already saved, tap the Photos button at the bottom right.

7. Tap the Add button on the CBM Alert Photos screen, and then select Album or Camera.

To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. To take a new photo, tap the Camera option, and then take a new photo using the device's camera feature. On the New Photo screen, enter a name for the photo and tap the Save button.

Tap the Back button on the Photos screen to return to the Condition-Based Maintenance Alert screen.

8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

7.4 Using the Condition-Based Maintenance Mobile Smartphone Application

The Condition-Based Maintenance smartphone application enables you to:

- Review condition-based alert messages.
- Add important alert information.
- Send notification alert messages.
- Add or delete photos for alerts.
- Add notes for alerts.

Before you can use the application, you must download and install the application from the application store on your device.

7.4.1 Reviewing and Updating Condition-Based Alerts Using a Mobile Smartphone

To review and update condition-based maintenance alerts:

1. Open the application by tapping the CBM Alert icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. The device displays the CBM Alert screen with the list of all open status alerts with details such as alert description, equipment number and description, alert level number and description, alert status and description, and unit number.
3. To narrow your search using the filter fields, tap the Filter button, and specify values in these fields on the Filters screen:

Closed Status Alerts

Technician

Customer Number

Location

Site Number

Equipment Number (Release 9.1 Update) - This field retrieves the equipment list based on the equipment number. Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.

- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 7.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Number field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See [Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide](#).

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Number field to search and select a piece of equipment.

4. In the Filters screen, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the device:

- Takes you to the Condition-Based Maintenance Alert screen associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the device:

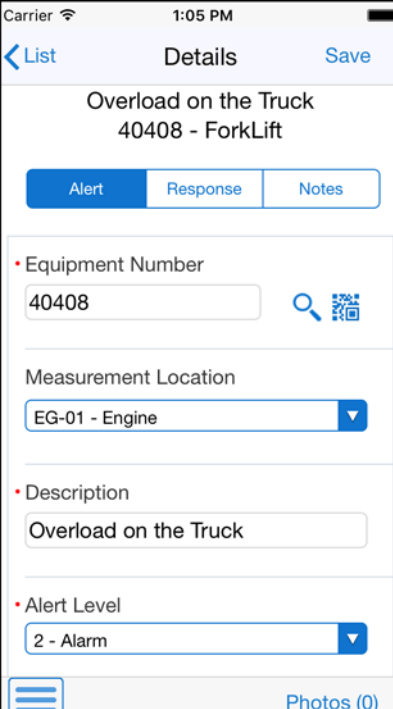
- Takes you to the Condition-Based Maintenance Alert screen associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system returns you to the CBM Alert screen with a list of condition-based alerts that meet your search criteria.

Tap any record in the list to review the details for that record.

6. On the Alert tab, review and modify the alert details. Tap the Save button at the top right to save any changes you make on this tab.

Figure 7-4 Condition- Based Maintenance - Alert Tab - Smartphone

Carrier 1:05 PM

< List Details Save

Overload on the Truck
40408 - ForkLift

Alert Response Notes

• Equipment Number
40408

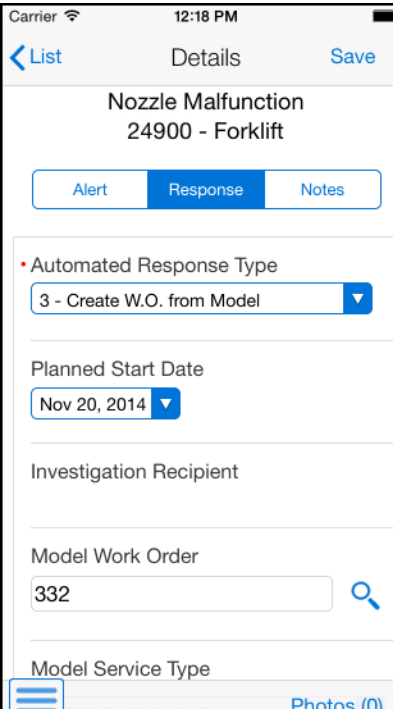
Measurement Location
EG-01 - Engine

• Description
Overload on the Truck

• Alert Level
2 - Alarm

Photos (0)

7. Tap the Response tab to review or update response details for the alert. Tap the Save button at the top right to save any changes you make on this tab.

Figure 7-5 Condition-Based Maintenance - Response Tab - Smartphone

Carrier 12:18 PM

< List Details Save

Nozzle Malfunction
24900 - Forklift

Alert Response Notes

• Automated Response Type
3 - Create W.O. from Model

Planned Start Date
Nov 20, 2014

Investigation Recipient

Model Work Order
332

Model Service Type

Photos (0)

8. Tap the Notes tab to review the existing notes, or to add new notes and tap the Save button. The new note appears at the bottom of the Notes History section after it is saved.
9. To view photos for the selected alert, tap the Photos (#) button at the bottom right. The number on the button represents the number of available photos. The application displays a list of available photos. Tap the photo you want to view.
10. To delete a photo, tap the photo you want to delete, and then tap the Delete button.
11. To add a photo, tap the Add button on the CBM Alert Photos screen, and then select Album or Camera.

To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. To take a new photo, tap the Camera option, and then take a new photo using the device's camera feature. On the New Photo screen, enter a name for the photo and tap the Save button.

Tap the Back button on the CBM Alert Photos screen.

12. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

7.4.2 Adding Condition-Based Alerts Using a Mobile Smartphone

To add condition-based maintenance alerts:

1. Open the application by tapping the CBM Alert icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. Tap the Add icon on the CBM Alert screen.
3. Enter the alert details on the Alert tab of the Details screen.

Equipment Number (Release 9.1 Update)

This is a required field. Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 7.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Number field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Number field to search and select a piece of equipment.

Measurement Location and Description

Select a value from the Measurement Location drop-down that indicates a measurement location on a piece of equipment. You can use this code to indicate where a measurement is taken or where an alert originates from a piece of equipment.

Enter a description for measurement location in the Description field. You must enter a value in the Description field.

Alert Level

Select a level for the alert from the Alert Level drop-down menu. You must select a value in this field.

Alert Status

Select a status for the alert from the Alert Status drop-down menu. If you leave this field blank, the system automatically assigns an open status to the alert.

Event Date/Time

Enter the date on which an event occurred, such as the date of a test reading or the date of a condition-based alarm. This is a required field.

Send Notification Message

Select the radio button to specify that a notification message is sent when a condition-based alert is entered into the system. If you do not select the button, the system does not send a notification message.

The status of radio button can be populated from the processing options or from the information setup in the alert action rules.

Additionally, complete any of the remaining optional fields on the Alert tab, and then tap the Save button at the top right.

Figure 7-6 Add Condition- Based Maintenance Smartphone - Alert tab

The screenshot shows a mobile application interface for adding a condition-based maintenance alert. The top navigation bar includes 'List', 'Details', and 'Save'. Below this is a tabbed interface with 'Alert', 'Response', and 'Notes' tabs. The 'Alert' tab is active. The form contains the following fields:

- Equipment Number:** A text input field containing '1002' with a search icon and a QR code icon to its right.
- Measurement Location:** A dropdown menu with the text '-- Select One --' and a downward arrow.
- Description:** A text input field containing 'New Alert'.
- Alert Level:** A dropdown menu with the text '1 - Warning' and a downward arrow.
- Alert Status:** A dropdown menu with the text '-- Select One --' and a downward arrow.

At the bottom of the screen, there is a hamburger menu icon on the left and a 'Save and Add Photo' button on the right.

- To set up alert action rules to respond to alerts automatically, tap the Response tab.

Automated Response Type

Select a value from the drop-down menu to specify the value for the automated response type for the condition-based alert record. Based on the value you select in this field, the device activates some of the fields for user entry:

- 2: When you specify the response type 2, the device enables the Investigation Recipient field for user entry.
- 3: When you specify the response type 3, the device enables the Model Work Order and Model Service Type fields.
- 4: When you specify the response type 4, the device enables the Service Type field for user entry.

Note: You must enter values in the fields that the device enables based on the response type that you select.

Additionally, complete any of the remaining optional fields on the Response tab, and then tap the Save button at the top right.

Figure 7-7 Add Condition- Based Maintenance Smartphone - Response tab

When you save a new alert, the device displays the CBM Alert screen with the new alert displayed on the top of the list of alerts.

5. Tap the Notes tab to add new notes to the record. To enter a new note, enter text in the New Notes section and tap the Save button. The new note appears at the bottom of the Notes History section after it is saved.
6. To add photos for the new alert, while entering details on the Alert, Response, or Notes tab, tap the Save and Add Photo button at the bottom right of the respective tab to save the record and add photos for the new alert.
7. Tap the Add button on the CBM Alert Photos screen, and then select Album or Camera.

To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. To take a new photo, tap the Camera option, and then take a new photo using the device's camera feature. On the New Photo screen, enter a name for the photo and tap the Save button.

Tap the Back button on the Photos screen to return to the CBM Alert screen.

8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Manage Equipment Mobile Applications

This chapter discusses these topics:

- [Section 8.1, "Manage Equipment Mobile Applications Overview"](#)
- [Section 8.2, "Using the Manage Equipment Mobile Tablet Application"](#)
- [Section 8.3, "Using the Manage Equipment Mobile Smartphone Application"](#)

Important Note: Before you use the mobile applications, Oracle strongly recommends that you have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- Working with Equipment Information in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide
 - Creating Equipment Master Records Manually in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide
 - Creating Asset Identification Information in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide
 - Working with Role-Based Workspaces in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide
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8.1 Manage Equipment Mobile Applications Overview

Equipment Master information is the primary data that is associated with each piece of equipment in the device. The Manage Equipment mobile applications for tablet and smartphone enable you to search for equipment details as a subset of the equipment master information and to add notes. The Manage Equipment application enables you to see the key equipment information. Examples are:

- Equipment details
- Description
- Location information
- Acquired and installation dates

- Status

In the mobile applications for equipment, you can view detailed information, and also update the data in the Equipment Status and Location fields. The device updates the equipment status in the Asset Master File (F1201) and Status History File (F1307) tables, and the location in the F1201 and Location Tracking (F1204) tables.

This table lists the applications that are available to review and update equipment details:

Type of Application	Additional Information
Base EnterpriseOne Application	Use these applications in the JD Edwards EnterpriseOne system to review and update equipment details: <ul style="list-style-type: none"> ■ Work With Equipment Master (P1701) ■ Business Unit Search (P0006S) ■ Address Book Master Search (P0101S) ■ Equipment Detail (P1702E) ■ Equipment Master Address Location (P1704) ■ Address Book (P01012) ■ Equipment Master Location Details Location (P17041) ■ Location Transfer (P12115) ■ PM Backlog (P12071E) ■ Repair History (P48201E) ■ Meter Readings (P12120E)
Tablet Application	Manage Equipment Mobile Tablet Application (M13040) To download the tablet application to your tablet device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Manage Equipment
Smartphone Application	Manage Equipment Mobile Smartphone Application (M13041) To download the smartphone application to your smartphone device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Manage Equipment

8.1.1 Differences and Limitations: Equipment Search Results

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

If the processing options for the mobile applications are not set to determine which version to use for the Work With Equipment Master program (P1701), then the Equipment mobile applications for tablet and smartphone use the ZJDE0002 version of the Work With Equipment Master program.

Barcode Scanning (Release 9.1 Update)

The Manage Equipment mobile tablet application (M13040) and the Manage Equipment smartphone application (M13041) are designed to scan data from a barcode and populate the equipment number in the Equipment Number field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes

that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

8.2 Using the Manage Equipment Mobile Tablet Application

As part of the maintenance technician's role, you need to view and update equipment details. The Manage Equipment tablet application enables you to search the equipment, view details, and update the status and location of equipment. In addition, the Manage Equipment tablet application also enables you to:

- View Preventive Maintenance (PM) backlog details.
- View repair history through equipment work orders.
- View current meter readings and enter either new readings or net increases for a single piece of equipment. You use meter readings to monitor equipment use and to initiate maintenance tasks.
- View or add notes pertaining to a piece of equipment.

Before you can use the application, you must download and install the application from the application store on your tablet device.

(Release 9.1 Update) You can use one of the following options to scan barcodes of equipment number:

- Disable the Bluetooth option in the settings on your device if you want to use the native device camera to scan the barcodes of equipment number.
- Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes of equipment number.

To scan barcodes using the Bluetooth scanning device, you must configure the scanning device to the mobile device.

8.2.1 Setting Processing Options for the Manage Equipment Mobile Tablet Program (M13040)

You use processing options to specify default processing information for a program. Before you use the Equipment application on tablet, you must set the processing options for the application.

8.2.1.1 Versions

1. Equipment Master (P1701) Version

Use this processing option to specify the version of the Work With Equipment Master program that you want to run while running the Manage Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0002 version.

2. Equipment Detail (P17012E) Version

Use this processing option to specify the version of the Equipment Detail program that you want to run while running the Manage Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

3. Location Transfer (P12115) Version

Use this processing option to specify the version of the Location Transfer Location program that you want to run while running the Manage Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

4. Equipment PM Backlog (P12071E) Version

Use this processing option to specify the version of the PM Backlog program that you want to run while running the Manage Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

5. Equipment Repair History (P48201E) Version

Use this processing option to specify the version of the Repair History program that you want to run while running the Manage Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

6. Meter Reading (P12120E) Version

Use this processing option to specify the version of the Meter Readings program that you want to run while running the Manage Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

7. Address Book (P01012) Version

Use this processing option to specify the version of the Address Book program that you want to run while running the Manage Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

8. Equipment Address Location (P1704) Version

Use this processing option to specify the version of the Equipment Address Master Location program that you want to run while running the Manage Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

8.2.2 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Manage Equipment mobile tablet application (M13040) and the Manage Equipment smartphone application (M13041) include the Equipment Number field in the filter screens of the applications. You use the Equipment Number filter to filter records by equipment number.

You can populate the Equipment Number field using the following options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option on your device, the system may disable the device's keyboard.

8.2.3 Reviewing Equipment Details Using the Manage Equipment Mobile Tablet Application

To review equipment:

1. Open the application by tapping the Manage Equip icon on your device, and log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Manage Equipment home screen, enter the description partially or in whole in the Enter Equipment Description field to narrow the search for a specific equipment. Then, tap the Search button next to the Enter Equipment Description field to search for equipment by description. Alternately, you can leave the Enter Equipment Description field empty and tap the Search button to retrieve all equipment. When you click the Search button, the system displays the details of first record in the right pane of the Manage Equipment screen.

To clear the description in the Enter Equipment Description field, tap the Clear button.

3. To search details of an equipment by site, location, or status, tap the Filter button next to the Enter Equipment Description field.

Site

This field retrieves the equipment based on the address book number of the site location.

Enter the address book number in the Site field.

Alternately, tap the Search button next to the Site field, and then tap the Search button on the Address Book Search window. You can also search by entering a description or address book type.

The device displays address book numbers based on your search. Tap the address book number that you want to select.

Location

This field retrieves the equipment based on the current physical location of an asset. Enter a location in the Location field.

Alternately, tap the Search button. Enter a description for location in the Description field, tap the Search button on the Location Search window. The device displays business unit locations based on your search. Tap the business unit that you want to select.

Equipment Status

This field retrieves the equipment list based on the status assigned to the equipment record. To search for equipment by status, tap the Equipment Search drop down menu and select a status. The device retrieves the list of equipment with the selected status.

Equipment Number (Release 9.1 Update)

This field retrieves the equipment list based on the equipment number. Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 8.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Number field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Number field to search and select a piece of equipment.

4. Tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of equipment that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of equipment associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. To review details about a specific equipment record, tap the record from the equipment list on the left pane.

Figure 8–1 Manage Equipment Tablet: Equipment Details

The screenshot displays the 'Manage Equipment' application interface. At the top, the title is 'Manage Equipment' with a 'Save' button on the right. Below the title is a search bar labeled 'Enter Equip Desc' with a magnifying glass icon. The main content area is divided into two columns. The left column is a list of equipment items, with 'Adapter - Gas Equipment 2300' selected and highlighted. The right column shows the details for the selected equipment. At the top of the details section, it says 'Adapter - Gas Equipment 2300'. Below this are five tabs: 'Equipment' (selected), 'PM Backlog', 'Repair History', 'Meter Reading', and 'Notes'. The details are organized into several sections: 'Description 2 Natural Gas', 'Description 3 Field', 'Unit Number 2300A', 'Serial Number GH3451', and 'Parent Number 2000'. There is an 'Equipment Status' dropdown menu currently set to '-- Select One --'. Below these are two columns of fields: 'Date Acquired 1/1/09', 'Installation Date 1/1/09', 'Location Start Date 5/25/11', 'Site Number 4242 - Capital System DO NOT MOD...', and 'Site Coordinates' with a 'Map' link. On the right side of these fields are 'Allow Work Orders' and 'Meter Reading Required', both with checked checkboxes. At the bottom right, there is a 'Location' field with the value '200' and a search icon, and a 'Site Address' section with the text '400 Broadland Road NW Atlanta GA 30341 US' and a 'Map' link. The bottom of the screen shows the Oracle and JD Edwards logos.

6. To update the equipment details, perform these steps:
 - To update the equipment status, tap the Equipment Status drop down menu on the right side of the screen and select a different status.
 - To update the location, select the current location and enter the new location. Alternately, tap the Search button. Enter a description for location in the Description field, tap the Search button on the Location Search window, and then tap the location to update.
 - Tap the Save button.
7. Tap the data in the Site Address section of the screen to use the map or navigational features of your device.
8. To review the Preventive Maintenance (PM) backlog details for the selected piece of equipment, tap the PM Backlog tab.

Note that you cannot use the Manage Equipment application to make any changes to the PM backlog details.

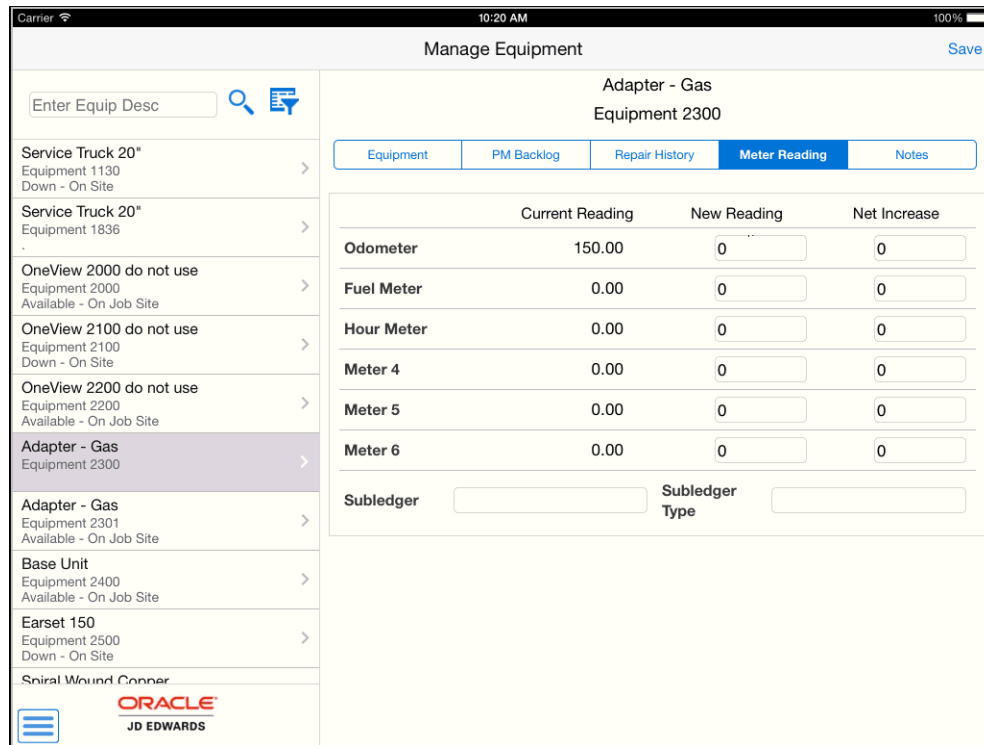
9. To review the repair history of the selected piece of equipment, tap the Repair History tab. The device displays all work orders for the piece of equipment. To narrow the search by work order status, tap the Work Order Status drop down menu, and then tap a status to select. The device displays work orders with the specified status.

Note that you cannot use the Manage Equipment application to make changes to the repair history of an equipment.

10. To review or update the meter reading of the selected equipment, tap the Meter Reading tab.

Enter the new reading and/or the net increase for any of the meters for the piece of equipment, and then tap the Save button.

Figure 8–2 Manage Equipment Tablet: Meter Reading



11. To enter notes and view notes history, tap the Notes tab. To enter a new note, enter text in the New Notes section The new note appears at the bottom of the Notes History section once it is saved.
12. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

8.3 Using the Manage Equipment Mobile Smartphone Application

The Manage Equipment smartphone application (M13041) enables you to search equipment, view details, and update the status and location of equipment on a mobile smartphone.

Before you can use the application, you must download and install the application from the application store on your smartphone device.

8.3.1 Reviewing Equipment Details Using the Equipment Mobile Smartphone Application

To review equipment details:

1. Open the application by tapping the Manage Eq icon on your device, and log in. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Manage Equipment home screen, enter the description partially or in whole in the Enter Equip Desc field to narrow the search for a specific piece of equipment. Then, tap the Search button next to the Enter Equip Desc field to

search for equipment by description. Alternately, you can leave the Enter Equip Desc field empty and tap the Search button to retrieve all equipment.

3. To search details of an equipment by site, location, or status, tap the Filter button next to the Enter Equip Desc field.

Site

This field retrieves the equipment based on the address book number of the site location.

Enter the address book number in the Site field.

Alternately, tap the Search button next to the Site field, and then tap the Search button on the Address Book Search window. You can also search by entering a description or address book type.

The device displays address book numbers based on your search. Tap the address book number that you want to select.

Location

This field retrieves the equipment based on the current physical location of an asset. Enter a location in the Location field.

Alternately, tap the Search button. Enter a description for location in the Description field, tap the Search button on the Location Search window. The device displays business unit locations based on your search. Tap the business unit that you want to select.

Equipment Status

This field retrieves the equipment list based on the status assigned to the equipment record. To search for equipment by status, tap the Equipment Status drop down menu and select a status.

Equipment Number (Release 9.1 Update)

This field retrieves the equipment list based on the equipment number. Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 8.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

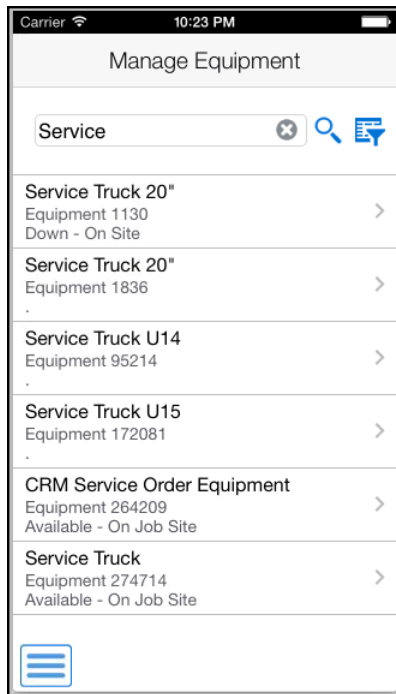
Note: The Equipment Number field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Number field to search and select a piece of equipment.

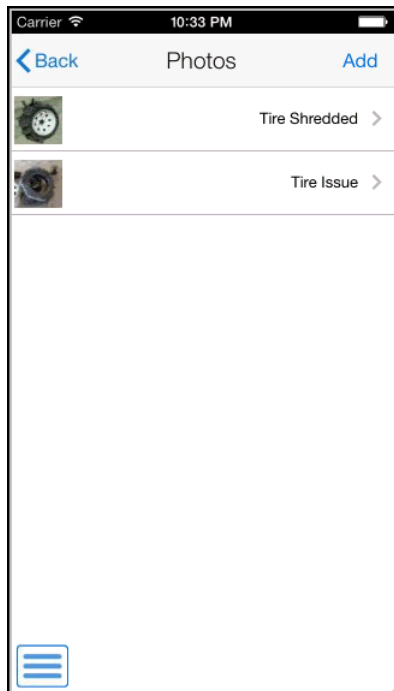
4. To review details about a specific equipment record, tap the record from the equipment list.

Figure 8-3 Manage Equipment: Select Equipment



5. To update the equipment details, perform these steps:
 - To update the equipment status, tap the Equipment Status drop down menu, and then tap a status to select.

Figure 8–5 *Manage Equipment Smartphone: Photo List*



8. To add photos to the equipment record, tap the Add button on the Photos screen. The device displays a popup with two options: Album and Camera.
To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. On the New Photo screen, enter a name for the photo and tap the Save button.
To take a new photo, tap the Camera option to use the device's camera feature.
9. To enlarge the photo, tap the photo twice. To zoom in on the photo, pinch and drag. To zoom out, reverse the drag and pinch motion.

Note: The zoom feature is not available on Android devices.

10. To delete a photo, tap the photo you want to delete. Tap the Delete button on the Photo screen.
To refresh the photo list, tap the Refresh button on the Photos screen.
Tap the List button to return to the Photos screen.
11. Tap the Back button on the Photos screen to return to the Equipment screen.
12. To view and modify notes, tap the Notes tab. Tap the text area and enter or modify notes. Tap the Save button.
13. To return to the home screen of Manage Equipment, tap the Search button on the top left of the screen.
14. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Manage My Work Orders Mobile Applications

This chapter discusses these topics:

- [Section 9.1, "Manage My Work Orders Mobile Applications Overview"](#)
- [Section 9.2, "Setting Up the Manage My Work Orders Mobile Applications"](#)
- [Section 9.3, "Using the Manage My Work Orders Mobile Tablet Application \(M17020\)"](#)
- [Section 9.4, "Using the Manage My Work Orders Disconnected Mobile Tablet Application \(M17026\)"](#)
- [Section 9.5, "Using the Manage My Work Orders Mobile Smartphone Application \(M17010\)"](#)
- [Section 9.6, "Using the Manage My Work Orders Disconnected Mobile Smartphone Application \(M17016\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Understanding Field Service Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
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9.1 Manage My Work Orders Mobile Applications Overview

You use the Manage My Work Orders mobile applications to easily review and update work orders assigned to you. You can use filters to search for work orders. For each work order, you can review equipment information, status and priority of the work order, planned start date, planned completion date, actual finish date, and failure description. You can also review the address and location details of the site where you must perform the work order, and use the device's map and navigational features to locate the site.

Two types of Manage My Work Orders applications are available:

- The Manage My Work Orders mobile applications enable you to manage your work orders while connected to the internet.

- The Manage My Work Orders Disconnected mobile applications enable you to manage your work orders regardless of whether you have internet connectivity. (You can upload your changes when you are reconnected to the internet.)

This table lists the applications that are available to review and update equipment work orders:

Type of Application	Additional Information
Base EnterpriseOne application	To review and update equipment work orders, use these applications in the JD Edwards EnterpriseOne system: <ul style="list-style-type: none"> ■ Field Service Inquiry (P48100) ■ Field Service Revisions (P17100) ■ Work Order Parts Detail (P17730) ■ Work Order Labor Detail (P17732) ■ Work Order Inventory Issues (P31113)
Tablet application - Connected	Manage My Work Orders (M17020) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards My Work Orders
Tablet application - Disconnected	Manage My Work Orders Disconnected (M17026) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards My Work Orders Disconnected
Smartphone application - Connected	Manage My Work Orders (M17010) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards My Work Orders
Smartphone application - Disconnected	Manage My Work Orders Disconnected (M17016) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards My Work Orders Disconnected

9.1.1 Disconnected Updates - Manage My Work Orders Tablet and Smartphone (Release 9.1 Update)

The Manage My Work Orders Disconnected applications enable users to update work orders when they are not connected to the network. All steps for updating your work orders are the same whether you are using the disconnected or the connected applications.

For the disconnected applications, the way in which data is retrieved from, and updated to the EnterpriseOne system is different from the connected applications.

After logging into the application, users must load their mobile device with work order data from the server. This step must be performed while users are connected to the network. They can then remain connected to the network, or they can disconnect, and make changes to their work order records while away from the office. All changes made to the work orders are stored locally on the mobile device.

When the users are done making changes, *and are reconnected to the network*, they can upload their changes back to the EnterpriseOne server. Users cannot perform the upload when disconnected.

To use the disconnected applications, you must be on JD Edwards EnterpriseOne Tools release 9.1.5.3 or later and have the version of the Manage My Work Orders mobile application that supports disconnected processing.

Additionally, be aware that logging into a disconnected application might be slightly different than when logging into an application that does not support disconnected mode. See [Section 3.1.2, "Logging In When In Disconnected Mode \(Release 9.1 Update\)"](#)

9.1.2 Barcode Scanning (Release 9.1 Update)

The Manage My Work Orders tablet application (M17020) and the Manage My Work Orders smartphone application (M17010) are designed to scan data from a barcode and populate the work order number and equipment number in the Work Order and Equipment filter fields. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. These applications do not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

9.2 Setting Up the Manage My Work Orders Mobile Applications

Before using the Manage My Work Orders tablet or smartphone applications, you:

- Set processing options for the Manage My Work Orders mobile applications (M17020, M17026, M17010, and M17016).
- Set processing options for the Field Service Inquiry program (P48100) to display only those work orders that are assigned to you.
- Set processing options for the Work Order Inventory Issues program (P31113) to display the recommended issued quantity for all parts, and to process the issue of parts for all records.
- (Release 9.1 Update) Disable the Bluetooth option in your device's settings if you want to use the native device camera to scan barcodes of work order and equipment. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device on the mobile device.

Support for barcode is available only in the Manage My Work Orders tablet (M17020) and the Manage My Work Orders smartphone (M17010) applications.

9.2.1 Setting Processing Options for the Manage My Work Orders Mobile Tablet Applications (M17020 and M17026)

You use processing options to specify default processing information for a program.

9.2.1.1 Versions

1. Field Service Inquiry (P48100) Version

Use this processing option to specify which version of the Field Service Inquiry program (P48100) the system uses. To process work orders, the mobile tablet applications (M17020 and M17026) use the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

2. Work Order Parts Detail (P17730) Version

Use this processing option to specify which version of the Work Order Parts Detail program (P17730) the system uses. To process work orders, the mobile tablet applications (M17020 and M17026) use the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0002.

3. Work Order Labor Detail (P17732) Version

Use this processing option to specify which version of the Work Order Labor Detail program (P17732) the system uses. To process work orders, the mobile tablet applications (M17020 and M17026) use the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0002.

4. Work Order Inventory Issues (P31113) Version

Use this processing option to specify which version of the Work Order Inventory Issues program (P31113) the system uses. To process work orders, the mobile tablet applications (M17020 and M17026) use the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0002.

9.2.2 Setting Processing Option for the Manage My Work Orders Mobile Smartphone Applications (M17010 and M17016)

You use processing options to specify default processing information for a program.

9.2.2.1 Versions

1. Field Service Inquiry (P48100) Version

Use this processing option to specify which version of the Field Service Inquiry program (P48100) the system uses. To process work orders, the mobile smartphone applications (M17010 and M17016) use the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

9.2.3 Setting Up Processing Options of the Field Service Inquiry Program (P48100) and Work Order Inventory Issues Program (P31113)

You must set up these processing options for the version of the Field Service Inquiry program (P48100) that you specify:

- Work Order Type: Set this processing option to use equipment work orders.
- Only Show User's Work Orders: Set this processing option to display only your work orders.

Note: When you log in to the mobile applications, the system verifies these processing options of the Field Service Inquiry program (P48100) and displays your equipment work orders.

You also set up these processing options for the version of the Work Order Inventory Issues program (P31113) that you specify:

- Issue Material For: Set this processing option to automatically enter the recommended issued quantity for all parts.
- Select All Lines for Issue on Entry: Set this processing option to process issue for all records.

Note: The system uses these processing options of the Work Order Inventory Issues program (P31113) to process and issue parts for the work order.

Note: Oracle recommends that you use the information provided here to set the processing options for your versions of the Field Service Inquiry program (P48100) and Work Order Inventory Issues program (P31113). If you set the processing options differently, the Manage My Work Orders mobile applications will not work as expected.

See:

- "Setting Processing Options for Field Service Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- "Setting Processing Options for the Work Order Inventory Issues Program (P31113)" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

9.2.4 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Work Order and Equipment filters available in the Manage My Work Orders mobile applications enable you to filter work order records by work order and equipment. For the Manage My Work Orders tablet (M17020) and the Manage My Work Orders smartphone (M17010) applications, you have three options to enter data in these filter fields. You can:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note that when you enable the Bluetooth option in your device settings, the system locks the keyboard; you can use the keyboard only after you disable the Bluetooth option.

9.3 Using the Manage My Work Orders Mobile Tablet Application (M17020)

The Manage My Work Orders mobile tablet application (M17020) enables you to:

- Review details of equipment work orders that are assigned to you.
- Update work order status.
- Enter the actual date that you completed a work order.
- Review parts and labor available for a work order.
- Issue parts required to complete a work order.
- Enter notes, and review previous notes.

Before you can use the application, you must download and install the application from the application store on your device.

9.3.1 Managing Work Orders Using a Mobile Tablet Application (M17020)

To manage work orders:

1. Open the application by tapping the My WO icon on your device, and then log in. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the My Work Orders screen, review the work orders.

Figure 9–1 My Work Orders - Work Order Tab: Tablet

The screenshot shows the 'My Work Orders' application interface on a tablet. The top bar displays 'Carrier', '10:58 AM', and '100%' battery. The main header is 'My Work Orders' with a 'Save' button on the right. Below the header, there is a list of work orders on the left and a detailed view of a selected work order on the right. The selected work order is 'Repair/Replace Brake Drums' with 'Work Order # 455110'. The detailed view includes tabs for 'Work Order', 'Parts', 'Labor', and 'Notes'. The 'Work Order' tab is active, showing fields for Equipment (Service Truck 20*), Priority (Normal), Current Status (45 Material Issued), Planned Start Date (9/20/13), Planned Complete Date (12/22/13), Actual Finish Date (Aug 2, 2014), and Failure Description (BRAKE NOISE ISSUE). On the right side of the detailed view, there is a 'Map Equipment Location' section with a 'Site' dropdown set to 'Tractors Galore', 'Contact Name' 'MIKE SHANAHAN', 'Phone' '(720) 201-2356', and 'Site Address' '7700 Technology Way, Denver CO 80237, US'. The Oracle JD Edwards logo is visible at the bottom left of the screen.

3. To filter work orders, tap the filter icon at the top of the work order list, and complete any of these fields to narrow your search:

Start Date

Tap the From and To drop-down menus and specify the work order start date range that the system uses to search for work orders.

Status

Tap the From and To drop-down menus and specify the status range that the system uses to search for work orders.

Priority

Tap the Priority drop-down menu and specify the priority that the system uses to search for work orders.

Work Order (Release 9.1 Update)

Enter data in the Work Order field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a work order.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Work Order field. The system launches the device camera and you can scan the barcode of the work order.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Work Order field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

Equipment Number (Release 9.1 Update)

Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 9.2.4, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#)

4. In the Filters window, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of work orders that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of work orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, tap Clear. You can then enter new filter values or leave them blank, and then tap Apply.

5. To review and update a work order, tap the work order from the list of work orders.
The system displays work order header information and four tabs: Work Order, Parts, Labor, and Notes. The Work Order tab is open by default.
6. To change the status of the work order, tap the Current Status drop-down menu and select a status.
7. You can also update the status of the work order by tapping the Advance Status button.

Note: Based on the work order activity rules, the system displays the Advance Status button with the next status. If work order activity rules are not applicable for your work order, or if the status is complete and no more statuses are available, this button does not appear.

8. To select the date that you completed the work order, tap the Actual Finish Date drop-down menu.
9. To use the device's map and navigational features, tap the data in the Map and Site Address sections of the form.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

10. To review available parts and to issue parts for the work order, tap the Parts tab. To issue parts that have not been issued, tap the Issue Parts option at the top left of the parts list. The system updates the Actual Quantity field. Note that if the Estimated Quantity and the Actual Quantity for all parts is the same, the Issue Parts option is disabled.

If parts record does not exist for the work order, the Parts screen will be blank, and the Issue Parts option is not displayed.

11. To review labor details for the work order, tap the Labor tab.
12. To enter notes and view notes history, tap the Notes tab. To enter new notes, tap the New Notes field, and enter your note.

Note: The tablet application retrieves only the first text attachment available in the media object of the Field Service Revisions program (P17100), and displays the retrieved text in the Notes History field.

When you enter text in the New Notes field and tap the Save button, the system adds the new text to the text in the Notes History field, and leaves the New Notes field blank.

13. To view photos of the work order, or the equipment associated with the work order, tap the Photos button.

When you tap the Photos button, the system displays two options: Work Order and Equipment. The number displayed on each option represents the total number of photos for the work order or the equipment.

14. To view existing photos of the work order and to add new photos, tap the Work Order option.

To view photos of the equipment, tap the Equipment option.

A list of photos appear as thumbnails in the left pane. In the right pane, the system displays the photo that is first on the list.

To view a photo, tap the photo thumbnail. To delete a photo, tap the Delete button. On the confirmation window that opens, tap to confirm that you are deleting the photo. The system removes the photo from the list of photos. Note that you can only delete photos that have not yet been updated to the EnterpriseOne system. The delete option is not available for photos that exist in the EnterpriseOne system. Those photos can only be deleted directly in the EnterpriseOne system.

To add a photo to the work order, tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the work order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature. You can manually enter a name for the photo, or the system will assign a number to the photo.

Note: You cannot add or delete photos when you select the Equipment option. The equipment photos that you see in the tablet application are retrieved from the EnterpriseOne system.

15. You can add a description of the photo. The system adds the photo to the list of photos, and increments the number of photos available by 1 (One).
16. To save and update the work order, tap the Save button.

If you navigate away from the work order record without saving your updates, you will lose unsaved changes.
17. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

9.4 Using the Manage My Work Orders Disconnected Mobile Tablet Application (M17026)

The Manage My Work Orders Disconnected mobile tablet application (M17026) enables you to review and update your equipment work orders when you are not connected to the network. The system saves your updates locally, and you can upload them to the EnterpriseOne system when you are connected to the network.

You can perform these updates offline:

- Update work order status.
- Enter the actual date that you completed a work order.
- Review parts and labor available for a work order.
- Issue parts required to complete a work order.
- Enter notes, and review previous notes.

Before you can use the application, you must download and install the application from the application store on your device.

9.4.1 Managing Work Orders Using a Mobile Tablet Disconnected Application (M17026)

To manage work orders when you are offline:

1. Open the application by tapping the My WO Tablet DCN icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

You must complete this step while connected to the network.

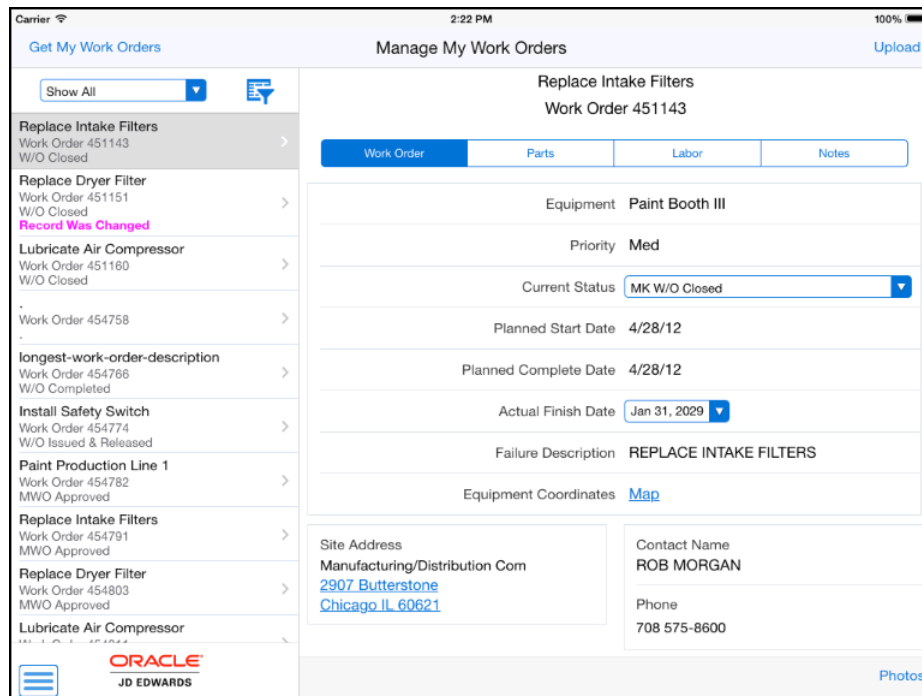
See the following for information about logging in while disconnected:
[Section 3.1.2, "Logging In When In Disconnected Mode \(Release 9.1 Update\)"](#)

Note that if you are using an iOS device, you will see the number of changed records as a notification on the icon on your device. If you are using an Android device, this number is not displayed.

2. From the My Work Orders screen, click the Get My Work Orders button at the top left to load the application with data.

You must be connected to your network to load work order data. If you are not connected, the Get My Work Orders button is disabled.

Figure 9–2 Work Order Tab: Tablet Disconnected



3. To filter work orders, tap the filter icon at the top of the work order list, and complete any of these fields to narrow your search:

Start Date

Tap the From and To drop-down menus and specify the work order start date range that the system uses to search for work orders.

Status

Tap the From and To drop-down menus and specify the status range that the system uses to search for work orders.

Priority

Tap the Priority drop-down menu and specify the priority that the system uses to search for work orders.

Work Order (Release 9.1 Update)

Tap the Work Order field and enter data that the system uses to search for work orders.

Equipment Number (Release 9.1 Update)

Tap the Equipment Number field and enter data that the system uses to search for work orders.

Additionally, you can filter your search by the upload status of the records.

4. In the Filters window, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of work orders that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of work orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, tap Clear. You can then enter new filter values or leave them blank, and then tap Apply.

5. To review and update a work order, tap the work order from the list of work orders.

The system displays work order header information and four tabs: Work Order, Parts, Labor, and Notes. The Work Order tab is open by default.
6. To change the status of the work order, tap the Current Status drop-down menu and select a status.
7. You can also update the status of the work order by tapping the Advance Status button.

Note: Based on the work order activity rules, the system displays the Advance Status button with the next status. If work order activity rules are not applicable for your work order, or if the status is complete and no more statuses are available, this button does not appear.

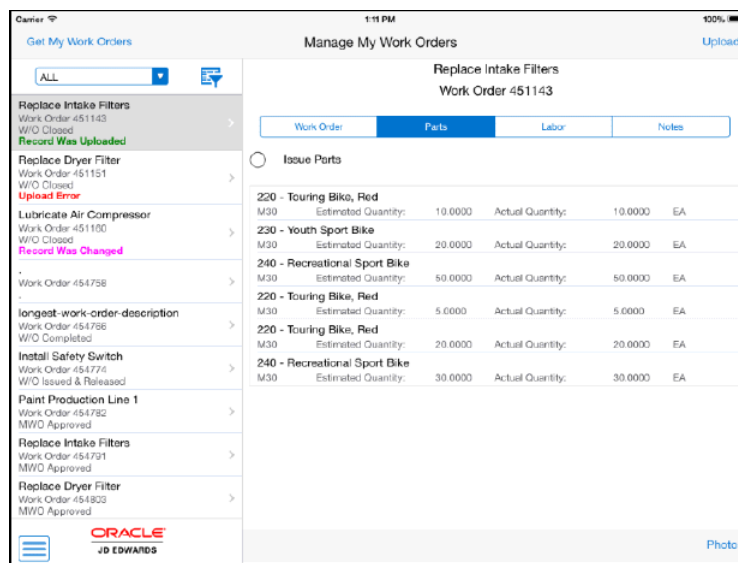
8. To select the date that you completed the work order, tap the Actual Finish Date drop-down menu.

- To use the device's map and navigational features, tap the data in the Map and Site Address sections of the form.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

- To review available parts and to issue parts for the work order, tap the Parts tab. To issue parts that have not been issued, tap the Issue Parts option at the top left of the parts list. The system updates the Actual Quantity field. Note that if the Estimated Quantity and the Actual Quantity for all parts is the same, the Issue Parts option is disabled.

Figure 9–3 Parts Tab: Tablet Disconnected



If parts record does not exist for the work order, the Parts screen will be blank, and the Issue Parts option is not displayed.

- To review labor details for the work order, tap the Labor tab.
- To enter notes and view notes history, tap the Notes tab. To enter new notes, tap the New Notes field, and enter your note. When you exit out of the field, the system saves the changes locally, and commits the changes when you upload the work order.

Note: The tablet application retrieves only the first text attachment available in the media object of the Field Service Revisions program (P17100), and displays the retrieved text in the Notes History field.

When you enter text in the New Notes field and exit out of the note field, the system leaves the new text in the New Notes field until it has been uploaded to the EnterpriseOne system. After a successful upload, the new text then appears in the Note History field.

- To view photos of the work order, or the equipment associated with the work order, tap the Photos button.

When you tap the Photos button, the system displays two options: Work Order and Equipment. The number displayed on each option represents the total number of photos for the work order or the equipment.

14. To view existing photos of the work order and to add new photos, tap the Work Order option.

To view photos of the equipment, tap the Equipment option.

A list of photos appear as thumbnails in the left pane. In the right pane, the system displays the photo that is first on the list.

To view a photo, tap the photo thumbnail. To delete a photo, tap the Delete button. On the confirmation window that opens, tap to confirm that you are deleting the photo. The system removes the photo from the list of photos. Note that you can only delete photos that have not yet been updated to the EnterpriseOne system. The delete option is not available for photos that exist in the EnterpriseOne system. Those photos can only be deleted directly in the EnterpriseOne system.

To add a photo to the work order, tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the work order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature. You can manually enter a name for the photo, or the system will assign a number to the photo.

Note: You cannot add or delete photos when you select the Equipment option. The equipment photos that you see in the tablet application are retrieved from the EnterpriseOne system.

15. You can add a description of the photo. The system adds the photo to the list of photos, and increments the number of photos available by 1 (One).
16. When you return to the Manage My Work Orders screen, note that an upload status message of "Record Was Changed" now appears on the work order record.
17. If you made a change to a work order, and then do not want that change saved to the database, you can either:
 - Change the value back to the original value, and upload the record when you are connected to the network again.
 - Leave the incorrect value as it is, and when you are connected to the network again, click Get My Work Orders. This will overwrite the changes you made locally with the data from the EnterpriseOne database. If you choose this method, *all local changes will be overwritten*, including changes to other work orders.
18. To upload your changes to the EnterpriseOne network, you must first connect to the network. When you are connected, the system enables these buttons:
 - Get My Work Orders
Tap this button to overwrite the data on your device with the data from the EnterpriseOne database. If you tap this button before uploading your changes, *all of your locally-saved changes will be lost*, and overwritten with the data from EnterpriseOne.

- Upload

Tap this button to upload the changes to the EnterpriseOne database. The system displays a list of changed work orders. Tap Upload again to continue. Once the upload completes, the application changes the message in the list to *Record Was Uploaded* (green) or *Upload Error* (red).
- 19. If your record was in error, tap the record to view details about the error. The system displays the error information at the top of the screen, and indicates the tab(s) on which the error is located.

Fix the error, and then repeat the upload process to save your changes to the EnterpriseOne database.
- 20. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

9.5 Using the Manage My Work Orders Mobile Smartphone Application (M17010)

The Manage My Work Orders smartphone application (M17010) enables you to review details of equipment work orders that are assigned to you.

Before you can use the application, you must download and install the application from the application store on your device.

9.5.1 Managing Work Orders Using a Mobile Smartphone Application (M17010)

To manage work orders:

1. Open the application by tapping the My WO icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the My Work Orders screen, review the work orders. To refresh the data on the screen, swipe down on the screen.
3. To filter work orders, tap the filter icon at the top of the work order list, and complete any of these fields to narrow your search:

Start Date

Tap the From and To drop-down menus and specify the work order start date range that the system uses to search for work orders.

Status

Tap the From and To drop-down menus and specify the status range that the system uses to search for work orders.

Priority

Tap the Priority drop-down menu and specify the priority that the system uses to search for work orders.

Work Order (Release 9.1 Update)

Enter data in the Work Order field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a work order.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Work Order field. The system launches the device camera and you can scan the barcode of the work order.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Work Order field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

Equipment Number (Release 9.1 Update)

Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 9.2.4, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#)

4. In the Filters screen, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of work orders that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

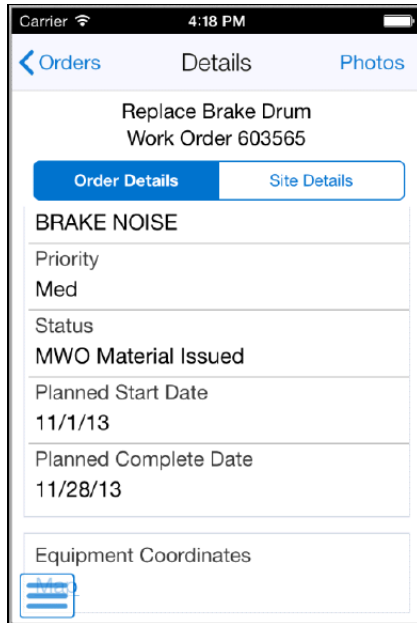
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of work orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

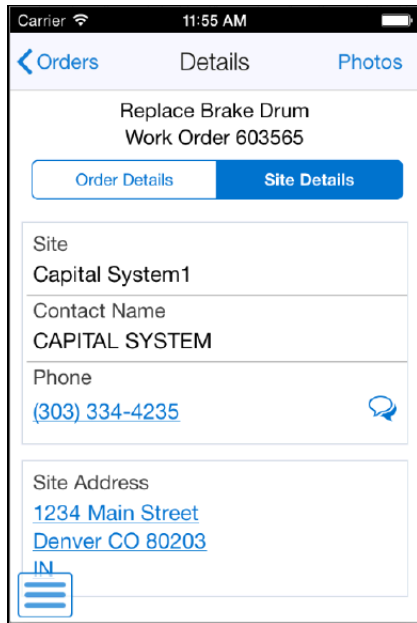
5. To review a work order, tap the work order from the list of work orders.

Figure 9–4 Order Details Tab: Smartphone



The system displays work order header information and two tabs: Order Details and Site Details. The Order Details tab is open by default. To use the device's map feature, tap the Map link in the Equipment Coordinates section of the screen.

Figure 9–5 Site Details Tab: Smartphone



6. To view location details, tap the Site Details tab. To use the device's navigational feature, tap the Site Address section of the screen.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

7. To call the customer, tap the phone number. To text the customer, tap the text icon on the right.
8. To view photos of the work order, or the equipment associated with the work order, tap the Photos button.

When you tap the Photos button, the system displays two options: Work Order and Equipment. The number displayed on each option represents the total number of photos for the work order or the equipment.

9. To view existing photos of the work order and to add new photos, tap the Work Order option.

To view photos of the equipment, tap the Equipment option.

A list of photos appear as thumbnails in the left pane. In the right pane, the system displays the photo that is first on the list.

To view a photo, tap the photo thumbnail.

10. You can zoom in and zoom out photos for display. To zoom in, pinch and drag the part of the photo that you want to zoom in. To zoom out, drag and pinch the photo.
11. To delete a photo, tap the Delete button. On the confirmation window that opens, tap to confirm that you are deleting the photo. The system removes the photo from the list of photos.
12. To add a photo to the work order, tap the Add button. The system displays two options: Album and Camera.
To attach an existing photo from your device's photo gallery to the work order, tap the Album option.
To take a new photo, tap the Camera option to use the device's camera feature.

Note: You cannot add or delete photos when you select the Equipment option. The photos that you see in the Equipment Photos screen are retrieved from the EnterpriseOne system.

13. You can add a description of the photo. To save the photo, tap the Save button. The system adds the photo to the list of photos, and increments the number of photos available by 1 (One).

Note: The system displays work order photos from the media object in the Field Service Revisions program (P17100), and equipment photos from the media object in the Work with Equipment Master program (P1701).

14. To go back to the Order Details or Site Details screen, tap the Details button.
15. To go back to the list of work orders, tap the Orders button.
16. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

9.6 Using the Manage My Work Orders Disconnected Mobile Smartphone Application (M17016)

The Manage My Work Orders Disconnected smartphone application (M17016) enables you to review and update your equipment work orders even when you are not connected to the network. The system saves your updates locally, and you can upload them to the EnterpriseOne system when you are connected to the network.

You can perform these updates offline:

- Enter new notes.
- Add photos.

Before you can use the application, you must download and install the application from the application store on your device.

9.6.1 Managing Work Orders Using a Mobile Smartphone Disconnected Application (M17016)

To manage work orders when you are offline:

1. Open the application by tapping the My WO Phone DCN icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

You must complete this step while connected to the network.

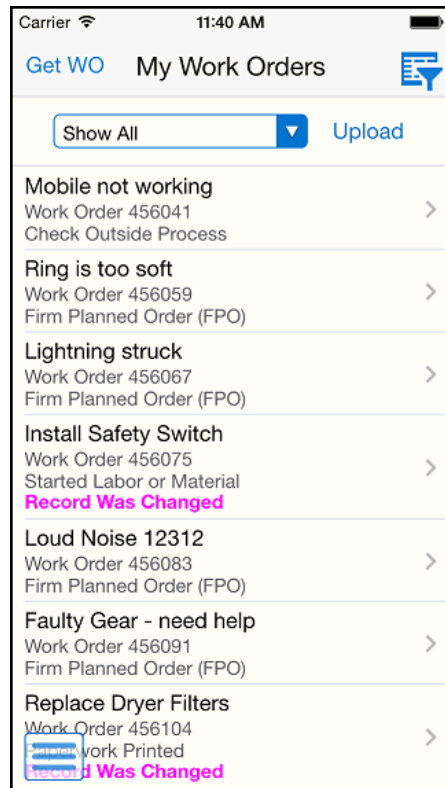
See the following for information about logging in while disconnected:

[Section 3.1.2, "Logging In When In Disconnected Mode \(Release 9.1 Update\)"](#)

Note that if you are using an iOS device, you will see the number of changed records as a notification on the icon on your device. If you are using an Android device, this number is not displayed.

2. From the My Work Orders screen, click the Get WO button at the top left to load the application with data.

You must be connected to your network to load work order data. If you are not connected, the Get WO button is disabled.

Figure 9–6 My Work Orders: Phone Disconnected

3. To filter work orders, tap the filter icon at the top of the work order list, and complete any of these fields to narrow your search:

Start Date

Tap the From and To drop-down menus and specify the work order start date range that the system uses to search for work orders.

Status

Tap the From and To drop-down menus and specify the status range that the system uses to search for work orders.

Priority

Tap the Priority drop-down menu and specify the priority that the system uses to search for work orders.

Work Order (Release 9.1 Update)

Tap the Work Order field and enter data that the system uses to search for work orders.

Equipment Number (Release 9.1 Update)

Tap the Equipment Number field and enter data that the system uses to search for work orders.

Additionally, you can filter your search by the upload status of the records.

4. In the Filters window, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of work orders that are displayed based on your filter values.

- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of work orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, tap Clear. You can then enter new filter values or leave them blank, and then tap Apply.

5. To review a work order, tap the work order from the list of work orders.

The system displays work order header information and three tabs: Order, Site, and Notes. The Order tab is open by default.

6. To use the device's map and navigational features, tap the Map link in the Equipment Coordinates section of the screen.
7. To view location details, tap the Site tab. To use the device's navigational feature, tap the Site Address section of the screen.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

8. To call the customer, tap the phone number. To text the customer, tap the text icon on the right.
9. To enter notes and view notes history, tap the Notes tab. To enter new notes, tap the New Notes field, and enter your note. When you exit out of the field, the system saves the changes locally, and commits the changes when you upload the work order.

Note: The smartphone application retrieves only the first text attachment available in the media object of the Field Service Revisions program (P17100), and displays the retrieved text in the Notes History field.

When you enter text in the New Notes field and exit out of the note field, the system leaves the new text in the New Notes field until it has been uploaded to the EnterpriseOne system. After a successful upload, the new text then appears in the Note History field.

10. To view photos of the work order, or the equipment associated with the work order, tap the Photos button.

When you tap the Photos button, the system displays two options: Work Order and Equipment. The number displayed on each option represents the total number of photos for the work order or the equipment.

11. To view existing photos of the work order and to add new photos, tap the Work Order option.

To view photos of the equipment, tap the Equipment option.

A list of photos appear as thumbnails in the left pane. In the right pane, the system displays the photo that is first on the list.

To view a photo, tap the photo thumbnail. To delete a photo, tap the Delete button. On the confirmation window that opens, tap to confirm that you are deleting the photo. The system removes the photo from the list of photos. Note that you can only delete photos that have not yet been updated to the EnterpriseOne system. The delete option is not available for photos that exist in the EnterpriseOne system. Those photos can only be deleted directly in the EnterpriseOne system.

To add a photo to the work order, tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the work order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature. You can manually enter a name for the photo, or the system will assign a number to the photo.

Note: You cannot add or delete photos when you select the Equipment option. The equipment photos that you see in the tablet application are retrieved from the EnterpriseOne system.

12. You can add a description of the photo. The system adds the photo to the list of photos, and increments the number of photos available by 1 (One).
13. When you return to the My Work Orders screen, note that an upload status message of "Record Was Changed" now appears on the work order record.
14. If you made a change to a work order, and then do not want that change saved to the database, you can either:
 - Change the value back to the original value, and upload the record when you are connected to the network again.
 - Leave the incorrect value as it is, and when you are connected to the network again, click Get WO. This will overwrite the changes you made locally with the data from the EnterpriseOne database. If you choose this method, *all local changes will be overwritten*, including changes to other work orders.
15. To upload your changes to the EnterpriseOne network, you must first connect to the network. When you are connected, the system enables these buttons:
 - Get WO
Tap this button to overwrite the data on your device with the data from the EnterpriseOne database. If you tap this button before uploading your changes, *all of your locally-saved changes will be lost*, and overwritten with the data from EnterpriseOne.
 - Upload
Tap this button to upload the changes to the EnterpriseOne database. The system displays a list of changed work orders. Tap Upload again to continue. Once the upload completes, the application changes the message in the list to *Record Was Uploaded* (green) or *Upload Error* (red).
16. If your record was in error, tap the record to view details about the error. The system displays the error information at the top of the screen, and indicates the tab(s) on which the error is located.

Fix the error, and then repeat the upload process to save your changes to the EnterpriseOne database.

17. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Meter Reading Mobile Applications

This chapter discusses these topics:

- [Section 10.1, "Meter Reading Mobile Applications Overview"](#)
- [Section 10.2, "Setting Up the Meter Reading Tablet Application"](#)
- [Section 10.3, "Using the Meter Reading Mobile Tablet Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Entering Speed Meter Readings in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide](#)
-
-

10.1 Meter Reading Mobile Applications Overview

Meter reading applications enable you to enter or update meter information for equipment. You use meter readings to monitor equipment use and initiate maintenance tasks that are based on accumulated statistical units, such as miles. You use the Meter Reading mobile application for tablet (M12120U1) to quickly enter meter readings for multiple pieces of equipment. The system displays the meters based on the settings in the processing options. You can enter each meter reading either as a net change or as a current reading.

Entering meter readings for the same pieces of equipment in the same order on a routine basis is a common practice. To do this, you set up the template for the applicable equipment in the order that you select. The Meter Reading mobile application for tablet enables you to preload a list of equipment to enter meter readings, by specifying your template.

This table lists the applications that are available to enter meter readings:

Type of Application	Additional Information
Base EnterpriseOne Application	Use the Speed Meter Readings Program (P12120U) in the JD Edwards EnterpriseOne system to enter meter readings for multiple pieces of equipment.

Type of Application	Additional Information
Tablet Application	Meter Reading (M12120U1) To download the application to your tablet, search on the following text in the application store. <ul style="list-style-type: none"> ■ JD Edwards Meter Reading

Before using the Meter Reading tablet application, you must first set the processing options.

10.1.1 Differences and Limitations: Meter Reading Results

The mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software. In the Meter Reading for tablet application, you do not have an option to restrict the display of meters. When you select a template, the system displays all meters associated with that template.

The Meter Entry Date is always set to the system date. This application does not display subledger and subledger type details.

10.2 Setting Up the Meter Reading Tablet Application

Before you can use the Meter Reading application on a mobile tablet device, you must set the processing options for the Meter Reading program (M12120U1). The Meter Reading application for tablet looks at some of the processing options on version ZJDE0001 of P12120U to determine how the mobile application processes meter reading data, and which template to display on the mobile application. If the processing options for the mobile application are not set to determine which version of the P12120U program to use, then the Meter Reading applications for tablet uses the ZJDE0001 version of the P12120U program.

10.2.1 Setting Processing Options for the Meter Reading for Tablet Application (M12120U1)

This section discusses the processing options on P12120U that the mobile meter reading process uses:

10.2.1.1 Defaults

6. Equipment Template Name

Use this processing option to specify the default equipment template name. When you open the Meter Reading application, the system assigns this value to the Template Name field.

10.2.1.2 Edits

1. Tolerance Level

Use this processing option to specify whether the system displays a tolerance level warning. Enter the specific percentage difference in meter readings that the system uses to signal the warning.

For example, if you enter 5 in this field, then the system issues a warning if the new net increase amount differs by more than five percent from the net increase amount of

the last meter entry. If you leave this processing option blank, the system does not check for tolerance levels.

Note: You cannot override this warning. You must enter a value within the specified tolerance level.

10.3 Using the Meter Reading Mobile Tablet Application

The Meter Reading tablet application enables you to update meter readings for one or more meters displayed for the template that you specify.

Before you can use the application, you must download and install the application from the application store on your device.

10.3.1 Updating Meter Readings Using the Meter Reading Mobile Tablet Application

To enter meter reading:

1. Open the application by tapping the Meter Reading icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)

2. The system displays the meter readings based on the value in the Equipment Template Name processing option.

Alternately, tap the Template Name drop down on the left pane of the Template Meter Reading home screen. Then, tap the template to select.

The system displays the details of first record in the right pane of the Template Meter Reading screen.

Figure 10–1 *Template Name: Tablet*

Carrier 10:03 AM 100%

Template Meter Reading Auto Save

Template Name
DISPLAY ALL METER

Chrysler Minivan
Equipment 1002

Chrysler Minivan
Equipment 1002
Meter Entry Date - 01/23/2014

	Current Reading	New Reading	Net Increase
Odometer	0	0	0
Fuel Meter	0	0	0
Hour Meter	0	0	0
Meter 4	0	0	0
Meter 5	0	0	0
Meter 6	0	0	0

Chrysler Minivan
Equipment 1002 >

Engine, Diesel, Cummins
Equipment 1013 >

Ace Truck, 3/4 Ton Panel
Equipment 1018 >

Service Truck 20"
Equipment 1130 >

Backhoe, Caterpillar 426
Equipment 1300 >

Forklift for P6
Equipment 22000 >

Forklift
Equipment 24900 >

Crown RC 9900 - Lift Truck
Equipment 35051 >

Crown RC 9900 - Lift Truck
Equipment 35060 >

Crown PT321 - End Ride Truck
Equipment 35107 >

ORACLE
JD EDWARDS

Reset Save

3. The system retrieves the list of equipment and details of the meters associated with the template. Tap the equipment that you want to select.
4. To update a meter reading, tap the particular value and enter the new value. You can enter a new value in either the New Reading or the Net Increase column. For example, to update the New Reading for Fuel Meter, tap the value in the second column for the Fuel Meter row and type the new value. Tap the Save button.

When you enter a value in one of the fields under the New Reading or the Net Increase column, the system automatically calculates and displays value in the other field. For example, if you enter a value in the New Reading field, the system automatically calculates the value in the Net Increase field based on the values in the Current Reading and the New Reading fields.

If the Auto Save is on and you tap a different equipment from the equipment list on the left pane of the window, the application automatically saves the changes that you make. However, if you change the template from the Template Name drop down without saving the changes, the system reverts back to the previous template and equipment until you perform a manual save or a cancel.

To toggle the Auto Save setting, swipe the Auto Save option on the top right of the screen left or right.

Note: The application displays warnings at these instances:

- With Auto Save off, when you make any changes to meter reading and exit the screen without saving the changes that you made, the application displays this warning:

Previous data has not been saved

- If you save the data with a net increase amount more than the percent specified in the tolerance level for the program, the system displays a warning message. For example, if the tolerance level is five and you enter the new net increase amount more than five percent from the net increase amount of the last meter entry, the system displays this warning:

Warning: Quality Tolerance Level.

- If the net increase is negative, the application displays this warning message when you save the record:

Warning: Negative Net Change.

5. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Review Team Work Orders Mobile Applications

This chapter discusses these topics:

- [Section 11.1, "Review Team Work Orders Mobile Applications Overview"](#)
- [Section 11.2, "Setting Up the Review Team Work Orders Mobile Applications"](#)
- [Section 11.3, "Using the Review Team Work Orders Mobile Tablet Application \(M17040\)"](#)
- [Section 11.4, "Using the Manage Work Orders Mobile Smartphone Application \(M17042\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Understanding Field Service Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
 - "Updating Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
-
-

11.1 Review Team Work Orders Mobile Applications Overview

You use the Review Team Work Orders mobile applications to easily review and update work orders. You can use filters to search for work orders. For each work order, you can review order information, status and priority of the work order, planned start date, planned completion date, actual finish date, and failure description. You can also review the address and location details of the site where you must perform the work order, and use the device's map and navigational features to locate the site.

This table lists the applications that are available to review and update work orders:

Type of Application	Additional Information
Base EnterpriseOne application	Use these applications in the JD Edwards EnterpriseOne system to review and update work orders: <ul style="list-style-type: none"> ■ Field Service Inquiry (P48100) ■ Field Service Revisions (P17100) ■ Work Order Parts Detail (P17730) ■ Work Order Labor Detail (P17732) ■ Work Order Inventory Issues (P31113)
Tablet application	Review Team Work Orders (M17040) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Review Team Work Orders
Smartphone application	Review Team Work Orders (M17042) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Review Team Work Orders

Before using the Review Team Work Orders tablet or smartphone application, you must perform the following setup tasks:

- Set processing options for the Review Team Work Orders mobile applications (M17040 and M17042).
- Set processing options for the Field Service Inquiry program (P48100) to display equipment work orders.

11.2 Setting Up the Review Team Work Orders Mobile Applications

Before you use the Review Team Work Orders mobile applications, verify that the processing options for the applications are set correctly. The processing options for the mobile applications specify the versions of the base EnterpriseOne applications that the mobile applications use.

11.2.1 Setting Processing Options for the Review Team Work Orders Mobile Tablet Application (M17040)

You use processing options to specify default processing information for a program.

11.2.1.1 Versions

1. Field Service Inquiry (P48100) Version

Use this processing option to specify the version of the Field Service Inquiry program (P48100) that the tablet application uses to process work order information. If you leave this option blank, the system uses version ZJDE0002.

2. Work Order Parts Detail (P17730) Version

Use this processing option to specify the version of the Work Order Parts Detail program (P17730) that the tablet application uses to process work order parts information. If you leave this option blank, the system uses version ZJDE0002.

3. Work Order Labor Detail (P17732) Version

Use this processing option to specify the version of the Work Order Labor Detail program (P17732) that the tablet application uses to process work order labor information. If you leave this option blank, the system uses version ZJDE0002.

11.2.2 Setting Processing Options for the Review Team Work Orders Mobile Smartphone Application (M17042)

You use processing options to specify default processing information for a program.

11.2.2.1 Versions

1. Field Service Inquiry (P48100) Version

Use this processing option to specify the version of the Field Service Inquiry program (P48100) that the smartphone application uses to process work order information. If you leave this option blank, the system uses version ZJDE0002.

11.3 Using the Review Team Work Orders Mobile Tablet Application (M17040)

The Review Team Work Orders mobile tablet application (M17040) enables you to review details of work orders. You can update the status of the work order, enter the date that you completed the work order, review parts and labor available for the work order, enter notes, view photos, and review previous notes.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Manage WO icon and log in.

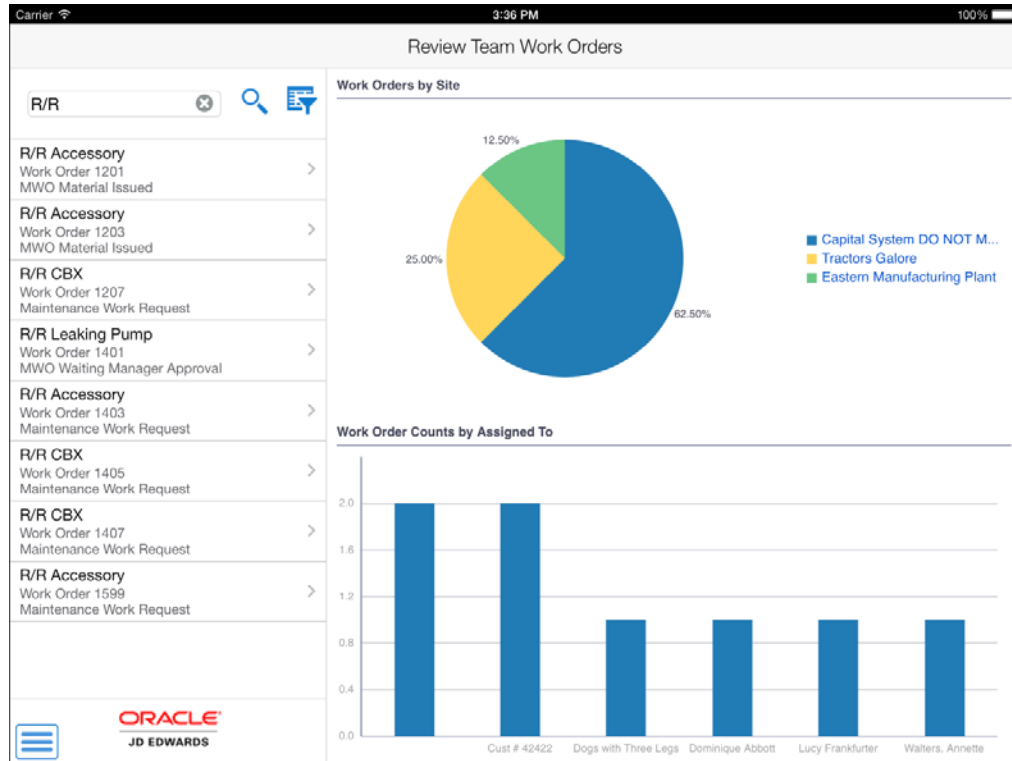
11.3.1 Managing Team Work Orders Using a Mobile Tablet Application (M17040)

To review and manage team work orders:

1. Open the application by tapping the Manage WO icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Manage Work Orders screen, enter an order description and tap the search icon.

Note: If you do not enter an order description, the system displays all work orders as retrieved by the Field Service Inquiry program (P48100) in the EnterpriseOne application.

Figure 11–1 Manage Work Orders - Home screen: Tablet



- To filter work orders, tap the filter icon at the top of the work order list.

Start Date

Tap the From and To dropdown menus and specify the work order start date range that the system uses to search for work orders.

Site

Enter a value (address book number) that identifies a site.

Alternately, you can tap the search and select icon to search for a site.

Use the Search Description field and the Search Type dropdown menu to search for a site. Tap the Search button.

Select a site from the list of sites.

Supervisor

Enter a value (address book number) that identifies a supervisor.

Assigned To

Enter a value (address book number) that identifies the technician to whom the work order is assigned.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for work orders.

Priority

Select a value that indicates the relative priority of a work order with respect to other orders.

Work Order Number

Enter the work order number that the system uses to search for work orders.

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of work orders that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

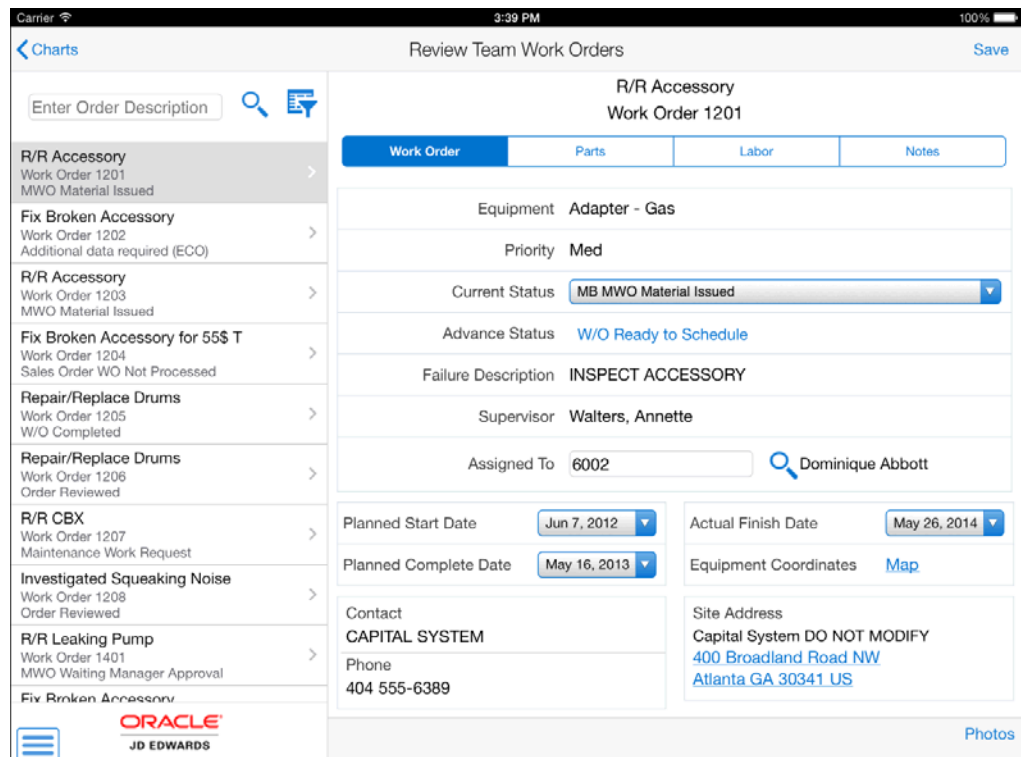
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of work orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. To review and update a work order, tap the work order from the list of work orders.

Figure 11–2 Work Order tab: Tablet



The system displays work order description and work order number in the header and four tabs: Work Order, Parts, Labor, and Notes.

6. To change the status of the work order, tap the Current Status dropdown menu and select a status.

You can also update the status of the work order by tapping the Advance Status button.

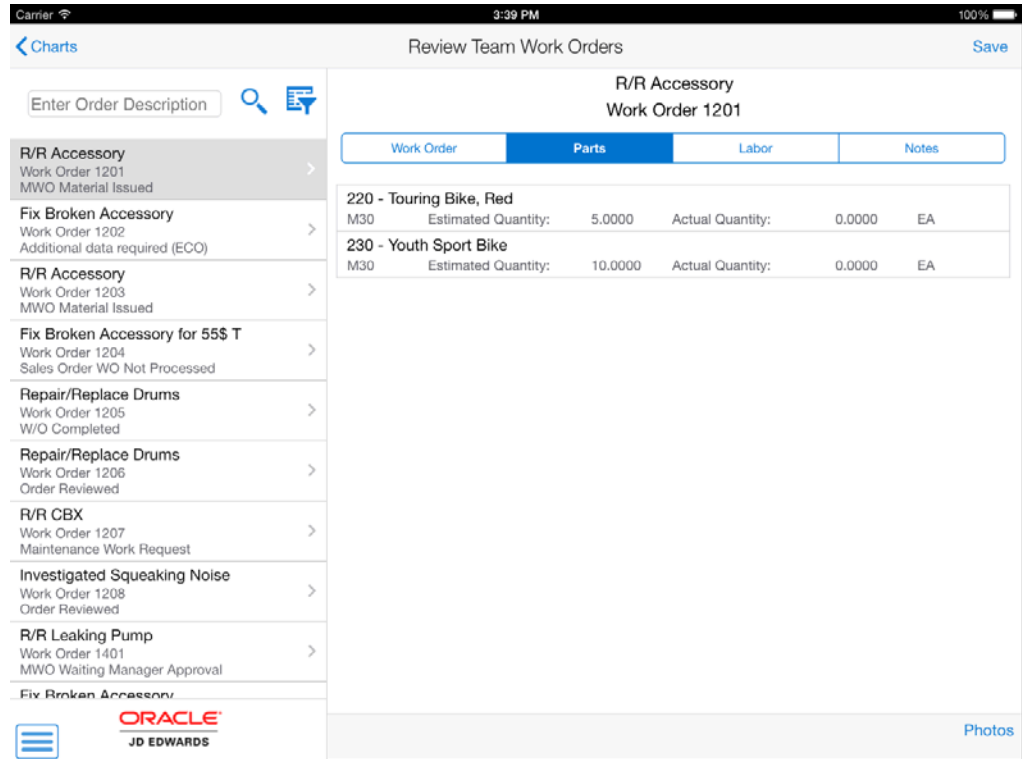
Note: Based on the work order activity rules, the system displays the Advance Status button with the next status. If work order activity rules are not applicable for the work order, or if the status is complete and no more statuses are available, the system does not display this button.

7. To assign the work order to a different technician, enter the address book number of the technician in the Assigned To field or select a technician by tapping the Assigned To search icon.
8. To change the planned start and finish dates, tap the Planned Start Date and Planned Finish Date dropdown menus.
9. To select the date that you completed the work order, tap the Actual Finish Date dropdown menu.
10. To use the device's map and navigational features to locate the equipment, tap the Map hyperlink.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

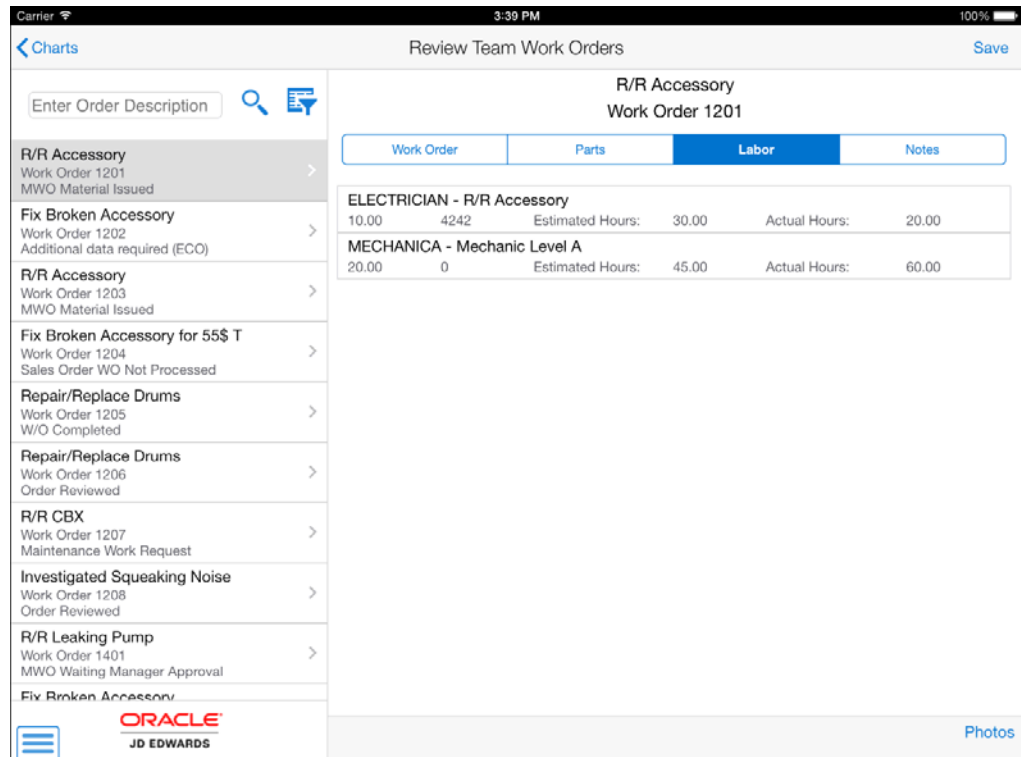
11. To use the device's map and navigational features to locate the site address, tap the data in the Site Address section of the screen.
12. To review available parts, tap the Parts tab.

Figure 11–3 Parts tab: Tablet



13. To review labor details for the work order, tap the Labor tab.

Figure 11–4 Labor Tab: Tablet

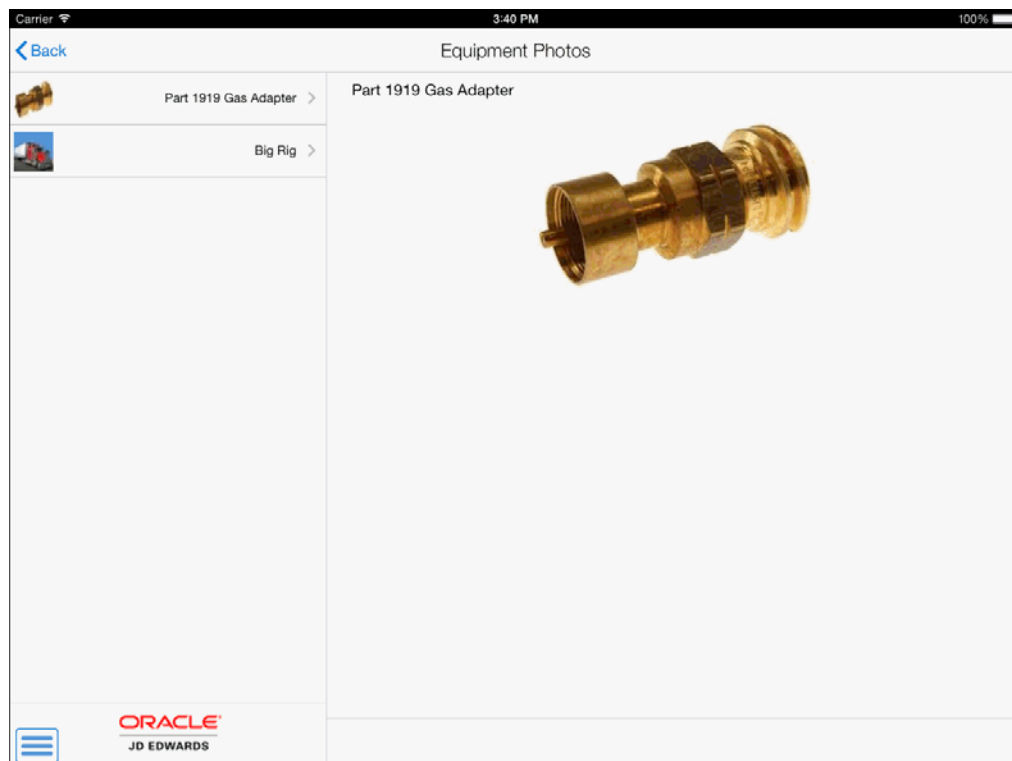


14. To enter notes and view notes history, tap the Notes tab. To enter new notes, tap the New Notes field.

Note: When you enter text in the New Notes field and tap the Save button, the system adds the new text to the text in the Notes History field, and leaves the New Notes field blank.

15. To save and update the work order, tap the Save button.
If you navigate away from the work order record without saving your updates, you lose unsaved changes.
16. To view work order and equipment photos, tap the Photos button.
17. To view, add or delete work order photos, tap the Work Order Photos option.
18. To view equipment photos, tap the Equipment Photos option.

Figure 11–5 Equipment Photos: Tablet



19. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

11.4 Using the Manage Work Orders Mobile Smartphone Application (M17042)

The Manage Work Orders smartphone application (M17042) enables you to review details of equipment work orders.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Manage WO icon and log in.

11.4.1 Managing Work Orders Using a Mobile Smartphone Application (M17042)

To manage work orders:

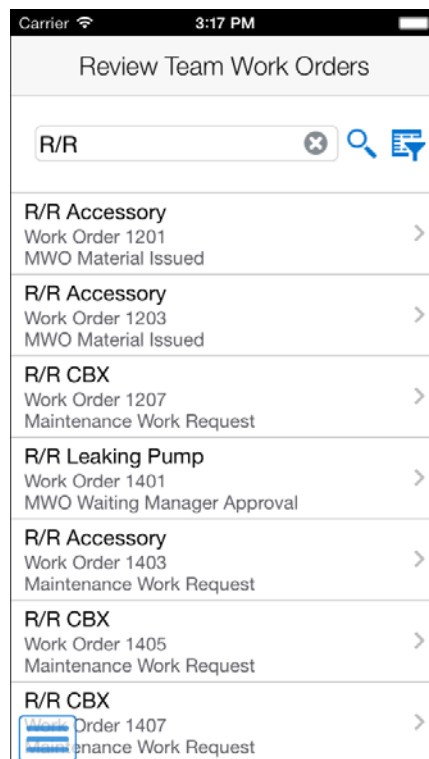
1. Open the application by tapping the Manage WO icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. On the Manage Work Orders screen, enter an order description and tap the search icon.

Note: If you do not enter an order description, the system displays all work orders as retrieved by the Field Service Inquiry program (P48100) in the EnterpriseOne application.

Figure 11–6 Manage Work Orders - Home screen: Smartphone



3. To filter work orders, tap the filter icon at the top of the work order list.

Start Date

Tap the From and To dropdown menus and specify the work order start date range that the system uses to search for work orders.

Site

Enter a value (address book number) that identifies a site.

Alternately, you can tap the search and select icon to search for a site.

Use the Name field and the Search Type dropdown menu to search for a site. Tap the Search button.

Select a site from the list of sites.

Supervisor

Enter a value (address book number) that identifies a supervisor.

Assigned To

Enter a value (address book number) that identifies the technician to whom the work order is assigned.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for work orders.

Priority

Select a value that indicates the relative priority of a work order with respect to other orders.

Work Order Number

Enter the work order number that the system uses to search for work orders.

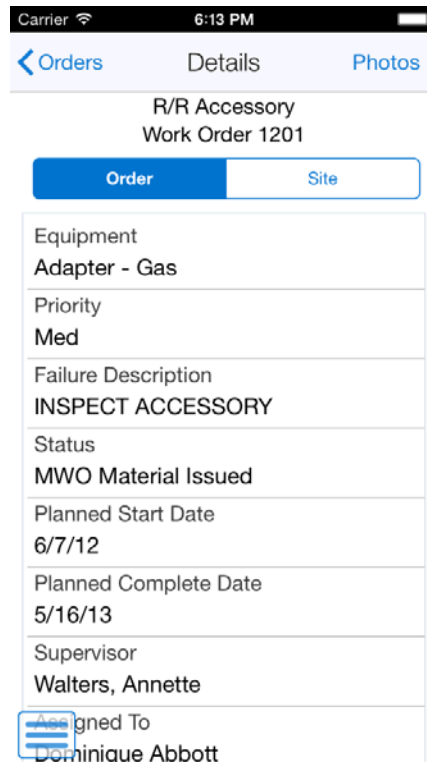
4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of work orders that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of work orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. To review a work order, tap the work order from the list of work orders.

Figure 11-7 Order tab: Smartphone

The system displays work order description and work order number in the header and two tabs: Order and Site.

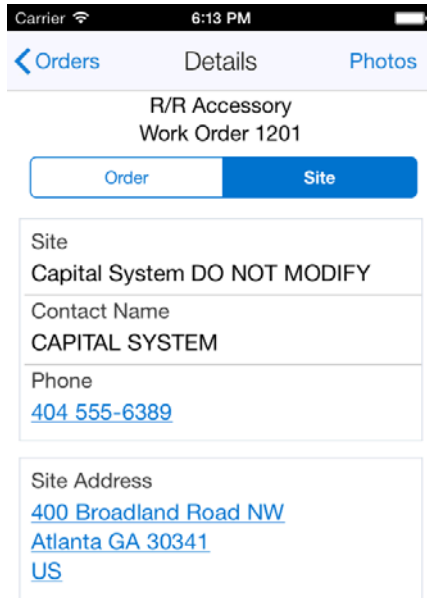
Scroll down to view additional work order information.

- To use the device's map and navigational features to locate the equipment, tap the Map hyperlink.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

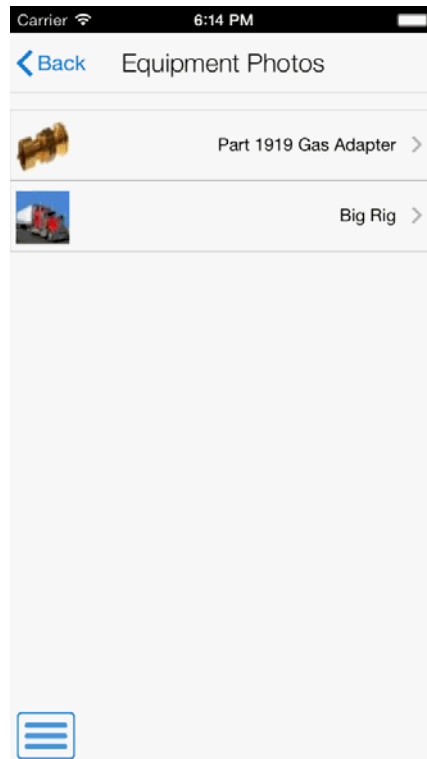
- To review site information, tap the Site tab.

Figure 11–8 Site tab: Smartphone



8. To call the contact, tap the phone number.
9. To use the device's map and navigational features to locate the site address, tap the data in the Site Address section of the screen.
10. To view photos of the work order or the equipment associated with the work order, tap the Photos button. The number displayed on the Photos button represents the total number of photos related to the work order and the associated equipment.
11. To view, add or delete work order photos, tap the Work Order Photos option.
The system displays the photos of the work order as icons.
To view a photo, tap the photo icon.
12. To view equipment photos, tap the Equipment Photos button.

Figure 11–9 Equipment Photos: Smartphone



The system displays the photos of equipment as icons.

To view a photo, tap the photo icon.

13. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Part II

Customer Relationship Management

This part contains the following chapters:

- [Chapter 12, "Create Service Orders Mobile Application"](#)
- [Chapter 13, "Manage Cases Mobile Application"](#)
- [Chapter 14, "Manage Customer Equipment Mobile Applications"](#)
- [Chapter 15, "Manage My Service Orders Mobile Applications"](#)
- [Chapter 16, "Quick Case Entry Mobile Application"](#)
- [Chapter 17, "Review Cases Mobile Application"](#)
- [Chapter 18, "Review Team Service Orders Mobile Applications"](#)
- [Chapter 19, "Service Order Time Entry Mobile Applications"](#)

Create Service Orders Mobile Application

This chapter discusses these topics:

- [Section 12.1, "Create Service Orders Mobile Application Overview"](#)
- [Section 12.2, "Setting Up the Create Service Orders Mobile Tablet Application"](#)
- [Section 12.3, "Using the Create Service Orders Mobile Tablet Application"](#)

Important Note: Before you use the mobile applications, Oracle strongly recommends that you have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Understanding Work Orders in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide](#)
 - [Creating Work Orders Using the Work Order Entry Programs \(P48201/P17714\) in the JD Edwards EnterpriseOne Applications Service Management Implementation Guide](#)
-
-

12.1 Create Service Orders Mobile Application Overview

The Create Service Orders mobile application for tablet enables you to review and update existing service orders entered by you, and to add service orders. The application enables you to see service order details, such as:

- Service order description
- Equipment number
- Branch/Plant number
- Failure description
- Customer number
- Site number
- Supervisor number

In the mobile application for Create Service Orders, you can view detailed information, update notes, and also update the data in these fields:

- Equipment number
- Branch Plant

- Assigned To number
- Customer number
- Site number
- Supervisor number
- Priority
- Requested Finish Date

When you enter or update a service order, the device stores the data in the Work Order Master File table (F4801).

This table lists the applications that are available to review and update equipment details:

Type of Application	Additional Information
Base EnterpriseOne application	Use this application in the JD Edwards EnterpriseOne system to review and update service order details: <ul style="list-style-type: none"> ■ Work Order Revision (P17714)
Tablet application	Create Service Orders (M177141) To download the tablet application to your tablet device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Create Service Orders

12.1.1 Differences and Limitations: Create Service Orders

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The Create Service Orders mobile application uses your login ID to search for service orders you enter. After you launch the mobile application, the system displays all your service orders. You can search for specific orders and filter orders from your list.

When you work with notes for service orders, the Create Service Orders mobile application uses the existing text attachments that are read-only. If you add any text to the existing notes, the device appends the new text to the existing text attachments for notes. You cannot change the already existing notes for any service order.

Barcode Scanning (Release 9.1 Update)

The Create Service Orders mobile application (M177141) is designed to scan data from a barcode and populate the equipment number in the Equipment Number field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

12.2 Setting Up the Create Service Orders Mobile Tablet Application

Before you can use the Create Service Orders application on a mobile tablet device, you: must

- Set processing options for the Create Service Orders mobile application (M177141).
The Create Service Orders application for tablet looks at some of the processing options of P17714, P48022, and P17012S programs to determine how the mobile application processes data while you add your service orders.
- (Release 9.1 Update) Disable the Bluetooth option in your device's settings if you want to use the native device camera to scan barcodes of equipment number. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device to the mobile device.

12.2.1 Setting Processing Options for the Service WO Tablet Program (M177141)

You use processing options to specify default processing information for a program.

12.2.1.1 Versions

1. Work Order Revisions (P17714) Version

Use this processing option to specify the version of the Work Order Revisions program that you want to run while running the Create Service Orders mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

2. Search for Work Orders (P48022) Version

Use this processing option to specify the version of the Search for Work Orders program that you want to run while running the Create Service Orders mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

3. Equipment Search/Select (P17012S) Version

Use this processing option to specify the version of the Equipment Search/Select program that you want to run while running the Create Service Orders mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

12.2.2 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Create Service Orders mobile application (M177141) includes the Equipment Number field in two locations in the app. One is in the filters screen, and another is in the screen that displays when you add a new service order record. You use the Equipment Number filter to filter records by equipment number. When you create a new service order record using the Create Service Orders mobile application (M177141), you must enter the equipment number in the Equipment Number field.

You can populate the Equipment Number field (in the filter screen, as well as in the add new service order screen) using three options:

- Use the keyboard on your mobile device to manually enter the data.

- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note that when you enable the Bluetooth in your device settings, the system locks the keyboard and you can use the keyboard only after you disable the Bluetooth option.

12.3 Using the Create Service Orders Mobile Tablet Application

The Create Service Orders tablet application enables you to search the service orders, view details, and update the branch/plant and address book details of service orders. In addition, the Create Service Orders tablet application enables you to:

- Add new service orders.
- Add, delete, or modify photos for service orders.
- View photos for equipment associated to service orders.
- View or append notes pertaining to a service order.

Before you use the Create Service Orders tablet application, you must download and install the application from the application store on your tablet device.

12.3.1 Adding Work Orders Using the Create Service Orders Mobile Tablet Application

To add service orders:

1. Open the application by tapping the Service WO icon on your device, and log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

Figure 12–1 My Service Orders Screen

The screenshot displays the 'Create Service Orders' mobile application interface. The top status bar shows 'Carrier', '12:23 pm', and '100%' battery. The main title is 'Create Service Orders' with a 'Save' button in the top right. Below the title, the selected service order is 'Service Order 637298'. The interface is split into two panes. The left pane contains a list of service orders, each with a title, service order number, and 'Order Reviewed' status. The right pane shows the 'Service Order Details' for the selected order, with a 'Notes' tab. The details include: Service Order Description (Repair refrigerator), Equipment Number (24740), Branch Plant (M30), Failure Description (FAILED), Customer Number (4242), Site Number (4242), Assigned To Number (4242), Supervisor Number (4242), Priority (Med), and Requested Finish Date (07-Mar-2014). The Oracle JD Edwards logo is at the bottom left, and a 'Photos' button is at the bottom right.

Service Order Title	Service Order Number	Status
Repair refrigerator	637298	Order Reviewed
Repair television	637280	Order Reviewed
Replace charger	637271	Order Reviewed
Replace battery	637263	Order Reviewed
BMW service	637255	Order Reviewed
Upgrade Mac	637247	Order Reviewed
Bike service	637239	Order Reviewed
Reboot Mac	637221	Order Reviewed
Desc	635508	Order Reviewed
New issue1	634177	Order Reviewed
Desc	634100	Order Reviewed

Field	Value
Service Order Description	Repair refrigerator
Equipment Number	24740
Branch Plant	M30
Failure Description	FAILED
Customer Number	4242
Site Number	4242
Assigned To Number	4242
Supervisor Number	4242
Priority	Med
Requested Finish Date	07-Mar-2014

2. Tap the Add button on the top right hand side of your left pane. Based on the setting in the processing options, the device retrieves values in the Customer Number, Site Number, Assigned To Number, and Supervisor Number fields. You can add a service order using these values or you can clear these values and enter new values for your service order.

To clear the default values on the Service Order Details tab, tap the menu button on the top right hand side of the screen. This button gives two options: Clear and Defaults. Tap the Clear button to clear the values or tap the Defaults button to restore default values.

Figure 12–2 Service Order Details: Default

The screenshot displays the 'Create Service Orders' mobile application interface. On the left, there is a list of service orders, each with a title, service order number, and 'Order Reviewed' status. On the right, the 'Service Order Details' tab is active, showing a form with the following fields and values:

- Service Order Description:** (Empty text field)
- Equipment Number:** (Text field with search and QR code icons)
- Branch Plant:** (Text field with search icon)
- Failure Description:** (Empty text field)
- Customer Number:** 4242 (Text field with search icon and 'Capital System' label)
- Site Number:** 4242 (Text field with search icon and 'Capital System' label)
- Assigned To Number:** 4242 (Text field with search icon and 'Capital System' label)
- Supervisor Number:** 4242 (Text field with search icon and 'Capital System' label)
- Priority:** Med (Dropdown menu)
- Requested Finish Date:** 07-Mar-2014 (Dropdown menu)

The Oracle JD Edwards logo is visible at the bottom left, and 'Save and Add Photo' is at the bottom right.

- Enter values in these fields on the Service Order Details tab:

Service Order Description

Specify the description for the service order. You must enter a value in this field.

Equipment Number (Release 9.1 Update)

Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 12.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Branch Plant

Specify the branch plant for the service order.

Alternately, tap the Search button next to the Branch Plant field, and then tap the button on the Branch Plant window. You can also search by entering a description in the Description field.

The device displays branch plants based on your search. Tap the branch plant that you want to select.

Failure Description

Specify the failure description for the service order.

Customer Number

Specify the address book number for the customer for the service order. Based on the setting in the processing option, the device by default has this number. You can change the number by entering a different address book number in the Customer Number field.

Alternately, tap the Search button next to the Customer Number field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Site Number

Specify the address book number for the site for the service order. Based on the setting in the processing option, the device by default has this number. You can change the number by entering a different address book number in the Site Number field.

Alternately, tap the Search button next to the Site Number field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Assigned To Number

Specify the Assigned To value for the service order. Based on the setting in the processing option, the device by default has this number. You can change the number by entering a different address book number in the Assigned To field.

Alternately, tap the Search button next to the Assigned To field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Supervisor Number

Specify the address book number for the supervisor for the service order. Based on the setting in the processing option, the device by default has this number. You can change the number by entering a different address book number in the Supervisor Number field.

Alternately, tap the Search button next to the Supervisor Number field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Priority

Select a priority for the service order from the dropdown menu.

Note: The device defaults the Requested Finish Date to the system date. If required, you can change this date.

4. Tap the Save button to save the service order.

To save the service order and add photos for the service order, tap the Save and Add Photo button. After you tap this button, the device takes you to Service Order Photos screen to add photos for the service order.

5. To add photos of the service order, tap the Add button.

The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the service order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature.

You can add a description of the photo.

6. The system adds the photo to the Photos screen, and displays the number of photos available for the service order on the Photos button.
7. Tap the Status Update tab to update service order status information. You can update the date and time information and add a remark for the service order.

You can update the equipment status and children status for the equipment in the Equipment Status Information section of the Status Update tab.

Note: The device displays the Equipment Status Information section only if you enter a value in the Equipment Number field on the Service Order Details tab for the specific order.

Figure 12–3 Status Update Screen

The screenshot displays the 'Create Service Orders' application interface. On the left, a list of service orders is shown, including 'Repair car', 'Repair refrigerator', 'Repair television', 'Replace charger', 'Replace battery', 'BMW service', 'Upgrade Mac', 'Bike service', 'Reboot Mac', 'Desc', and 'New issue1'. The right side of the screen is the 'Status Update' form, which is currently selected. The form includes a 'Service Order Details' tab, a 'Status Update' tab, and a 'Notes' tab. The 'Work Order Status Information' section contains a 'Beginning Date and Time' dropdown menu set to '07-Mar-2014 12:06 pm', a 'Status' dropdown menu set to 'Order Reviewed', and a 'Remark' text field. The 'Equipment Status Information' section contains a 'Current Equipment Status' field set to 'blank default', a 'New Status' dropdown menu set to '-- Select One --', and an 'Update Children Status' radio button. The bottom of the screen features the Oracle JD Edwards logo and a 'Save and Add Photo' button.

8. To enter notes for the service order, tap the Notes tab. Tap the New Notes field to enter new notes.
9. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

12.3.2 Reviewing or Modifying Work Orders Using the Create Service Orders Mobile Tablet Application

To review or modify service orders:

1. To review or update a service order, tap the service order that you want to modify from the service order list.
2. To search orders by status, priority, or order date, tap the Filter button in the left pane of the My Service Work Orders screen.

Status

This field retrieves the service orders based on the status of the orders.

Select status in the From and To dropdown menus.

The device displays service orders based on your search. Tap the service order that you want to select.

Priority

This field retrieves the service orders based on the priority of the orders. Select a priority from the Priority dropdown menu.

The device displays service orders based on your search. Tap the order that you want to select.

Order Date

This field retrieves the service orders based on the specified date range. To search for orders by date range, specify a date range in the From and To fields. The device retrieves the orders within the specified date range.

Equipment Number (Release 9.1 Update)

To filter service order records by equipment, enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 12.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

3. In the Filters screen, to discontinue the search and to go back to the list of service orders, tap the Cancel button.

To delete the filter values you specified, and to enter new filter values, tap the Clear button.

To continue the search by using the filter values that you specified, tap the Apply button. Tapping the Apply button takes you to the My Service Orders screen that displays service orders based on your filter values.

4. To select a service order, tap the order from the order list on the left pane.

Figure 12–4 Service Order Details

5. To update the service order details, perform these steps:
 - To update the equipment number, tap the Equipment Number field on the right side of the screen. You can use the Visual Assist icon to search for a value and return it to the Equipment Number field, or you can manually enter an equipment number in the field.
 - To update the site number, select the site number, and then enter the new site number. Alternately, you can use the Visual Assist icon to search for a value and return it to the Site Number field.
 - Similarly, update branch plant, assigned to number, supervisor number, customer number, priority, or requested finish date.
 - Tap the Save button.
6. Tap the Save button to save the service order.
7. To view or add photos, tap the Photos button at the bottom of the screen. The system displays two options: Service Order Photos and Equipment Photos. Tap the option that you want to select.
8. To view photos of the associated equipment, tap the Equipment Photos link.
To view or add photos for the service order, tap the Service Order Photos link.
To attach an existing photo from your device's photo gallery to the service order, tap the Album option.
To take a new photo, tap the Camera option to use the device's camera feature.
You can add a description of the photo.
9. To enter notes and review existing notes, tap the Notes tab. Tap the New Notes field to enter new notes. The system appends the new notes to the previous notes that display in the Notes History section.

- 10.** To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Manage Cases Mobile Application

This chapter discusses these topics:

- [Section 13.1, "Manage Cases Mobile Application Overview"](#)
- [Section 13.2, "Setting Up the Manage Cases Mobile Smartphone Application \(M17510E\)"](#)
- [Section 13.3, "Using the Manage Cases Mobile Smartphone Application \(M17510E\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Managing Cases" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
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13.1 Manage Cases Mobile Application Overview

You use the Manage Cases mobile application (M17510E) to review your cases and to update cases. You can update the failure description, equipment, and site for a case. You can search for cases from your list of cases and filter cases from your list. You can view photos associated with the case, add new photos to the case, and delete existing photos.

This table lists the applications that are available for reviewing and updating cases:

Type of Application	Additional Information
Base EnterpriseOne application	<p>To review and update cases, use these applications in the JD Edwards EnterpriseOne system:</p> <ul style="list-style-type: none"> ■ Work with Case program (P17500) ■ User Defined Codes program (P0004A) ■ Case Update program (P90CG501) ■ Case Entry program (P17501E) ■ Equipment Master Address Locations program (P1704)

Type of Application	Additional Information
Smartphone application	Manage Cases (M17510E) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Manage Cases

Before using the Manage Cases mobile application, you must set up the processing options for the Manage Cases mobile application (M17510E).

13.1.1 Differences and Limitations: Manage Cases

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The Manage Cases mobile application uses your login ID to search for cases you enter. After you log in to the smartphone application, your address number is populated in the Assignee filter field, and only your assigned cases are displayed. You can search for specific cases and filter cases from your list.

When you search for cases in the Work With Cases program (P17500), you can specify the search criteria across all cases to which you have access. Therefore, your search results in the mobile application can differ from the search results in the base application.

Barcode Scanning (Release 9.1 Update)

The Manage Cases mobile application (M17510E) is designed to scan data from a barcode and populate the equipment number in the Equipment field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

13.2 Setting Up the Manage Cases Mobile Smartphone Application (M17510E)

Before using the Manage Cases mobile smartphone application (M17510E), you must set up the processing option of the application in the JD Edwards EnterpriseOne system. You use the processing option to specify the version of the base application that you want to use.

Before you set up the processing option for the M17510E program, review the processing options for the Work With Case program (P17500). You review these processing options to verify the validity of the options in the specified version when you process case data by using the mobile device.

See: "Setting Up Processing Options for the Work With Case Program (P17500)" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*

(Release 9.1 Update) You can use one of the following options to scan barcodes of equipment number:

- Disable the Bluetooth option in the settings on your device if you want to use the native device camera to scan the barcodes of equipment number.
- Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes of equipment number.

To scan barcodes using the Bluetooth scanning device, you must configure the scanning device to the mobile device.

13.2.1 Setting Processing Option for the Manage Cases Mobile Smartphone Application (M17510E)

You use processing options to specify default processing information for a program.

13.2.1.1 Versions

1. Work With Case (P17500) Version

Use this processing option to specify which version of the Work With Case program (P17500) the system uses. To process cases, the Manage Cases smartphone application (M17510E) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

2. Case Update (P90CG501) Version

Use this processing option to specify which version of the Case Update program (P90CG501) the system uses. To process cases, the Manage Cases smartphone application (M17510E) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

3. Equipment Address Location (P1704) Version

Use this processing option to specify which version of the Equipment Address Location program (P1704) the system uses. To process cases, the Manage Cases smartphone application (M17510E) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

4. User Defined Codes (P0004A) Version

Use this processing option to specify which version of the User Defined Codes program (P0004A) the system uses. To process cases, the Manage Cases smartphone application (M17510E) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

5. Case Entry (P17501E) Version

Use this processing option to specify which version of the Case Entry program (P17501E) the system uses. To process cases, the Manage Cases smartphone application (M17510E) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

13.2.2 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Manage Cases smartphone application (M17510E) includes the Equipment field in two locations in the application. One is in the filter screen and another is in the Case Detail screen that displays when you select any case. You use the Equipment filter to filter records by equipment number. You can modify the equipment number of a case in the Equipment field that is displayed in the Case Detail screen.

You can populate the Equipment field (in the filter screen as well as in the Case Detail screen of a case) using the following options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option on your device, the system may disable the device's keyboard.

13.3 Using the Manage Cases Mobile Smartphone Application (M17510E)

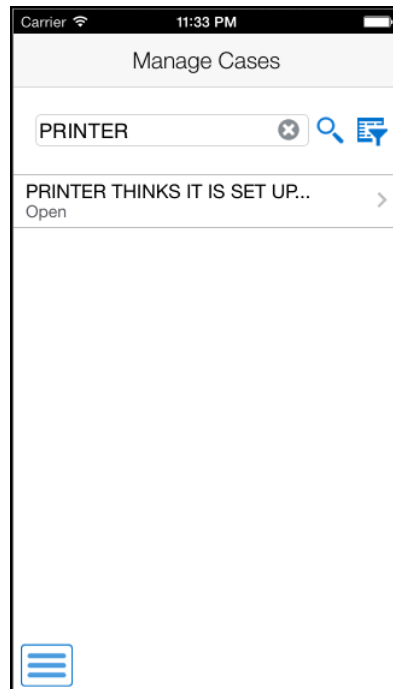
The Manage Cases mobile smartphone application enables you to review your cases and update the cases.

Before you can use the application, you must download and install the application from the application store on your device.

13.3.1 Reviewing and Updating Cases By Using a Mobile Smartphone Application

To review and update cases:

1. Open the application by tapping the Manage Case icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Manage Cases screen, review the cases on the list. For each case, the system displays the failure description and case status.
3. To search for a case, tap the Enter Issue Description search field, enter the issue description, and then tap the search icon. The search pulls up all cases that satisfy the search text.

Figure 13–1 Search for Cases

4. To clear the search text that you entered and to go back to the list of cases, tap the clear icon inside the search field.
5. To filter cases, tap the filter icon that is next to the search icon.

Begin Date

Tap the From and To dropdown menus and specify the begin date range that the system uses to search for cases.

Assignee

Your address book number will be populated in this field by default. To search cases for a different assignee, you can use the search icon to search for a value and return it to the Assignee field. You can also manually enter the address book number of an assignee in the field.

Equipment (Release 9.1 Update)

Enter data in the Equipment field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search icon to search for an equipment. In the Equipment search screen, enter a description of the equipment in the Equipment field, and then tap the Search button. The system pulls up all records that satisfy the search text; select a piece of equipment. To discontinue the search and to go back to the Filters screen, tap the Cancel button.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Equipment field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 13.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See [Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide](#).

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment field to search and select a piece of equipment.

Customer

To add a customer to your search criteria, you can use the search icon to search for a value and return it to the Customer field. You can also manually enter the address book number of a customer in the field.

To search for a customer, tap the search icon. In the Address Book search screen, you can use a combination of the customer name and search type to search for a customer. After you specify values for your search, tap the Search button. The system pulls up all records that satisfy the search criteria.

To discontinue the search and to go back to the Filters screen, tap the Cancel button.

To return a value back to the Customer field, tap the customer record from the search result.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for cases.

6. In the Filters screen, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of cases that are displayed based on your filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

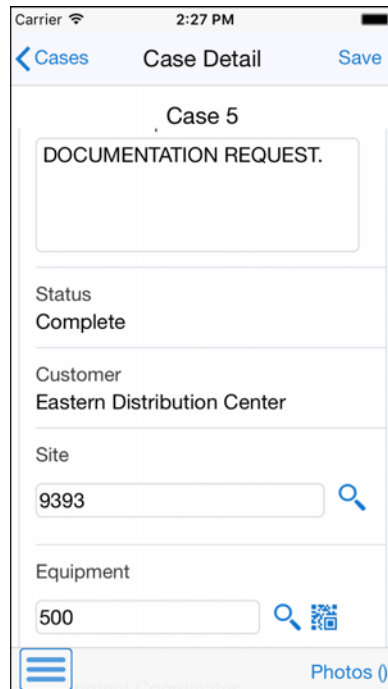
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of cases associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

7. To review and update a case, tap the case from the list.

The system takes you to the Case Detail screen and you can review information about the case.

Figure 13–2 Case Detail Screen - 1

8. You can update the values in the Failure Description, Site, and Equipment fields. Use the search icon to search for a site and equipment.

You can also use QR Code button next to the Equipment field to scan the barcode of the equipment. See [Section , "Enter data in the Equipment field using one of these options:"](#).

9. Tap the Map link in the Equipment Coordinates section to use the device's map feature.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

10. To cancel your changes and to go back to the Manage Cases screen, tap the Cancel button.
11. To save your changes, tap the Save button.
12. To view photos attached to the case, tap the Photos button. The number displayed on the Photos button represents the total number of photos related to the case.

After you tap the Photos button, the system displays the Photos screen, and the photos attached to the case are displayed as icons.

Note: If photos are not available for the case, the Photos button will be displayed as the Add Photo button. When you tap the Add Photo button, the system displays the Camera and the Album options on the Case Detail screen.

13. To view a photo, tap the photo icon.

You can delete existing photos attached to the case.

- 14.** To add a photo, tap the Add button on the Photos screen. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the work order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature.

You can add a description of the photo.

- 15.** After you tap the Save button in the New Photo screen, the system adds the photo to the list of photos, and increments the number of photos available by 1 (One) in the Photos button.

- 16.** To go back to the Manage Cases screen, tap the Cases button.

- 17.** To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Manage Customer Equipment Mobile Applications

This chapter discusses these topics:

- [Section 14.1, "Manage Customer Equipment Mobile Applications Overview"](#)
- [Section 14.2, "Setting Up the Manage Customer Equipment Mobile Application"](#)
- [Section 14.3, "Using the Manage Customer Equipment Mobile Tablet Application"](#)
- [Section 14.4, "Using the Manage Customer Equipment Mobile Smartphone Application"](#)

Important Note: Before you use the mobile applications, Oracle strongly recommends that you have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- Working with Equipment Information in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide
 - Creating Equipment Master Records Manually in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide
 - Creating Asset Identification Information in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide
 - Working with Role-Based Workspaces in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide
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14.1 Manage Customer Equipment Mobile Applications Overview

The Manage Customer Equipment mobile applications for tablet and smartphone enable you to search for equipment details as a subset of the equipment master information and to add notes. The Manage Customer Equipment applications enable you to see the key equipment information. Examples are:

- Equipment details
- Description

- Site Number
- Acquired and In Service dates
- Status

In the mobile applications for Manage Customer Equipment, you can view detailed information, and also update the data in the Equipment Status and Site Number fields. The device updates the equipment status in the Asset Master File (F1201) and Status History File (F1307) tables, and the site number in the F1201 and Equipment Master Location History (F1731) tables.

You can use the Manage Customer Equipment mobile applications to search for equipment that is in proximity to your location or to a reference point. The system displays an interactive map indicating the location of all the equipment within the radius that you specify. You can drill down further to view the details of a piece of equipment.

This table lists the applications that are available to review and update equipment details:

Type of Application	Additional Information
Base EnterpriseOne application	<p>Use these applications in the JD Edwards EnterpriseOne system to review and update customer equipment details:</p> <ul style="list-style-type: none"> ■ Work With Equipment Master (P1701) ■ Address Book Master Search (P0101S) ■ Equipment Master Revisions (P1702) ■ Equipment Detail (P1702E) ■ Equipment Master Address Location (P1704) ■ Address Book (P01012) ■ Equipment Master Location Details Location (P17041) ■ PM Backlog (P12071E) ■ Repair History (P48201E) ■ Meter Readings (P12120E)
Tablet application	<p>Manage Customer Equipment (M17060)</p> <p>To download the tablet application to your tablet device, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Manage Customer Equipment
Smartphone application	<p>Manage Customer Equipment (M17061)</p> <p>To download the smartphone application to your smartphone device, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Manage Customer Equipment

14.1.1 Differences and Limitations: Equipment Search Results

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Adding New Notes

When you work with notes for customer equipment, the Manage Customer Equipment mobile application uses the existing text attachments that are read-only. If

you add any text to the existing notes, the device appends the new text to the existing text attachments for notes. You cannot change the already existing notes for any equipment.

Searching Equipment Based on Proximity (Release 9.1 Update)

To search for equipment within a specific proximity to your location or another reference point, you use the Location Services functionality available in the Manage Customer Equipment mobile applications.

You can search for equipment based on their proximity to your current location, a specific street address, or a specific equipment's location. You can also specify a specific number of miles or kilometers as the radius for the search. The search is done based upon the coordinates (latitude and longitude) of the reference location and those of your equipment. In order to use your current location as the reference point, you must allow the application to access your location on your device.

Barcode Scanning (Release 9.1 Update)

The Manage Customer Equipment tablet application (M17060) and the Manage Customer Equipment smartphone application (M17061) are designed to scan data from a barcode and populate the equipment number in the Equipment Number field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

14.2 Setting Up the Manage Customer Equipment Mobile Application

Before you use the Manage Customer Equipment application, you must set the processing options for the application. If the processing options for the mobile applications are not set to determine which version to use for the Work With Equipment Master program (P1701), then the Equipment mobile applications for tablet and smartphone use the ZJDE0001 version of the Work With Equipment Master program.

To locate equipment in your proximity using the mobile applications, you must specify the latitude and longitude of each piece of equipment in the Work With Equipment Master program (P1701).

Note: If you want the system to auto-populate the Latitude and Longitude fields in the Work With Equipment Master program (P1701), you use the pre-built JD Edwards EnterpriseOne Update Equipment Location Internet of Things (IoT) orchestration.

See Update Equipment Location in the *JD Edwards EnterpriseOne Applications Business Interfaces Implementation Guide*

(Release 9.1 Update) End users of mobile applications can also set up user preferences to search for equipment within a user-defined proximity. These preferences enable users to show or hide equipment within a specific proximity to your location or another reference point.

(Release 9.1 Update) You can use one of the following options to scan barcodes of equipment number:

- Disable the Bluetooth option in the settings on your device if you want to use the native device camera to scan the barcodes of equipment number.
- Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes of equipment number.

To scan barcodes using the Bluetooth scanning device, you must configure the scanning device to the mobile device.

14.2.1 Setting Processing Options for the Service Equipment Mobile Tablet Application (M17060)

You use processing options to specify default processing information for a program.

14.2.1.1 Versions

1. Equipment Master (P1701) Version

Use this processing option to specify the version of the Work With Equipment Master program that you want to run while running the Manage Customer Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

2. Equipment Master Revisions (P1702) Version

Use this processing option to specify the version of the Equipment Master Revisions program that you want to run while running the Manage Customer Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

3. Address Book (P01012) Version

Use this processing option to specify the version of the Address Book program that you want to run while running the Manage Customer Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

4. Equipment Address Location (P1704) Version

Use this processing option to specify the version of the Equipment Address Master Location program that you want to run while running the Manage Customer Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

5. Equipment Detail (P1702E) Version

Use this processing option to specify the version of the Equipment Detail program that you want to run while running the Manage Customer Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

6. Equipment PM Backlog (P12071E) Version

Use this processing option to specify the version of the PM Backlog program that you want to run while running the Manage Customer Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

7. Equipment Repair History (P48201E) Version

Use this processing option to specify the version of the Repair History program that you want to run while running the Manage Customer Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

8. Meter Reading (P12120E) Version

Use this processing option to specify the version of the Meter Readings program that you want to run while running the Manage Customer Equipment mobile application for tablet. If you leave it blank, the device uses the ZJDE0001 version.

9. Equipment Proximity (P1731P) Version

Use this processing option to specify the version of the Equipment Proximity program (P1731P) that you want to use to locate equipment within a user-defined radius. If you leave this processing option blank, the system uses the ZJDE0001 version.

14.2.2 Setting Processing Options for the Service Equipment Mobile Smartphone Application (M17061)

You use processing options to specify default processing information for a program.

14.2.2.1 Versions

1. Equipment Master (P1701) Version

Use this processing option to specify the version of the Work With Equipment Master program that you want to run while running the Manage Customer Equipment mobile application for smartphone. If you leave it blank, the device uses the ZJDE0001 version.

2. Equipment Master Revisions (P1702) Version

Use this processing option to specify the version of the Equipment Master Revisions program that you want to run while running the Manage Customer Equipment mobile application for smartphone. If you leave it blank, the device uses the ZJDE0001 version.

3. Address Book (P01012) Version

Use this processing option to specify the version of the Address Book program that you want to run while running the Manage Customer Equipment mobile application for smartphone. If you leave it blank, the device uses the ZJDE0001 version.

4. Equipment Address Location (P1704) Version

Use this processing option to specify the version of the Equipment Address Master Location program that you want to run while running the Manage Customer Equipment mobile application for smartphone. If you leave it blank, the device uses the ZJDE0001 version.

5. Equipment Detail (P1702E) Version

Use this processing option to specify the version of the Equipment Detail program that you want to run while running the Manage Customer Equipment mobile application for smartphone. If you leave it blank, the device uses the ZJDE0001 version.

6. Equipment Proximity (P1731P) Version

Use this processing option to specify the version of the Equipment Proximity program (P1731P) that you want to use to locate equipment within a user-defined radius. If you leave this processing option blank, the device uses the ZJDE0001 version.

14.2.3 Setting Processing Options for the Equipment Proximity Program (P1731P)

You use processing options to specify default processing information for a program.

14.2.3.1 Default

Unit of Measure for Distance

Use this processing option to specify the unit of measure for the radius within which the system locates the equipment. Values are:

MI: Mile

KM: Kilometer

If you leave this processing option blank, the system uses MI (Mile) as the default unit of measure.

Proximity

Use this processing option to specify the numerical value for the radius within which the system locates the equipment. The center of the radius is always the reference point; the reference point can be your location, or can be user-defined.

The numerical value in this field uses the unit of measure specified in the Unit of Measure for Distance processing option.

If you leave this processing option blank, the system uses 10 as the default proximity.

14.2.3.2 Versions

1. Equipment Master Revisions (P1702) Version

Use this processing option to specify the version of the Equipment Master Revisions program (P1702) that you want to use to retrieve equipment information. If you leave this processing option blank, the system uses the ZJDE0001 version.

2. Equipment Details (P1702E) Version

Use this processing option to specify the version of the Equipment Details program (P1702E) that you want to use to retrieve equipment information. If you leave this processing option blank, the system uses the ZJDE0001 version.

3. Address Book (P01012) Version

Use this processing option to specify the version of the Address Book program (P01012) that you want to use to retrieve the site address of the equipment. If you leave this processing option blank, the system uses the ZJDE0001 version.

4. Meter Readings (P12120E) Version

Use this processing option to specify the version of the Meter Readings program (P12120E) that you want to use to retrieve meter readings information of the equipment. If you leave this processing option blank, the system uses the ZJDE0001 version.

14.2.4 Setting User Preferences for the Manage Customer Equipment Mobile Applications

You set up the user preferences for the Manage Customer Equipment mobile applications to locate equipment within a radius. To set these preferences, access Settings on your mobile device, select the application you want to configure, and set each of these fields:

- **Location:** Enable this option to allow the mobile application to access the device's location. If you do not enable this option, you must manually enter the geographical coordinates of your location (or of a different location) to use as the reference point.

- **(Release 9.1 Update) Include Proximity in search:** You set up user preferences for the Manage Customer Equipment mobile applications to search for equipment located within a radius. To set these preferences, access the Setting screen on your mobile device, and set the Include Proximity in Search option to On (display) or Off (do not display). After you enable the Include Proximity in Search option, you can set the Proximity and Unit of Measure preference fields.
- **Proximity:** Enter a numerical value for the radius within which the system locates the equipment. The center of the radius is the reference point; the reference point can be your location, or can be user-defined.
- **Unit of Measure:** Specify whether to use Mile or Kilometer for the radius (proximity) within which the system locates the equipment. The default unit of measure is Mile.

Figure 14–1 Setting User Preferences in a Tablet

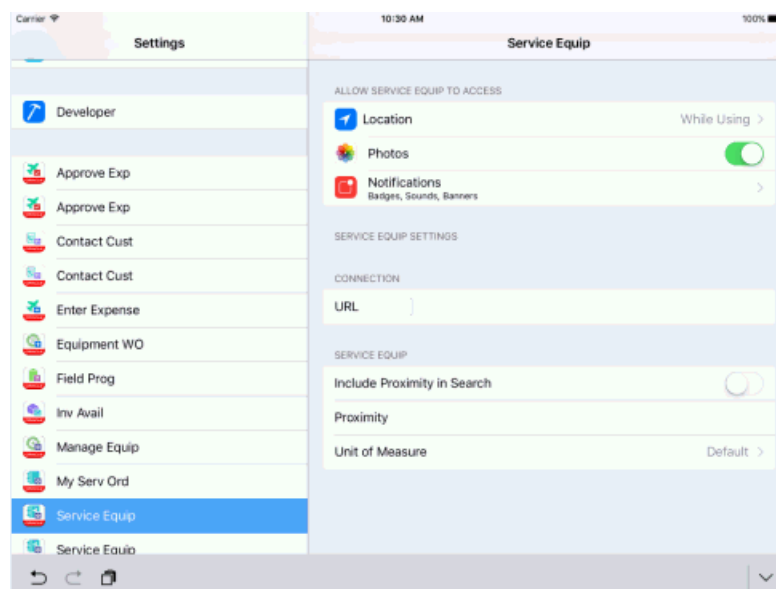
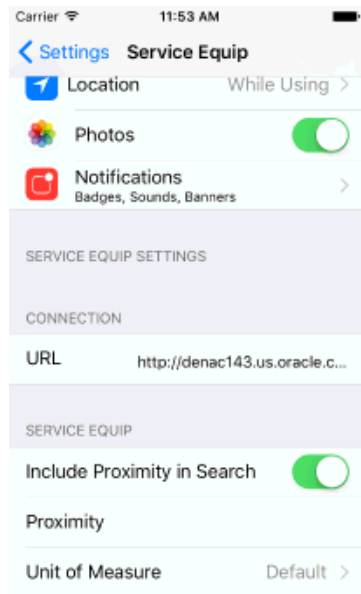


Figure 14–2 Setting User Preferences in a Smartphone

For instructions about accessing the settings on your mobile device, see the user documentation for your device.

Note: Entering connection information in the URL field is discussed in a separate task. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

14.2.5 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Manage Customer Equipment tablet application (M17060) and the Manage Customer Equipment smartphone application (M17061) include the Equipment Number field in the filter screens of the applications. You use the Equipment Number filter to filter records by equipment number.

You can populate the Equipment Number field using the following options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option on your device, the system may disable the device's keyboard.

14.3 Using the Manage Customer Equipment Mobile Tablet Application

The Manage Customer Equipment tablet application enables you to search the equipment, view details, and update the number and site number of equipment. In addition, the Manage Customer Equipment tablet application also enables you to:

- View Preventive Maintenance (PM) backlog details.
- View repair history through equipment work orders.
- View current meter readings and enter either new readings or net increases for a single piece of equipment. You use meter readings to monitor equipment use and to initiate maintenance tasks.
- View or add notes pertaining to a piece of equipment.
- View, add, or delete photos for equipment.
- Search for equipment within a user-defined proximity (Release 9.1 Update).

Before you can use the Manage Customer Equipment application for tablet, you must download the application from the application store and install it on your tablet device.

14.3.1 Reviewing Equipment Details Using the Manage Customer Equipment Mobile Tablet Application

To review service equipment:

1. Open the application by tapping the Service Equip icon on your device, and log in. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. To locate equipment that is in proximity to you (or to a user-defined reference point), tap the Locate Equipment link at the top right of the screen.

For instructions about locating equipment in your proximity, see [Section 14.3.2, "Searching for Equipment within a User-Defined Proximity Using the Manage Customer Equipment Mobile Tablet Application \(Release 9.1 Update\)"](#)

3. From the Manage Customer Equipment home screen, enter the description partially or in whole in the Enter Equip Desc field to narrow the search for a specific piece of equipment. Then, tap the Search button next to the Enter Equip Desc field to search for equipment by description. Alternately, you can leave the Enter Equip Desc field empty and tap the Search button to retrieve all equipment. When you click the Search button, the system displays the details of the first record in the right pane of the Manage Customer Equipment screen.

To clear the description in the Enter Equip Desc field, tap the Clear button.

4. To review details about a specific piece of equipment, tap the equipment from the equipment list.

Figure 14–3 Service Equipment Tablet: Customer Equipment Details

The screenshot displays the 'Manage Customer Equipment' interface on a tablet. The main title is 'Pump Equipment 1892'. Below the title are tabs for 'Equipment', 'PM Backlog', 'Repair History', 'Meter Reading', and 'Notes'. The 'Equipment' tab is active, showing a list of fields: Description 2, Description 3, Unit Number, Serial Number, Parent Number (1892), and Equipment Status (set to 'AV - Available - On Job Site'). Below these are fields for Date Acquired (02/21/13), Allow Work Orders (checked), In Service Date, and Meter Reading Required (unchecked). The Site Number is 1001, with an 'AB Common' button. The Site Address is '8055 Tufts Avenue, Suite 1331, Denver, CO 80237', and there is a 'Map' button for Site Coordinates. The Oracle JD Edwards logo is visible at the bottom left, and a 'Photos (0)' button is at the bottom right.

- To search details of a specific piece of equipment by site, customer, status, or by a specific equipment number, tap the Filter button next to the Enter Equip Desc field.

Site

This field retrieves the equipment based on the address book number of the site location.

Enter the address book number in the Site field.

Alternately, tap the Search button next to the Site field, and then tap the Search button on the Address Book Search window. You can also search by entering a description or address book type.

The device displays address book numbers based on your search. Tap the address book number that you want to select.

Customer

This field retrieves the equipment based on the address book number of the customer. Enter a customer in the Customer field.

Alternately, tap the Search button. Enter description for a customer in the Customer field and tap the Search button on the Customer Address window. The device displays address book numbers based on your search. Tap the customer that you want to select.

Equipment Status

This field retrieves the equipment list based on the status assigned to the equipment record. To search for equipment by status, tap the Equipment Status drop-down menu and select a status. The device retrieves the list of equipment with the selected status.

Equipment Number

This field retrieves the equipment list based on the equipment number. To search for equipment by number, tap the Equipment Number field and enter a value for

equipment number. The device retrieves the equipment with the specific equipment number.

Equipment Number (Release 9.1 Update)

This field retrieves the equipment list based on the equipment number. Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 14.2.5, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Number field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Number field to search and select a piece of equipment.

6. To select a piece of equipment, tap the equipment from the equipment list on the left pane.
7. To update the equipment details, perform these steps:
 - To update the equipment status, tap the Equipment Status drop-down menu on the right side of the screen and select a different status.
 - To update the site number, tap the Site Number field and enter the new site number.

Alternately, tap the Search button. Enter an address book description in the Name field, tap the Search button on the Address Book window, and then tap the site number to update.
 - Tap the Save button.
8. Tap the data in the Site Address section of the screen to use the map or navigational features of your device.
9. To view photos for the selected piece of equipment, tap Photos at the bottom of the right pane. The device displays the list of photos for the selected piece of equipment on the Equipment Photos screen, with the first photo from the list displayed on the right pane. Tap the photo that you want to view.

Note: The number displayed on the Photos button represents the total number of photos related to the piece of equipment. If you add or delete photos from the photo list, this number changes accordingly.

10. To delete a photo, tap the photo you want to delete. Tap the Delete button on the Equipment Photos screen.
11. To add photos to the equipment record, tap the Add button on the Equipment Photos screen. The device displays a popup with two options: Album and Camera.

To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. On the New Photo screen, enter a name for the photo and tap the Save button.

To take a new photo, tap the Camera option to use the device's camera feature.
12. Tap the Back button on the Equipment Photos screen to return to the Manage Customer Equipment screen.
13. To review the Preventive Maintenance (PM) backlog details for the selected piece of equipment, tap the PM Backlog tab.

Note that you cannot use the Manage Customer Equipment application to make any changes to the PM backlog details.
14. To review the repair history of the selected piece of equipment, tap the Repair History tab. The device displays all work orders for the piece of equipment.

To narrow the search by work order status, tap the Work Order Status drop-down menu, and then tap a status to select. The device displays work orders with the specified status.

Note that you cannot use the Manage Customer Equipment application to make changes to the repair history of a piece of equipment.
15. To review or update the Meter Reading of the selected equipment, tap the Meter Reading tab.

Enter the new reading and/or the net increase for any of the meters for the piece of equipment, and then tap the Save button.
16. To enter notes and view notes history, tap the Notes tab. Tap the New Notes field to enter new notes. The system appends the new notes to the previous notes that display in the Notes History section.
17. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

14.3.2 Searching for Equipment within a User-Defined Proximity Using the Manage Customer Equipment Mobile Tablet Application (Release 9.1 Update)

This task outlines the steps to search for equipment within a user-defined proximity to your location or to a reference point by using the Manage Customer Equipment mobile tablet application.

To locate equipment in your proximity:

1. Open the application by tapping the Service Equip icon on your device, and then log in. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. To search for equipment within a user-defined proximity or a reference point, tap the Filter button at the top left of the screen.
3. To filter equipment records by site, customer, or equipment number, enter data in the Site and Equipment Number or Customer fields.
4. To turn on or turn off the Include Proximity in Search option, click the toggle button.
5. To refine your search, tap the Locate By drop-down button.

Figure 14–4 Include Proximity

On the filters screen, the Locate By drop-down menu provides three options: My Location, Street Address, and Site. The system displays the My Location option by default and populates default values in these fields: Proximity, Latitude, and Longitude.

My Location

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location.

Street Address

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location based on the equipment's address.

Proximity

The system populates these fields with the values that you have set up in the user preferences for the application. If you have not specified the default values in the preferences, the system populates the values from the processing options for the Equipment Proximity program (P1731P). The system filters equipment that is located within the radius specified in the Proximity field.

To search for equipment using a different radius, tap the Proximity field and enter a new value.

6. In the Filters screen, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of equipment and the map that is displayed based on the updated proximity, latitude, and longitude filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system takes you to the list of equipment associated with the last saved filter values, if applicable.

To delete all filter values you specified and to enter new filter values, tap the Clear button.

7. On the Manage Customer Equipment screen, the system displays a list of equipment and a map link on the top-left corner on the left pane.
8. On the Details screen, to view equipment locations on the map, click the Map link on the top-left corner of the screen.

On the Map screen, the system displays the list of equipment records in the left pane based on the filter values and a map with markers for each equipment location in the right pane.

The location of each piece of equipment on the left pane is indicated on the map by a red marker. This equipment is located within the radius that you have defined in the application preference, or in the Proximity processing option for the Equipment Proximity program (P1731P). The blue marker on the map indicates your location or the reference point.

You can zoom in and zoom out on the map. You can also view the street image of a location by tapping the street view icon (yellow man) on the top-left of the map.

9. To view the details of the equipment, you must select an Equipment record. You can select the equipment records either by tapping the equipment record from the list on the left pane, or by tapping the red marker for the equipment record on the map in the right pane.

When you select the equipment record on the map, the red marker for the equipment record turns to green.

The system displays a blue maker for your location or the reference point, and a red marker for each equipment within the specified filter range.

10. To view the details of the equipment, tap the green marker. The system displays a window that has basic information about the equipment (such as the equipment name and number, equipment location address and geocodes, and the phone number) and a Details link. To access the equipment details screen, tap the Details link.
11. To view the equipment details of a different equipment, tap the equipment record from the list on the left pane. You can also select a different equipment by going back to the home-screen map and selecting the equipment marker on the map.

14.4 Using the Manage Customer Equipment Mobile Smartphone Application

The Manage Customer Equipment smartphone application (M17061) enables you to search equipment, view details, and update the status and site of equipment on a mobile smartphone. In addition, the application enables you to view or add notes pertaining to a piece of equipment, and also to view, add, or delete photos for equipment.

Before you can use the Manage Customer Equipment application for smartphone, you must download and install the application from the application store on your smartphone device.

14.4.1 Reviewing Equipment Details Using the Equipment Mobile Smartphone Application

To review service equipment details:

1. Open the application by tapping the Service Equip icon on your device, and log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Manage Customer Equipment home screen, enter the description partially or in whole in the Enter Equip Desc field to narrow the search for a specific piece of equipment. Then, tap the Search button next to the Enter Equip Desc field to search for equipment by description. Alternately, you can leave the Enter Equip Desc field empty and tap the Search button to retrieve all equipment.
3. To locate equipment that is in proximity to you (or to a user-defined reference point), tap the Locate Equipment link at the bottom right of the screen.
For instructions about locating equipment within proximity, see [Section 14.4.2, "Searching for Equipment within a User-Defined Proximity Using the Manage Customer Equipment Mobile Smartphone Application \(Release 9.1 Update\)"](#)
4. To search details of a piece of equipment by site, customer, status, or by a specific equipment number, tap the Filter button next to the Enter Equip Desc field.

Site

This field retrieves the equipment based on the address book number of the site location.

Enter the address book number in the Site field.

Alternately, tap the Search button next to the Site field, and then tap the Search button on the Address Book Search window. You can also search by entering a description or address book type.

The device displays address book numbers based on your search. Tap the address book number that you want to select.

Customer

This field retrieves the equipment based on the address book number of the customer. Enter a customer in the Customer field.

Alternately, tap the Search button. Enter description for a customer in the Customer field, tap the S button on the Customer Address window. The device displays address book numbers based on your search. Tap the customer that you want to select.

Equipment Status

This field retrieves the equipment list based on the status assigned to the equipment record. To search for equipment by status, tap the Equipment Status dropdown menu and select a status. The device retrieves the list of equipment with the selected status.

Equipment Number

This field retrieves the equipment list based on the equipment number. To search for equipment by number, tap the Equipment Number field and enter a value for

equipment number. The device retrieves the equipment with the specified equipment number.

Equipment Number (Release 9.1 Update)

This field retrieves the equipment list based on the equipment number. Enter data in the Equipment Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.

- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

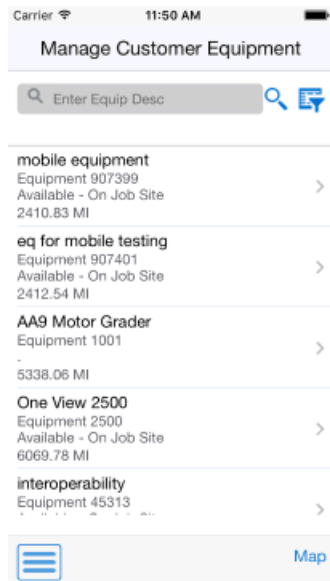
See [Section 14.2.5, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment Number field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Number field to search and select a piece of equipment.

5. To review details about a specific piece of equipment, tap the equipment from the equipment list.

Figure 14–5 Service Equip: Select Equipment

6. To update the equipment details, perform these steps:
 - To update the equipment status, tap the Equipment Status dropdown menu, and then tap a status to select.

Figure 14–6 Service Equipment Smartphone: Equipment

Carrier 10:49 AM

Search Equipment Save

Service Truck 20"
Equipment 1130

Equipment Notes

Description 2
Ford F150

Description 3
Rebuilt Engine

Unit Number
1130

Serial Number
SN1130

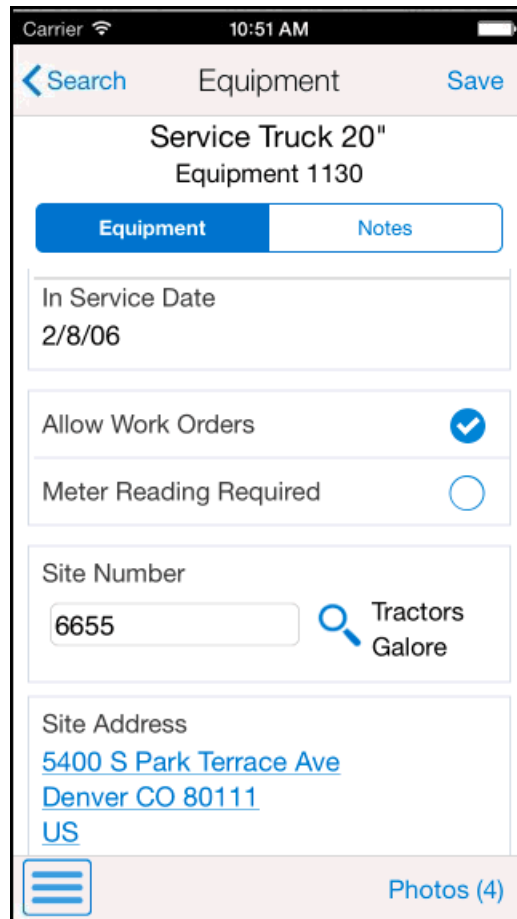
Parent Number
1130

Equipment Status
AV - Available - On Job Site

Date Acquired

Photos (4)

- To review the site number, scroll down on the screen. To update the site number, select the current site number and enter the new site number.
Alternately, to update the site number, tap the Search button. Enter a description for location in the Description field, tap the Search button on the Location Search window, and then tap the location to update.
 - Tap the Save button.
7. Tap the data in the Site Address section of the screen to use the map or navigational features of your device.

Figure 14–7 Service Equipment Smartphone: Site Coordinates

8. To view photos for the selected piece of equipment, tap the Photos button. The device displays the list of photos for the selected piece of equipment on the Equipment Photos screen.

Note: The number displayed on the Photos button represents the total number of photos related to the piece of equipment. If you add or delete photos from the photo list, this number changes accordingly.

9. To add photos to the equipment record, tap the Add button on the Photos screen. The device displays a popup with two options: Album and Camera.

To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. On the New Photo screen, enter a name for the photo and tap the Save button.

To take a new photo, tap the Camera option to use the device's camera feature.
10. To enlarge the photo, tap the photo twice. To zoom in on the photo, pinch and drag. To zoom out, reverse the drag and pinch motion.

Note: The zoom feature is not available on Android devices.

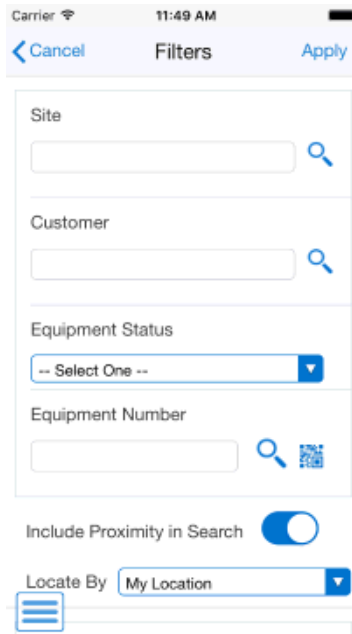
11. To delete a photo, tap the photo you want to delete. Tap the Delete button on the Photo screen.
Tap the List button to return to the Photos screen.
12. Tap the Back button on the Photos screen to return to the Equipment screen.
13. To view and add notes, tap the Notes tab. Tap the New Notes text area and enter new notes. Tap the Save button. The system appends the new notes to the existing notes and displays them in the Notes History section.
14. To return to the home screen of Manage Customer Equipment, tap the Search button at the top left of the screen.
15. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

14.4.2 Searching for Equipment within a User-Defined Proximity Using the Manage Customer Equipment Mobile Smartphone Application (Release 9.1 Update)

This task outlines the steps to search for equipment that is in proximity to your location or to a reference point, by using the Manage Customer Equipment mobile smartphone application.

To locate equipment in your proximity:

1. Open the application by tapping the Service Equip icon on your device, and then log in. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. To search for equipment within a user-defined proximity or a reference point, tap the Filter button.
3. To filter equipment records by site, customer, or equipment number, enter data in the Site and Equipment Number or Customer fields.
4. To turn on or turn off the Include Proximity in Search option, click the toggle button.
5. To refine your search, tap the Locate By drop-down button.

Figure 14–8 Filters Screen

On the filters screen, the Locate By drop-down menu provides three options: My Location, Street Address, and Site. The system displays the My Location option by default and populates default values in these fields: Proximity, Latitude, and Longitude.

My Location

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location.

Street Address

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location based on the equipment's address.

Proximity

The system populates these fields with the values that you have set up in the user preferences for the application. If you have not specified the default values in the preferences, the system populates the values from the processing options for the Equipment Proximity program (P1731P). The system filters equipment that is located within the radius specified in the Proximity field.

To search for equipment using a different radius, tap the Proximity field and enter a new value.

6. In the Filters screen, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of equipment and the map that is displayed based on the updated proximity, latitude, and longitude filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system takes you to the list of equipment associated with the last saved filter values, if applicable.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

7. On the Manage Customer Equipment screen, the system displays a list of equipment and a map link on the top-left corner.
8. On the Details screen, to view equipment locations on the map, select an equipment record and click the Map link on the top-left corner of the screen.
9. To view the details of the equipment, tap the red marker for the equipment record on the map.

When you select the equipment record on the map, the red marker for the equipment record turns to green.

The system displays a blue maker for your location or the reference point, and a red marker for each equipment within the specified filter range.

10. To view the details of the equipment, tap the green marker. The system displays a window that has basic information about the equipment (such as the equipment name and number, equipment location address and geocodes, and the phone number) and a Details link. To access the equipment details screen, tap the Details link.
11. To view the details of a different equipment record, return to the equipment list, and tap the equipment record from the list. You can also select a different equipment record by going back to the map and selecting the equipment record on the map.

To access the customer details screen, tap the Search link.

12. To log out of the application, tap the Menu button at the bottom-left of the screen, and then tap Logout.

Manage My Service Orders Mobile Applications

This chapter discusses these topics:

- [Section 15.1, "Manage My Service Orders Mobile Applications Overview"](#)
- [Section 15.2, "Setting Up the Manage My Service Orders Mobile Applications"](#)
- [Section 15.3, "Using the Manage My Service Orders Mobile Tablet Application \(M17031\)"](#)
- [Section 15.4, "Using the Manage My Service Orders Mobile Smartphone Application \(M17030\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Understanding Field Service Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
-
-

15.1 Manage My Service Orders Mobile Applications Overview

You use the Manage My Service Orders mobile applications to easily review and update service orders assigned to you. You can use filters to search for service orders. For each service order, you can review customer and equipment information, status and priority of the service order, planned start date, planned completion date, actual finish date, and failure description. You can also review the address and location details of the customer and site associated with the service order, and use the device's map and navigational features to locate the site and customer.

You can view photos of the service order and equipments associated with the service order. You can also add new photos and delete existing photos on a service order.

This table lists the applications that are available to review and update service orders:

Type of Application	Additional Information
Base EnterpriseOne application	<p>To review and update service orders, use these applications in the JD Edwards EnterpriseOne system:</p> <ul style="list-style-type: none"> ■ Work with Work Orders (P48201) ■ Field Service Inquiry (P48100) ■ Field Service Revisions (P17100) ■ Work Order Parts Detail (P17730) ■ Work Order Labor Detail (P17732) ■ Work Order Inventory Issues (P31113)
Tablet application	<p>Manage My Service Orders (M17031)</p> <p>To download the application to your tablet, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards My Service Orders
Smartphone application	<p>Manage My Service Orders (M17030)</p> <p>To download the application to your smartphone, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards My Service Orders

Before using the Manage My Service Orders tablet or smartphone applications, you:

- Set processing options for the Manage My Service Orders mobile applications (M17031 and M17030).
- Set processing options for the Field Service Inquiry program (P48100) to display only those service orders that are assigned to you.
- Set processing options for the Work Order Inventory Issues program (P31113) to display the recommended issued quantity for all parts, and to process the issue of parts for all records.

15.1.1 Differences and Limitations: Manage My Service Orders

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Difference in the Text Attachment Functionality

The Manage My Service Orders mobile tablet application appends new text attachment that you enter to existing text attachment. In the tablet application, existing text attachments are read-only, and you cannot edit them. Also, the tablet application retrieves only the first text attachment available in the Field Service Revisions program (P17100). Hence, you cannot use the tablet application to view all the text attachments available for a service order.

When you enter a new text attachment in the Field Service Revisions program (P17100), you are adding the new text to the existing texts in the text attachment entry field. You can update existing texts and can also view all existing text attachments.

15.2 Setting Up the Manage My Service Orders Mobile Applications

Before using the Manage My Service Orders mobile applications (M17031 and M17030), you must set up the processing options of the applications in the JD Edwards EnterpriseOne system. You use the processing options to specify the versions of the

programs that the system uses to process service order data for the mobile applications.

You also set up these processing options for the version of the Field Service Inquiry program (P48100) that you specify:

- Work Order Type: Set this processing option to use service orders.
- Only Show User's Work Orders: Set this processing option to display only your service orders.

Note: When you log in to the mobile applications, the system looks at these processing options of the Field Service Inquiry program (P48100) and displays your service orders.

You also set up these processing options for the version of the Work Order Inventory Issues program (P31113) that you specify:

- Issue Material For: Set this processing option to automatically enter the recommended issued quantity for all parts.
- Select All Lines for Issue on Entry: Set this processing option to process issue for all records.
- Issue Type Code: Set this processing option to display components of all issue types.

Note: The system uses these processing options of the Work Order Inventory Issues program (P31113) to process and issue parts for the service order.

Note: Oracle recommends that you use the information provided here to set the processing options for your versions of the Field Service Inquiry program (P48100) and Work Order Inventory Issues program (P31113). If you set the processing options differently, the Manage My Service Orders mobile applications will not behave as expected.

See:

- "Setting Processing Options for Field Service Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- "Setting Processing Options for the Work Order Inventory Issues Program (P31113)" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

15.2.1 Setting Processing Options for the Manage My Service Orders Mobile Tablet Application (M17031)

You use processing options to specify default processing information for a program.

15.2.1.1 Versions

1. Field Service Inquiry (P48100) Version

Use this processing option to specify which version of the Field Service Inquiry program (P48100) the system uses. To process service orders, the Manage My Service Orders mobile tablet application (M17031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0003.

2. Work Order Parts Detail (P17730) Version

Use this processing option to specify which version of the Work Order Parts Detail program (P17730) the system uses. To process service orders, the Manage My Service Orders mobile tablet application (M17031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

3. Work Order Labor Detail (P17732) Version

Use this processing option to specify which version of the Work Order Labor Detail program (P17732) the system uses. To process service orders, the Manage My Service Orders mobile tablet application (M17031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

4. Work Order Inventory Issues (P31113) Version

Use this processing option to specify which version of the Work Order Inventory Issues program (P31113) the system uses. To process service orders, the Manage My Service Orders mobile tablet application (M17031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0002.

15.2.2 Setting Processing Option for the Manage My Service Orders Mobile Smartphone Application (M17030)

You use processing options to specify default processing information for a program.

15.2.2.1 Versions

1. Field Service Inquiry (P48100) Version

Use this processing option to specify which version of the Field Service Inquiry program (P48100) the system uses. To process service orders, the Manage My Service Orders mobile smartphone application (M17030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0003.

15.3 Using the Manage My Service Orders Mobile Tablet Application (M17031)

The Manage My Service Orders mobile tablet application (M17031) enables you to review details of service orders that are assigned to you. You can update the status of the service order, enter the actual date that you completed the service order, review parts and labor available for the service order, issue parts required to complete the service order, enter notes, and review previous notes.

Before you can use the application, you must download and install the application from the application store on your device.

15.3.1 Managing Service Orders Using a Mobile Tablet Application (M17031)

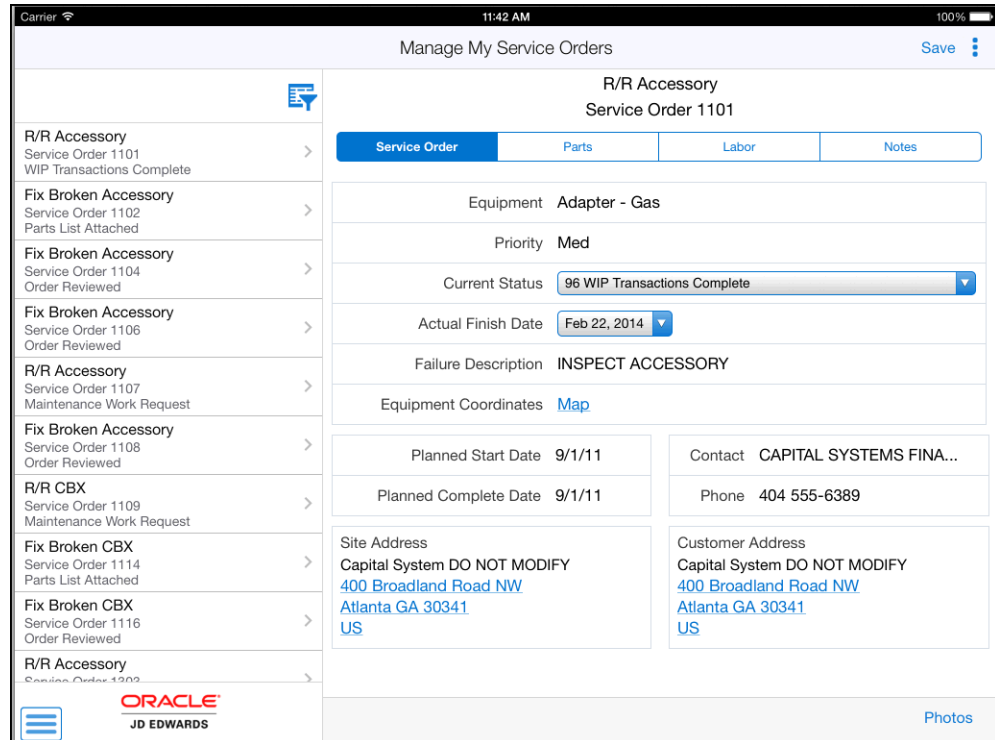
To manage service orders:

1. Open the application by tapping the My Serv Ord icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. On the Manage My Service Orders screen, review the service orders. In the right pane, the system displays the details of the service order that is first on the list.

Figure 15–1 Manage My Service Orders Home Screen: Tablet



3. To filter service orders, tap the filter icon at the top of the service orders list.

Start Date

Tap the From and To dropdown menus and specify the service order start date range that the system uses to search for service orders.

Customer

To add a customer to your search criteria, you can use the search icon to search for a value and return it to the Customer field, or you can manually enter the address book number of a customer in the field.

To search for a customer, tap the search icon. In the Customer Address search screen, you can use a combination of the customer name and search type to search for a customer. After you specify values for your search, tap the Search button. The system pulls up all records that satisfy the search criteria.

To discontinue the search and to go back to the Filters screen, tap the Cancel button.

To return a value back to the Customer field, tap the customer record from the search result.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for service orders.

Priority

Tap the Priority dropdown menu and specify the priority that the system uses to search for service orders.

Service Order Number

Tap the Service Order Number field and enter the service order number that the system uses to search for service orders.

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of service orders that are displayed based on your filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of service orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. To review and update a service order, tap the service order from the list of service orders.

Figure 15–2 Service Order Tab: Tablet

The screenshot shows the 'Manage My Service Orders' application on a tablet. The top status bar displays 'Carrier', '3:42 PM', and '100%' battery. The app title is 'Manage My Service Orders' with a 'Save' button and a menu icon. The main content area is titled 'Fix Broken Accessory Service Order 1104'. Below the title are four tabs: 'Service Order' (selected), 'Parts', 'Labor', and 'Notes'. The 'Service Order' tab displays the following information:

- Equipment: Bi-Wire Heavy Duty Jack
- Priority: Med
- Current Status: 10 Order Reviewed (dropdown menu)
- Advance Status: Parts List Attached
- Actual Finish Date: Feb 19, 2014 (dropdown menu)
- Failure Description: BROKEN ACCESSORY
- Equipment Coordinates: [Map](#)
- Planned Start Date: 6/1/11
- Planned Complete Date: 2/19/14
- Contact: CAPITAL SYSTEM
- Phone: 404 555-6389
- Site Address: Capital System DO NOT MODIFY, 400 Broadland Road NW, Atlanta GA 30341, US
- Customer Address: Capital System DO NOT MODIFY, 400 Broadland Road NW, Atlanta GA 30341, US

At the bottom of the screen, there is a 'Photos' button and the Oracle JD Edwards logo.

The system displays service order header information and four tabs: Service Order, Parts, Labor, and Notes. The Service Order tab is open by default.

6. To change the status of the service order, tap the Current Status dropdown menu and select a status. To save the update, tap the Save button.
7. You can also update the status of the service order by tapping the Advance Status button. To save the update, tap the Save button.

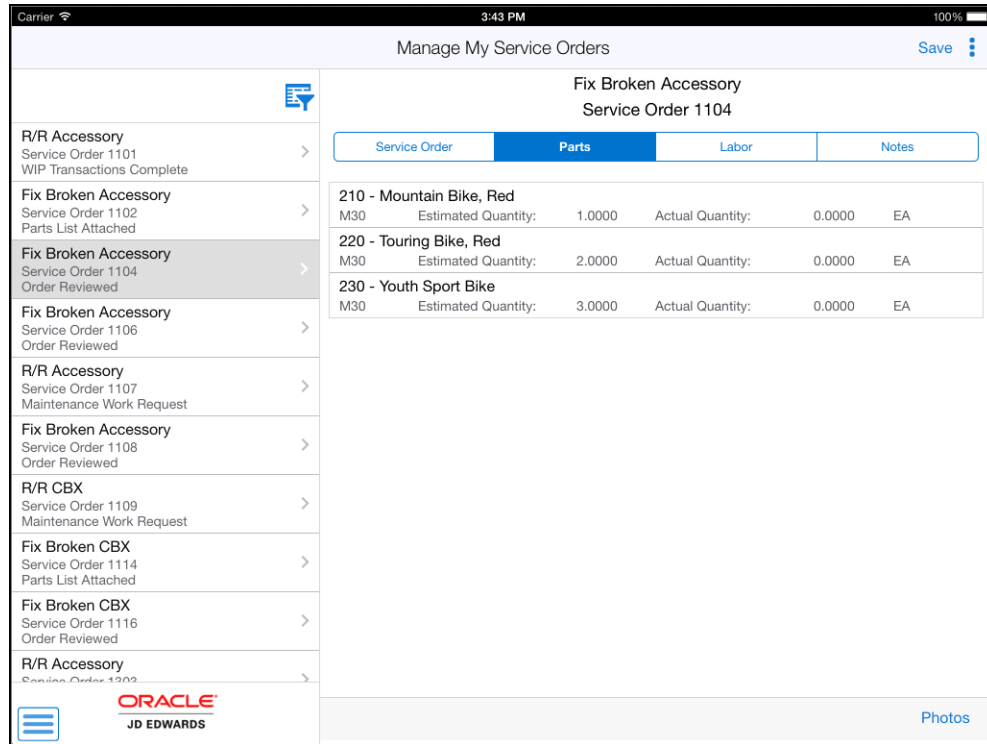
Note: Based on the work order activity rules, the system displays the Advance Status button with the next status. If work order activity rules are not applicable for your service order, or if the status is complete and no more statuses are available, then this button does not appear.

8. To select the date that you completed the service order, tap the Actual Finish Date dropdown menu. To save the update, tap the Save button.
9. To use the device's map feature, tap the Equipment Coordinates Map link.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

10. To use the device's navigational feature, tap the data in the Site Address and Customer Address sections of the form.
11. To review available parts and to issue parts for the service order, tap the Parts tab.

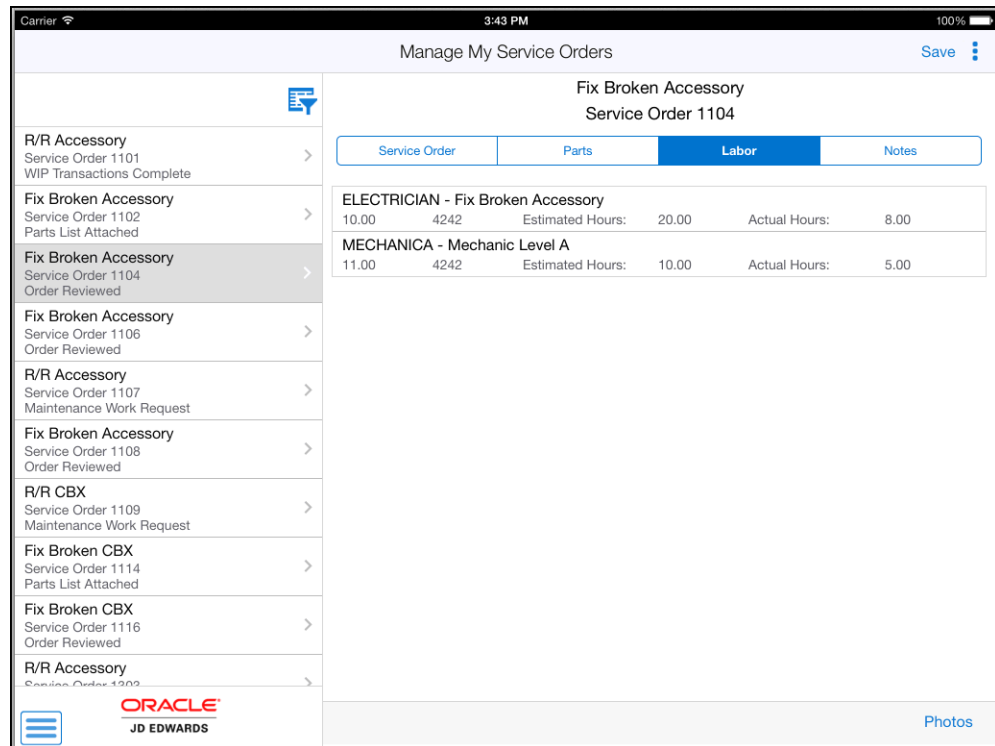
Figure 15–3 Parts Tab: Tablet



12. To issue parts that have not been issued, tap the three dots next to the Save button at the top right of the screen. The system displays the Issue Parts button. When you tap the Issue Parts button, the system updates the Actual Quantity field.

If a parts record does not exist for the service order, the Parts screen is blank, and the Issue Parts button is not displayed.

13. To review labor details for the service order, tap the Labor tab.

Figure 15–4 Labor Tab: Tablet

14. To enter notes and view notes history, tap the Notes tab. To enter new notes, tap the New Notes field, enter text, and tap the Save button.

Note: The tablet application retrieves only the first text attachment available in the media object of the Field Service Revisions program (P17100), and displays the retrieved text in the Notes History field.

When you enter text in the New Notes field and tap the Save button, the system adds the new text to the text in the Notes History field, and leaves the New Notes field blank.

15. To view photos of the service order, or the equipment associated with the service order, tap the Photos button.

When you tap the Photos button, the system displays two options: Service Order Photos and Equipment Photos. The number displayed on each option represents the total number of photos for the service order or the equipment.

16. To view existing photos of the service order and to add new photos, tap the Service Order Photos option.

To view photos of the equipment, tap the Equipment Photos option.

A list of photos appear as thumbnails in the left pane. In the right pane, the system displays the photo that is first on the list.

To view a photo, tap the photo thumbnail. To delete a photo, tap the Delete button. On the confirmation window that opens, tap to confirm that you are deleting the photo. The system removes the photo from the list of photos.

To add a photo to the service order, tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the service order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature.

Note: You cannot add or delete photos when you select the Equipment Photos option. The photos that you see in the Equipment Photos screen are retrieved from the EnterpriseOne system.

17. You can add a description of the photo. To save the photo, tap the Save button. The system adds the photo to the list of photos, and increments the number of photos available by 1 (One).
18. To discontinue adding the photo and to go back to the Service Order Photos screen, tap the Cancel button.
19. To go back to the Manage My Service Orders screen, tap the Back button.
If you navigate away from the service order record without saving your updates, you will lose unsaved changes.
20. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

15.4 Using the Manage My Service Orders Mobile Smartphone Application (M17030)

The Manage My Service Orders smartphone application (M17030) enables you to review details of service orders that are assigned to you. You can view photos of the service order, or equipment associated with service order. You can also add new photos to the service order. You can also add new photos and delete existing photos on the service order.

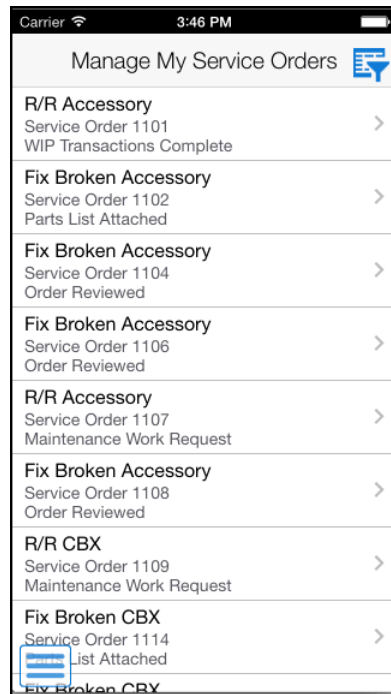
Before you can use the application, you must download and install the application from the application store on your device.

15.4.1 Managing Service Orders Using a Mobile Smartphone Application (M17030)

To manage service orders:

1. Open the application by tapping the My Serv Ord icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

Figure 15–5 Manage My Service Orders Home Screen: Smartphone

2. On the Manage My Service Orders screen, review the service orders. To refresh the data on the screen, swipe down on the screen.
3. To filter service orders, tap the filter icon at the top of the service order list.

Start Date

Tap the From and To dropdown menus and specify the service order start date range that the system uses to search for service orders.

Customer

To add a customer to your search criteria, you can use the search icon to search for a value and return it to the Customer field, or you can manually enter the address book number of a customer in the field.

To search for a customer, tap the search icon. In the Address Book search screen, you can use a combination of the customer name and search type to search for a customer. After you specify values for your search, tap the Search button. The system pulls up all records that satisfy the search criteria.

To discontinue the search and to go back to the Filters screen, tap the Cancel button.

To return a value back to the Customer field, tap the customer record from the search result.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for service orders.

Priority

Tap the Priority dropdown and specify the priority that the system uses to search for service orders.

Service Order Number

Tap the Service Order Number field and enter the service order number that the system uses to search for service orders.

4. In the Filters screen, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of service orders that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

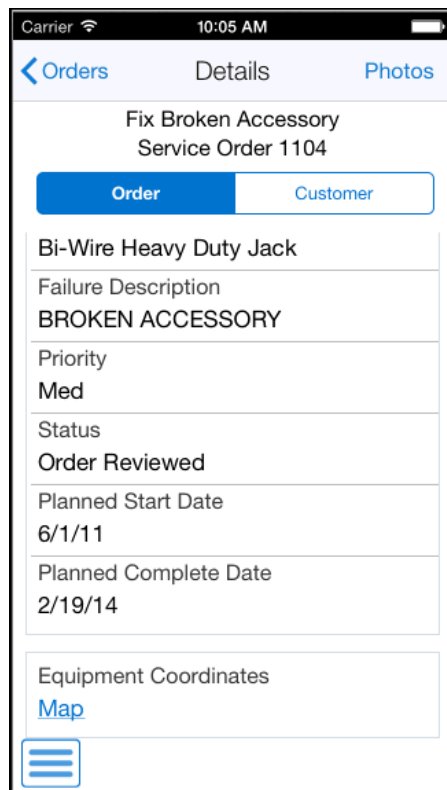
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of service orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. To review a service order, tap the service order from the list of service orders.

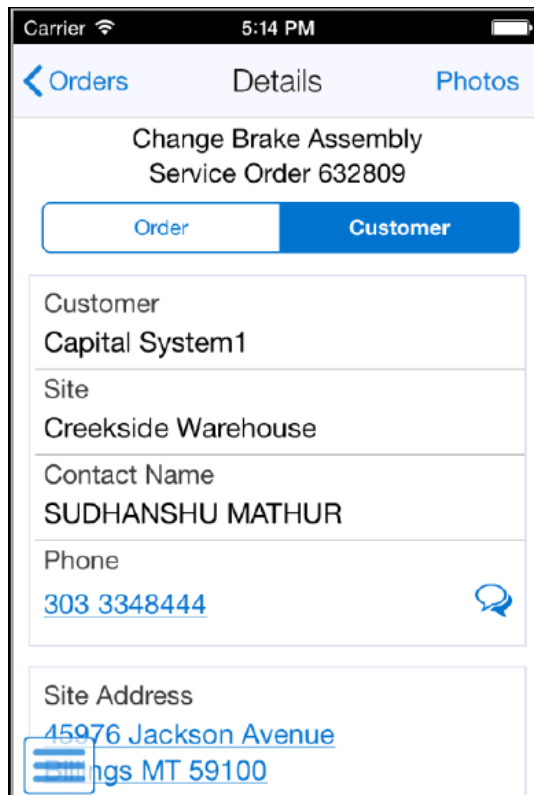
Figure 15–6 Order Tab: Smartphone



The system displays service order header information and two tabs: Order and Customer. The Order tab is open by default. To use the device's map feature, tap the Equipment Coordinates Map button.

Note: The system displays the Map link only if the latitude and longitude values are available for the location in the Equipment Master Address Locations program (P1704).

Figure 15–7 Customer Tab: Smartphone



6. To view customer details, tap the Customer tab. To use the device's navigational feature, tap the Site Address and Customer Address sections of the screen.
7. To call the customer, tap the phone number. To text the customer, tap the icon on the right.
8. To view photos of the service order, or the equipment associated with the service order, tap the Photos button. The system displays two options: Service Order Photos and Equipment Photos. The number displayed on the each option represents the total number of photos related to the service order or the associated equipment.
To view service order photos, tap the Service Order Photos option. The system displays the photos of the service order as thumbnails.
9. To view photos of the associated equipment, tap the Back button and select the Equipment Photos option.
10. To view a photo, tap the photo thumbnail.

Note: The system displays service order photos from the media object in the Field Service Revisions program (P17100), and equipment photos from the media object in the Work with Equipment Master program (P1701).

11. You can zoom in and zoom out photos for display. To zoom in, pinch and drag the part of the photo that you want to zoom in. To zoom out, drag and pinch the photo.
12. You can add new photos to the service order. Tap the Add button in the Service Order Photos screen. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the service order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature.
13. After you tap the Save button, the system adds the photo to the list of photos and increments the number of photos available by 1 (One).

Note: You cannot add or delete photos when you select the Equipment Photos option. The photos that you see when you select in the Equipment Photos screen are retrieved from the EnterpriseOne system.

14. To go back to the Details screen, tap the Back button.
15. To go back to the list of service orders, tap the Orders button.
16. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Quick Case Entry Mobile Application

This chapter discusses these topics:

- [Section 16.1, "Quick Case Entry Mobile Application Overview"](#)
- [Section 16.2, "Setting Up the Quick Case Entry Mobile Smartphone Application \(M17500E\)"](#)
- [Section 16.3, "Using the Quick Case Entry Mobile Smartphone Application \(M17500E\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Managing Cases" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
-
-

16.1 Quick Case Entry Mobile Application Overview

You use the Quick Case Entry mobile application (M17500E) to review your cases and to enter new cases. You can enter a description of the issue, equipment number, and address book number of the site associated with the case. You can search for cases from your list of cases. You can view photos associated with the case and also add new photos to the case.

This table lists the applications that are available for reviewing existing cases and entering new cases:

Type of Application	Additional Information
Base EnterpriseOne application	To review existing cases and enter new cases, use the Work With Cases program (P17500E) in the JD Edwards EnterpriseOne system.
Smartphone application	Quick Case Entry (M17500E) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Quick Case Entry

Before using the Quick Case Entry mobile application, you must set up the processing options for the Quick Case Entry mobile application (M17500E).

16.1.1 Differences and Limitations: Quick Case Entry

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The Quick Case Entry mobile application uses your login ID to search for cases you enter. After you launch the mobile application, the system displays a list of all your cases. You can search for specific cases and filter cases from your list.

When you search for cases in the Work With Cases program (P17500E), you can specify the search criteria across all cases to which you have access. Therefore, your search results in the mobile application can differ from the search results in the base application.

Barcode Scanning (Release 9.1 Update)

The Quick Case Entry mobile application (M17500E) is designed to scan data from a barcode and populate the equipment number in the Equipment field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

16.2 Setting Up the Quick Case Entry Mobile Smartphone Application (M17500E)

Before using the Quick Case Entry mobile smartphone application (M17500E), you must set up the processing option of the application in the JD Edwards EnterpriseOne system. You use the processing option to specify the version of the base application that you want to use.

Before you set up the processing option for the M17500E program, review the processing options for the Work With Cases program (P17500E). You review these processing options to verify the validity of the options in the specified version when you process case data by using the mobile device.

See: "Setting Processing Options for the Work with Cases Program (P17500E)" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

(Release 9.1 Update) You can use one of the following options to scan barcodes of equipment number:

- Disable the Bluetooth option in the settings on your device if you want to use the native device camera to scan the barcodes of equipment number.
- Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes of equipment number.

To scan barcodes using the Bluetooth scanning device, you must configure the scanning device to the mobile device.

16.2.1 Setting Processing Option for the Quick Case Entry Mobile Smartphone Application (M17500E)

You use processing options to specify default processing information for a program.

16.2.1.1 Versions

1. Enter the Version of Work With Cases (P17500E) to Use

Use this processing option to specify which version of the Work With Cases program (P17500E) the system uses. To process cases, the Quick Case Entry smartphone application (M17500E) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

16.2.2 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Quick Case Entry mobile application (M17500E) includes the Equipment field in two locations in the application. One is in the filter screen and another is in the Enter Case screen that displays when you add a new case. You use the Equipment filter to filter records by equipment number. When you enter a new case using the Quick Case Entry mobile application (M17500E), you must enter the equipment number in the Equipment Number field.

You can populate the Equipment field (in the filter screen as well as in the add new case screen) using the following options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option on your device, the system may disable the device's keyboard.

16.3 Using the Quick Case Entry Mobile Smartphone Application (M17500E)

The Quick Case Entry mobile smartphone application enables you to review your cases and to enter new cases.

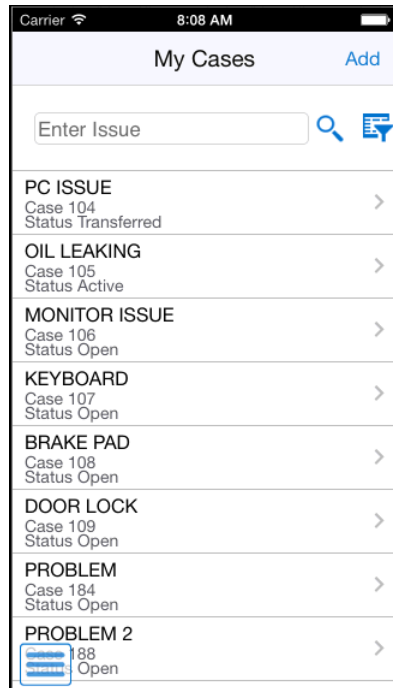
Before you can use the application, you must download and install the application from the application store on your device.

16.3.1 Entering Cases Using a Mobile Smartphone Application

To enter cases:

1. Open the application by tapping the Case Entry icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

Figure 16–1 My Cases Screen



2. From the My Cases screen, review the cases in the list. To refresh the data on the screen, swipe down on the screen.
3. To search for a case, tap the Search field, enter the case description, and then tap the search icon. The search pulls up all cases that satisfy the search text.
4. To clear the search text that you entered and to go back to the list of cases, tap the clear icon inside the Search field.
5. To filter cases, tap the filter icon at the top right of the My Cases screen.

Date

Tap the From and To dropdown menus and specify the date range that the system uses to search for cases.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for cases.

Note: If the fields at the bottom of the screen are obscured by the keyboard, you can tap the Next Field button to move to the next fields.

Equipment (Release 9.1 Update)

Tap the Equipment field and enter data using one of the following options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search icon to search for an equipment. In the Equipment search screen, enter a description of the equipment in the Equipment field, and then tap the Search button. The system pulls up all records that satisfy the search text; select a piece of equipment. To discontinue the search and to go back to the Filters screen, tap the Cancel button.

- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 16.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See [Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide](#).

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment field to search and select a piece of equipment.

Customer

To add a customer to your search criteria, you can use the search icon to search for a value and return it to the Customer field, or you can manually enter the address book number of a customer in the field.

To search for a customer, tap the search icon. In the Address Book search screen, you can use a combination of the customer name and search type to search for a customer. After you specify values for your search, tap the Search button. The system pulls up all records that satisfy the search criteria.

To discontinue the search and to go back to the Filters screen, tap the Cancel button.

To return a value back to the Customer field, tap the customer record from the search result.

6. In the filters screen, to continue the search by using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of cases that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the screen that has the list of cases associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

7. To enter a new case, tap the Add button on the My Cases screen.

Figure 16–2 Enter Case Screen

Issue

Enter a maximum of 100 characters to describe the issue.

Equipment (Release 9.1 Update)

Enter data in the Equipment field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search icon to search for an equipment. In the Equipment search screen, enter a description of the equipment in the Equipment field, and then tap the Search button. The system pulls up all records that satisfy the search text; select a piece of equipment. To discontinue the search and to go back to the Filters screen, tap the Cancel button.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Equipment field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Equipment field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 16.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment field to search and select a piece of equipment.

Site

To enter the site number, you can use the search icon to search for a value and return it to the Site field, or you can manually enter the site number in the field.

To search for a site, tap the search icon. In the Address Book search screen, you can use a combination of the site description and search type to search for a site. After you specify values for your search, tap the Search button. The system pulls up all records that satisfy the search criteria.

To discontinue the search and to go back to the Enter Case screen, tap the Cancel button.

To return a value back to the Site field, tap the site record from the search result.

Issue Description

The system populates this field with the issue description from the text attachment field in the Case Entry program (P17501E). You cannot edit this field.

8. To cancel your entry and to go back to the My Cases screen, tap the Cancel button.
9. To save the case, tap the Save button. After you tap this button, the system includes the new case that you entered to the list of cases in the My Cases screen.
10. To save the case and add photos to the case, tap the Save and Add Photo button.

After you tap this button, the system saves the case and displays the Photos screen.

11. To add a photo, tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the work order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature.

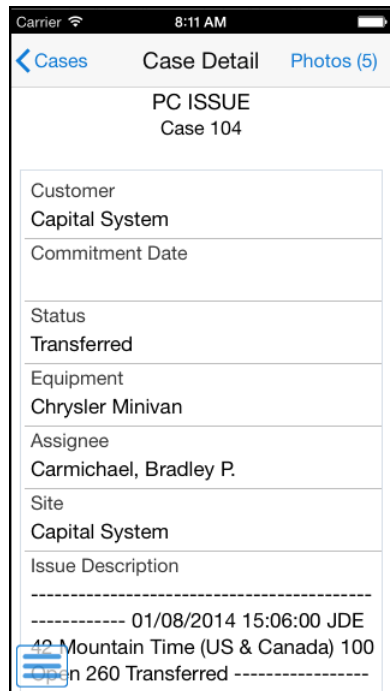
You can add a description of the photo.

12. The system adds the photo to the Photos screen, and displays the number of photos available for the case on the Photos button.
13. To go back to the My Cases screen, tap the Case button.
14. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

16.3.2 Reviewing Cases Using a Mobile Smartphone Application

1. To review existing cases, tap the case that you want to review from the My Cases screen. The system takes you to the Case Detail screen and you can review information about the case.

Figure 16–3 Case Detail Screen



2. In the Case Detail screen, tap the Photos button to view existing photos of the case. The number displayed on the Photos button represents the total number of photos related to the case.
3. After you tap the Photos button, the system displays the Photos screen, and the photos attached to the case are displayed as thumbnails.
4. To view a photo, tap the photo thumbnail.
5. To add a photo, tap the Add button. The system displays two options: Album and Camera.
 - To attach an existing photo from your device's photo gallery to the work order, tap the Album option.
 - To take a new photo, tap the Camera option to use the device's camera feature.
 - You can add a description of the photo.
6. The system adds the photo to the list of photos, and increments the number of photos available by 1 (One).
7. To go back to the Case Detail screen, tap the Case button.
8. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Note: You can only review existing cases and cannot update cases.
However, you can add photos to existing cases.

Review Cases Mobile Application

This chapter discusses these topics:

- [Section 17.1, "Review Cases Mobile Application Overview"](#)
- [Section 17.2, "Setting Up the Review Cases Mobile Application"](#)
- [Section 17.3, "Using the Review Cases Mobile Tablet Application \(M17500\)"](#)

Important Note: Before using the mobile application, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and application in the JD Edwards EnterpriseOne base software.

For additional information about the processes and application associated with the mobile application discussed in this chapter, see:

- "Entering Cases" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*
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17.1 Review Cases Mobile Application Overview

You use the Review Cases mobile application to easily view the number of cases based on several categories over a specific period of time. The categories are: Overdue Open, Escalated Open, Entered Today, Closed Today, Committed Today, Open, and Entitled. You can view a list of cases that fall in each of these categories and review the details of each case. You can review and analyze cases by priority through a pie-chart. You can use filters to search for cases.

You can also view existing photos of the case, and add new photos to the case.

This table lists the application that are available to review cases:

Type of Application	Additional Information
Base EnterpriseOne application	To review cases, use this application in the JD Edwards EnterpriseOne system: <ul style="list-style-type: none"> ■ Work With Case program (P17500)
Tablet application	Review Cases (M17500) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Review Cases

Before using the Review Cases tablet application, you set processing options for the Review Cases mobile tablet application (M17500).

17.1.1 Differences and Limitations: Review Cases

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, the mobile applications provide a subset of the functionality available in the base software.

The Review Cases mobile application is set up with search filters that are coded in the application, as described in the following table. When you launch the mobile application, the system displays cases that satisfy the criteria of these inbuilt filters. These search filters might cause your search results to appear differently in the mobile application, compared to the base application.

However, the mobile application provides you with editable filter fields that you can use to search for and filter cases.

Case Category	Hard-Coded Search Filters
Overdue Open	This category includes only those cases that are not specified as closed or cancelled in the filter, and the system date is greater than the committed date in the Date/Time Committed field in the Work With Case program (P17500).
Escalated Open	This category includes only those cases that are not specified as closed or cancelled in the filter, and the escalation method specified (Escalation 1) has a value greater than 1 (One) in the Work With Case program.
Entered Today	This category includes only those cases that have the system date as the case-entered date in the Date/Time Begin field in the Work With Case program.
Closed Today	This category includes only those cases that have the system date as the case-ending date in the Date/Time End field in the Work With Case program.
Committed Today	This category includes only those cases that have the system date as the case-committed date in the Date/Time Committed field in the Work With Case program.
Open	This category includes only those cases that are not specified as closed or cancelled in the filter.
Entitled	This category includes only those cases that are not specified as closed or cancelled in the filter, and the Entitlement Check field in the Work With Case program is populated with 1, 2, 3, or 4.

17.2 Setting Up the Review Cases Mobile Application

Before using the Review Cases mobile application (M17500), you must set up the processing options of the application in the JD Edwards EnterpriseOne system. You use the processing options to specify the versions of the programs that the system uses to process cases for the mobile application.

Before you set up the processing options for the M17500 program, review the processing options for the Work With Case program (P17500). You review these

processing options to verify the validity of the options in the specified versions when you process case data by using the mobile device.

See:

- "Setting Up Processing Options for the Work With Case Program (P17500)" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management Fundamentals Implementation Guide*

17.2.1 Setting Processing Options for the Review Cases Mobile Tablet Application (M17500)

You use processing options to specify default processing information for a program.

17.2.1.1 Versions

1. Work With Case (P17500) Version

Use this processing option to specify which version of the Work With Case program (P17500) the system uses. To process cases, the Review Cases mobile tablet application (M17500) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

2. Equipment Address Location (P1704) Version

Use this processing option to specify which version of the Equipment Address Location program (P1704) the system uses. To process work orders, the Review Cases mobile tablet application (M17500) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

3. Address Book (P01012) Version

Use this processing option to specify which version of the Address Book program (P01012) the system uses. To process cases, the Review Cases mobile tablet application (M17500) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

17.3 Using the Review Cases Mobile Tablet Application (M17500)

The Review Cases mobile tablet application (M17500) enables you to view summarized lists of cases by categories, and view detailed information about each case on a mobile tablet.

Before you can use the application, you must download and install the application from the application store on your device.

17.3.1 Reviewing Cases Using a Mobile Tablet Application (M17500)

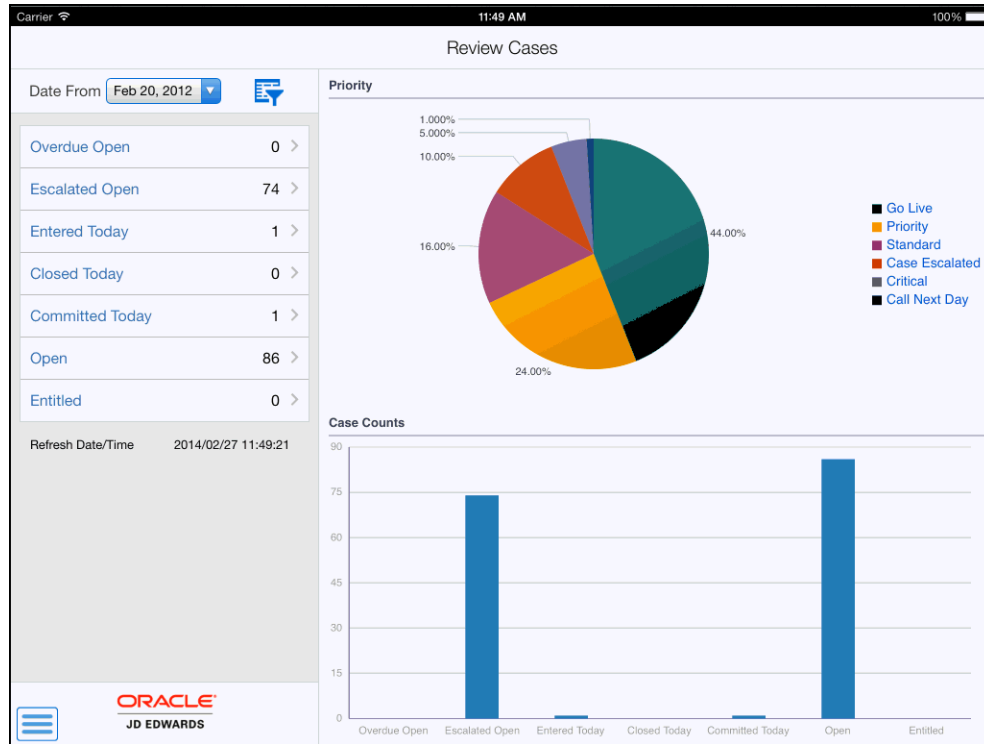
To review cases:

1. Open the application by tapping the Review Cases icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. On the Review Cases home screen, review the current cases data. To refresh the data on the screen, swipe down on the panel with the list of cases counts.

Figure 17-1 Review Cases Home Screen



Date From

This field uses the default date of one week prior to the system date. When you launch the application, the system displays case counts and data based on this date. You can change the date by tapping the Date From dropdown menu and selecting a different date. When you select a different date, the system updates the cases counts and data.

Cases Category Fields

The fields in this section list the number of cases by category since the selected date. Example, Overdue Open category lists the number of cases that are open and overdue since the specified date.

Note that the case counts displayed in these fields are also graphically displayed in the Case Counts section on the right side of the screen.

Priority

This graph displays the cases grouped by priority.

3. Tap any of the cases category fields on the left pane, segments in the Priority pie chart, or the bars in the Case Counts graph to display a list of cases in that category.
4. You can use filters to search and filter cases. To filter cases, tap the filter icon at the top of the left pane.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for cases.

Customer

To add a customer to your search criteria, you can use the search icon to search for a value and return it to the Customer field, or you can manually enter the address book number of a customer in the field.

To search for a customer, tap the search icon. In the Customer Address search screen, you can use a combination of the customer name and search type to search for a customer. After you specify values for your search, tap the Search button. The system pulls up all records that satisfy the search criteria.

To discontinue the search and to go back to the filters screen, tap the Cancel button.

To return a value back to the Customer field, tap the customer record from the search result.

Inventory Item

To add an inventory item to your search criteria, you can use the search icon to search for a value and return it to the Inventory Item field, or you can manually enter the item number in the field.

Provider Group

To add a provider group to your search criteria, you can use the search icon to search for a value and return it to the Provider Group field, or you can manually enter the provider group address book number in the field.

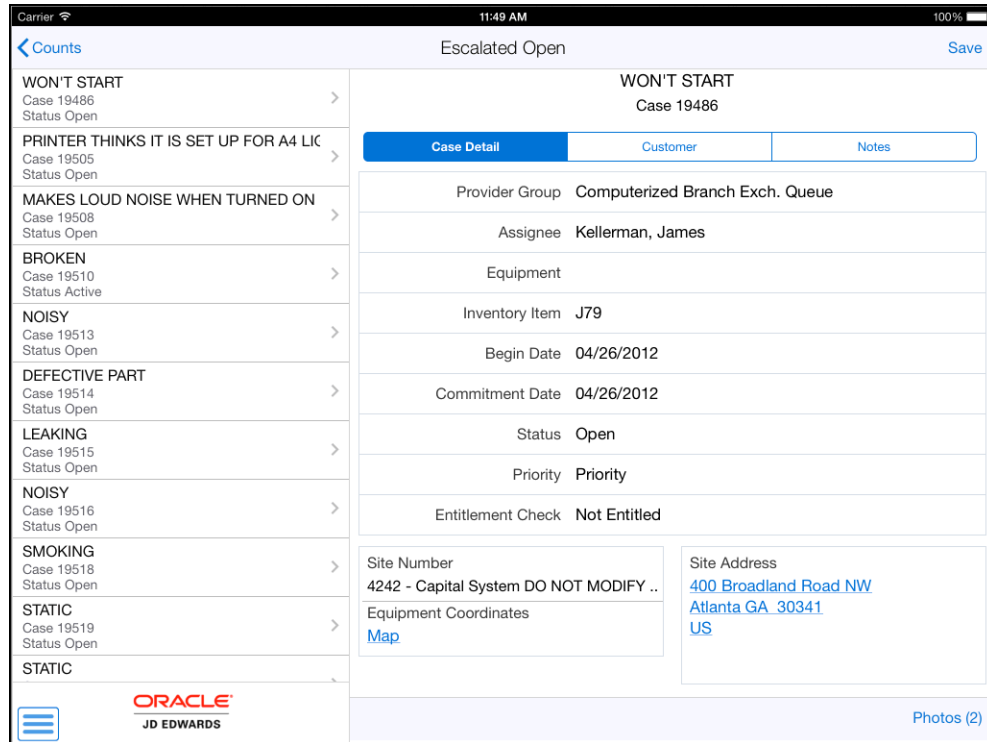
5. In the filters screen, to continue the search by using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of cases that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

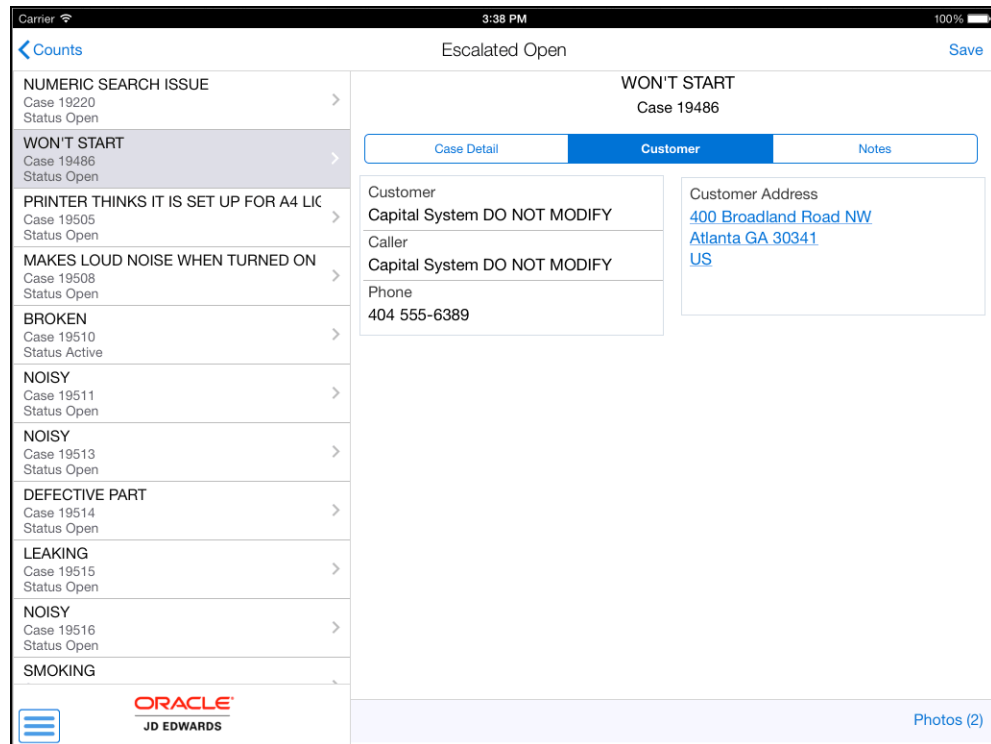
- Takes you to the screen that has the cases counts and graphs associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

Figure 17–2 Case Detail Tab



6. The first case on the list is displayed in the right pane of the screen.
7. Tap the data in the Site Address section, or the Map link in the Equipment Coordinates section, to use the device's map and navigational features.
8. To review details about a different case, tap the case. The selected case is highlighted in the case list. The Case Detail tab is open by default.
9. To review customer information, tap the Customer tab.

Figure 17-3 Customer Tab

10. Tap the data in the Customer Address section to use the device's navigational feature.
11. To review notes history and to enter new notes, tap the Notes tab.
12. To enter external notes that all users logging in to the JD Edwards EnterpriseOne system can access and view, tap the New External Notes field and enter texts. You can view previous external notes from the External Notes History field.
 To enter internal notes that only employees can access and view, tap the New Internal Notes field and enter texts. You can view previous internal notes from the Internal Notes History field
13. To view photos of the case, tap the Photos button. The number displayed on the Photos button represents the total number of photos attached to the case.
14. A list of photos appear as thumbnails in the left pane. In the right pane, the system displays the photo that appears first in the list.
 To view a photo, tap the photo thumbnail. To delete the photo, tap the Delete button. On the confirmation window that opens up, tap to confirm that you are deleting the photo. The system removes the photo from the list of photos.
 To add a photo to the case, tap the Add button. The system displays two options: Album and Camera.
 To attach an existing photo from your device's photo gallery to the case, tap the Album option.
 To take a new photo, tap the Camera option to use the device's camera feature.
15. You can add a description of the photo. To save the photo, tap the Save button. The system adds the photo to the list of photos, and increments the number of photos available by 1 (One).

To discontinue adding the photo and to go back to the Photos screen, tap the Cancel button.

- 16.** To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Review Team Service Orders Mobile Applications

This chapter discusses these topics:

- [Section 18.1, "Review Team Service Orders Mobile Applications Overview"](#)
- [Section 18.2, "Setting Up the Review Team Service Orders Mobile Applications"](#)
- [Section 18.3, "Using the Review Team Service Orders Mobile Tablet Application \(M17043\)"](#)
- [Section 18.4, "Using the Review Team Service Orders Mobile Smartphone Application \(M17044\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Understanding Field Service Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
 - "Assigning Labor to a Work Order" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
 - "Assigning Parts to a Work Order" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
-
-

18.1 Review Team Service Orders Mobile Applications Overview

You use the Review Team Service Orders mobile applications to easily review and update equipment service orders. You can use filters to search for service orders. For each service order, you can review equipment information, status and priority of the service order, planned start date, planned completion date, actual finish date, and failure description. You can also review the address and location details of the site where you must perform the service order, and use the device's map and navigational features to locate the site.

This table lists the applications that are available to review and update team service orders:

Type of Application	Additional Information
Base EnterpriseOne application	<p>To review and update service orders, use these applications in the JD Edwards EnterpriseOne system:</p> <ul style="list-style-type: none"> ■ Field Service Inquiry (P48100) ■ Field Service Revisions (P17100) ■ Work Order Parts Detail (P17730) ■ Work Order Labor Detail (P17732)
Tablet application	<p>Review Team Service Orders (M17043)</p> <p>To download the application to your tablet, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Review Team Service Orders
Smartphone application	<p>Review Team Service Orders (M17044)</p> <p>To download the application to your smartphone, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Review Team Service Orders

Before using the Review Team Service Orders tablet or smartphone applications, you:

- Set processing options for the Review Team Service Orders mobile applications (M17043 and M17044).
- Set processing options for the Field Service Inquiry program (P48100) to display all service orders.

18.1.1 Differences and Limitations: Equipment Search Results

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

When you work with notes for team service orders, the Review Team Service Orders mobile application for tablet uses the existing text attachments that are read-only. If you add any text to the existing notes, the device appends the new text to the existing text attachments for notes. You cannot change the already existing notes for any service order.

18.2 Setting Up the Review Team Service Orders Mobile Applications

Before using the Review Team Service Orders mobile applications (M17043 and M17044), you must set up the processing options of the applications in the JD Edwards EnterpriseOne system. You use the processing options to specify the versions of the programs that the system uses to process service order data for the mobile applications.

You also set up these processing options for the version of the Field Service Inquiry program (P48100) that you specify:

- Work Order Type: Set this processing option to use service orders.
- Only Show User's Work Orders: Set this processing option to display all service orders.

Note: When you log in to the mobile applications, the system looks at these processing options of the Field Service Inquiry program (P48100) and displays your service orders.

Note: Oracle recommends that you use the information provided here to set the processing options for your version of the Field Service Inquiry program (P48100). If you set the processing options differently, the Review Team Service Orders mobile applications will not behave as expected.

See:

- "Setting Processing Options for Field Service Work Orders" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

18.2.1 Setting Processing Options for the Review Team Service Orders Mobile Tablet Application (M17043)

You use processing options to specify default processing information for a program.

18.2.1.1 Versions

1. Field Service Inquiry (P48100) Version

Use this processing option to specify which version of the Field Service Inquiry program (P48100) the system uses. To process service orders, the Review Team Service Orders mobile tablet application (M17043) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0004.

2. Work Order Parts Detail (P17730) Version

Use this processing option to specify which version of the Work Order Parts Detail program (P17730) the system uses. To process service orders, the Review Team Service Orders mobile tablet application (M17043) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0002.

3. Work Order Labor Detail (P17732) Version

Use this processing option to specify which version of the Work Order Labor Detail program (P17732) the system uses. To process service orders, the Review Team Service Orders mobile tablet application (M17043) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0002.

18.2.2 Setting Processing Option for the Review Team Service Orders Mobile Smartphone Application (M17044)

You use processing options to specify default processing information for a program.

18.2.2.1 Versions

1. Field Service Inquiry (P48100) Version

Use this processing option to specify which version of the Field Service Inquiry program (P48100) the system uses. To process service orders, the Review Team Service Orders mobile smartphone application (M17044) uses the processing options of the

version that you specify. If you leave this processing option blank, the system uses ZJDE0004.

18.3 Using the Review Team Service Orders Mobile Tablet Application (M17043)

The Review Team Service Orders mobile tablet application (M17043) enables you to review details of equipment service orders. You can update the status of the service order, enter the actual date that you completed the service order, review parts and labor available for the service order, enter notes, and review previous notes.

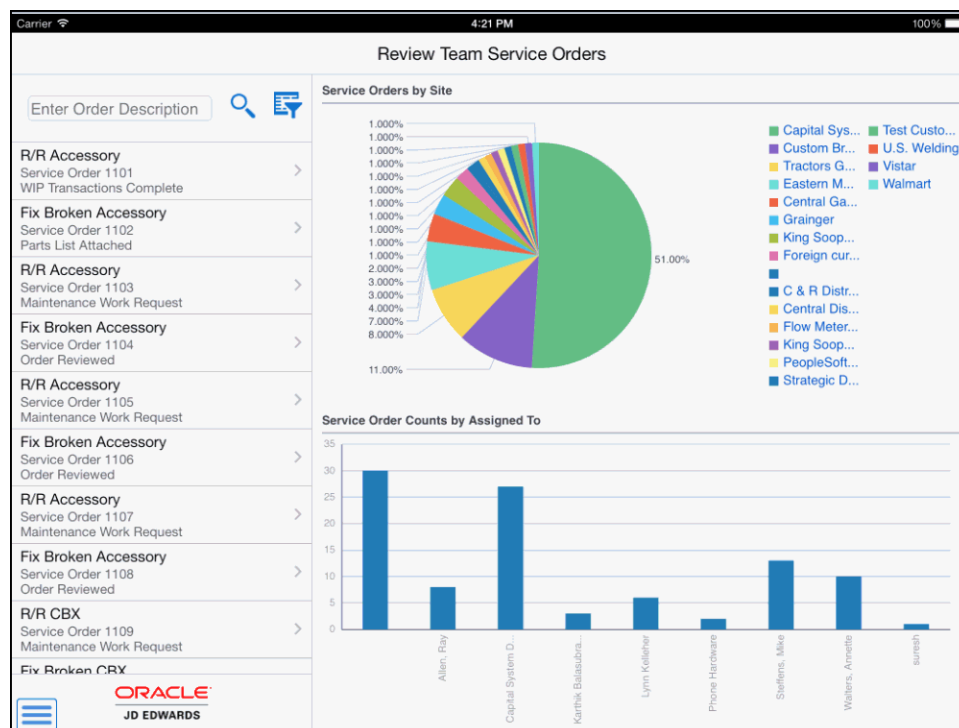
Before you can use the application, you must download and install the application from the application store on your device.

18.3.1 Reviewing and Updating Team Service Orders Using Mobile Tablet Application (M17043)

To review and update team service orders:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Review Team Service Orders home screen, enter the service order description partially or in whole in the Enter Order Description field to narrow the search to a specific service order. Then, tap the Search button next to the Enter Order Description field to search for service orders by description. Alternately, you can leave the Enter Order Description field empty and tap the Search button to retrieve all service orders.
3. From the Review Team Service Orders screen, review the service orders.

Figure 18–1 Review Team Service Orders Home Screen: Tablet



4. To filter service orders, tap the Filter icon at the top of the service order list.

Start Date

Tap the From and To dropdown menus and specify the service order start date range that the system uses to search for service orders.

Customer

This field retrieves the service orders based on the customer number of the orders. Specify the address book number for the customer for the service order.

Alternately, tap the Search button next to the Customer field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Supervisor

This field retrieves the service orders based on the supervisor number of the orders. Specify the address book number for the supervisor for the service order.

Alternately, tap the Search button next to the Supervisor field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Assigned To

This field retrieves the service orders based on the assigned-to value of the orders. Specify the Assigned To value for the service order.

Alternately, tap the Search button next to the Assigned To field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for service orders.

Priority

Tap the Priority dropdown menu and specify the priority that the system uses to search for service orders.

Service Order Number

Specify the service order that you want to review. Tap the Service Order Number field and enter the service order number.

5. In the Filters pane, to discontinue the search and to go back to the list of service orders, tap the Cancel button.

To delete the filter values you specified, and to enter new filter values, tap the Clear button.

To continue the search by using the filter values that you specified, tap the Apply button. The device displays the list of service orders based on the filter values that you specified.

6. To review and update a service order, tap the service order from the list of service orders.

Figure 18–2 Service Order Tab: Tablet

The screenshot displays the 'Review Team Service Orders' application on a tablet. The interface is divided into a left sidebar and a main content area. The sidebar lists several service orders, with 'Fix Broken Accessory Service Order 1104 Order Reviewed' selected. The main content area shows the details for this service order, including a header with the title 'Fix Broken Accessory Service Order 1104' and a 'Save' button. Below the header are four tabs: 'Service Order' (selected), 'Parts', 'Labor', and 'Notes'. The 'Service Order' tab displays the following information:

- Equipment: Capital System DO NOT MODIFY
- Priority: Med
- Current Status: 10 Order Reviewed (dropdown menu)
- Advance Status: Parts List Attached (hyperlink)
- Failure Description: BROKEN ACCESSORY
- Customer: Capital System DO NOT MODIFY
- Supervisor: Wen Zhu
- Assigned To: 2006 (with search icon) Walters, Annette
- Planned Start Date: Jun 1, 2011 (dropdown)
- Actual Finish Date: Feb 19, 2014 (dropdown)
- Planned Complete Date: Feb 19, 2014 (dropdown)
- Equipment Coordinates: Map (hyperlink)
- Contact: CAPITAL SYSTEM
- Site Address: 400 Broadland Road NW, Atlanta GA 30341 US

At the bottom of the screen, there are logos for ORACLE and JD EDWARDS, and a 'Photos' button.

The system displays service order header information and four tabs: Service Order, Parts, Labor, and Notes. The Service Order tab is open by default.

7. To update the service order details, perform these steps:

- To change the status of the service order, tap the Current Status dropdown menu and select a status.

You can also update the status of the service order by tapping the hyperlink in the Advance Status field.

Note: Based on the work order activity rules, the system displays the Advance Status button with the next status. If work order activity rules are not applicable for your service order, or if the status is complete and no more statuses are available, then this button does not appear.

- To update the assigned to value for the service order, tap the Assigned To field and enter the address book number for the Assigned to field.

Alternately, tap the Search button next to the Assigned To field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

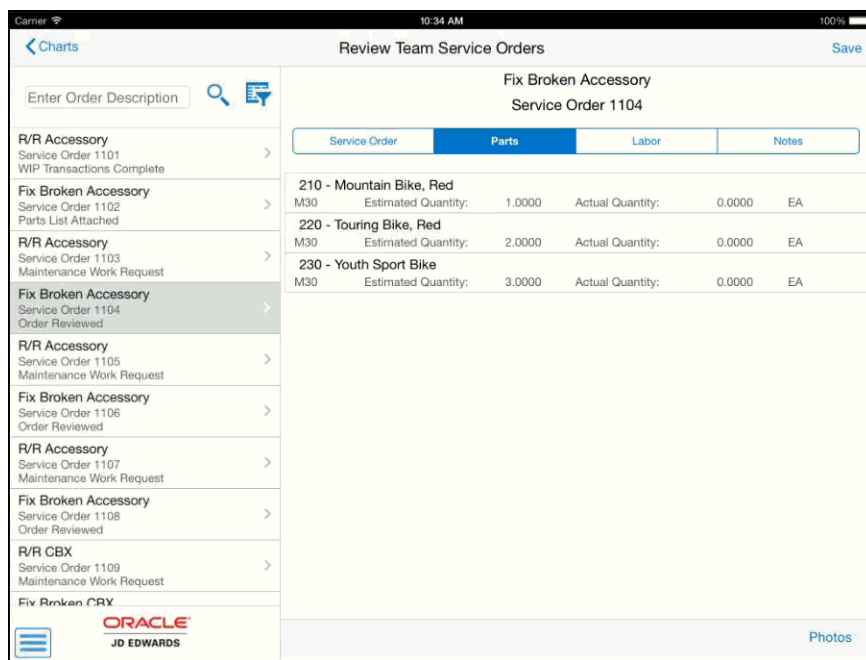
- To update the planned start date, tap the Planned Start Date calendar dropdown, and select the new date.
- To update the planned complete date, tap the Planned Complete Date calendar dropdown, and select the new date.

- To update the actual finish date, tap the Actual Finish Date calendar dropdown, and select the new date.
 - Tap the Save button.
8. To use the device's map and navigational features, tap the data in the Equipment Coordinates and Site Address sections of the form.

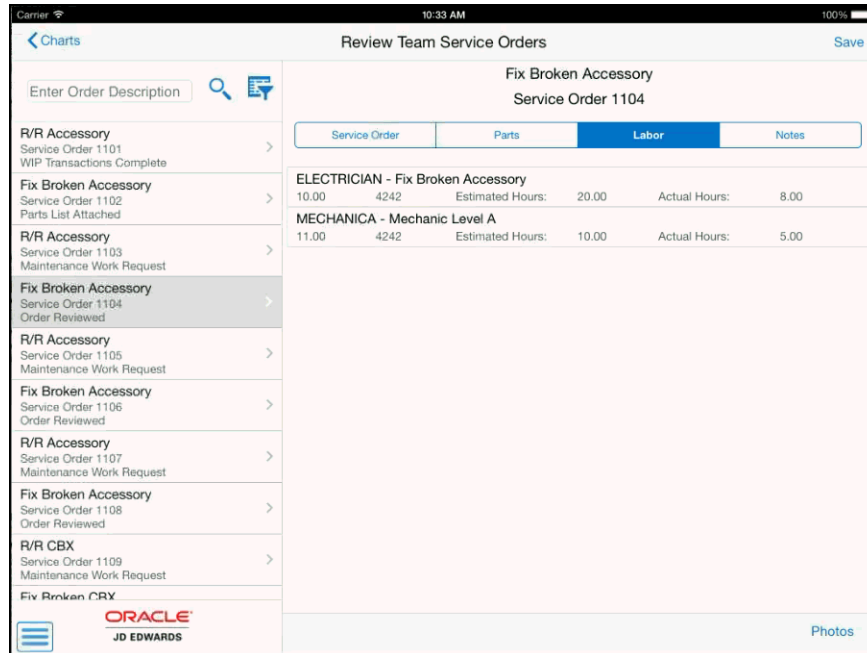
Note: The system displays the Map link only if the latitude and longitude values are available for the site location in the Equipment Master Address Locations program (P1704).

9. To review available parts for the service order, tap the Parts tab.

Figure 18–3 Parts Tab: Tablet



10. To review labor details for the service order, tap the Labor tab.

Figure 18–4 Labor Tab: Tablet

11. To enter notes and view notes history, tap the Notes tab. To enter new notes, tap the New Notes field. The device appends the new notes to the existing notes in the Notes History section.
12. To view photos, tap the Photos button. The device displays the options to view photos of the service order, or of the equipment associated with the service order. The number displayed with the Photos options represents the total number of photos related to the service order or the associated equipment. Tap the option that you want to select.
13. To view photos of the associated equipment, tap the Equipment Photos link.
To view photos of the service order, tap the Service Order Photos link.
14. To view a photo, tap the photo icon.

Note: The system displays service order photos from the media object in the Field Service Revisions program (P17100), and equipment photos from the media object in the Work with Equipment Master program (P1701).

15. You can add new photos to the service order. Tap the Service Order Photos link and then tap the Add button. The system displays two options: Album and Camera.
To attach an existing photo from your device's photo gallery to the service order, tap the Album option.
To take a new photo, tap the Camera option to use the device's camera feature.
16. The system adds the photo to the list of photos and increments the number of photos available by 1 (One).

Note: You cannot add photos when you select the Equipment photos tab. The photos that you see when you select the Equipment tab are called from the EnterpriseOne system.

17. To save and update the service order, tap the Save button.

If you navigate away from the service order record without saving your updates, you will lose unsaved changes.

18. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

18.4 Using the Review Team Service Orders Mobile Smartphone Application (M17044)

The Review Team Service Orders smartphone application (M17044) enables you to review details of team service orders.

Before you use the application, you must download and install the application from the application store on your device.

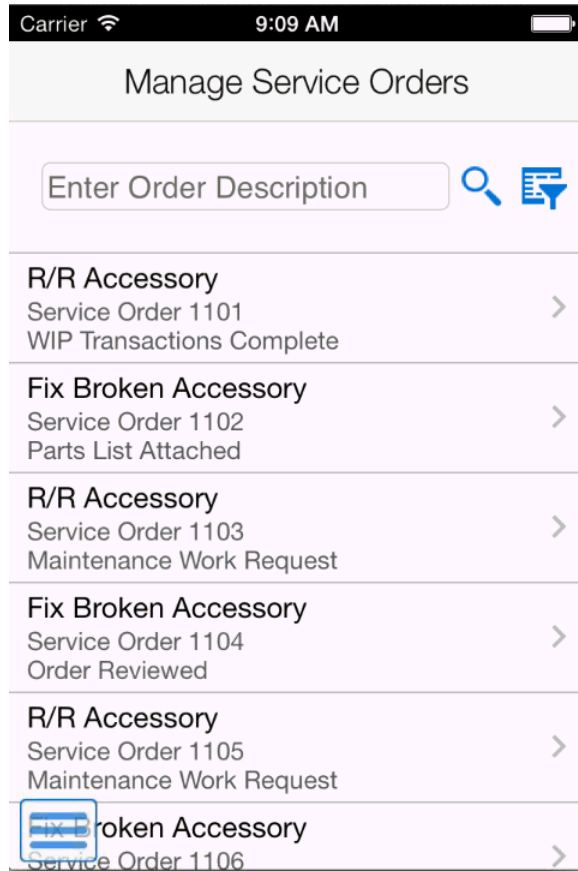
18.4.1 Reviewing Team Service Orders Using Mobile Smartphone Application (M17044)

To review team service orders:

1. Open the application by tapping the icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Manage Service Orders home screen, enter the service order description in the Enter Order Description field to narrow the search to a specific service order. Then, tap the Search button next to the Enter Order Description field to search for service orders by description. Alternately, you can leave the Enter Order Description field empty and tap the Search button to retrieve all service orders.
3. From the Manage Service Orders screen, review the service orders.

Figure 18–5 Manage Service Orders: Smartphone

- To filter service orders, tap the Filter icon at the top of the service order list.

Start Date

Tap the From and To dropdown menus and specify the service order start date range that the system uses to search for service orders.

Customer

Specify the address book number for the customer for the service order.

Alternately, tap the Search button next to the Customer field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Supervisor

Specify the address book number for the supervisor for the service order.

Alternately, tap the Search button next to the Supervisor field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Assigned To

Specify the Assigned To address value for the service order.

Alternately, tap the Search button next to the Assigned To field, and then tap the Search button on the Address Book window. You can also search by entering a description in the Search Description field.

Status

Tap the From and To dropdown menus and specify the status range that the system uses to search for service orders.

Priority

Tap the Priority dropdown menus and specify the priority range that the system uses to search for service orders.

Service Order Number

Specify the service order that you want to review. Tap the Service Order Number field and enter the service order number.

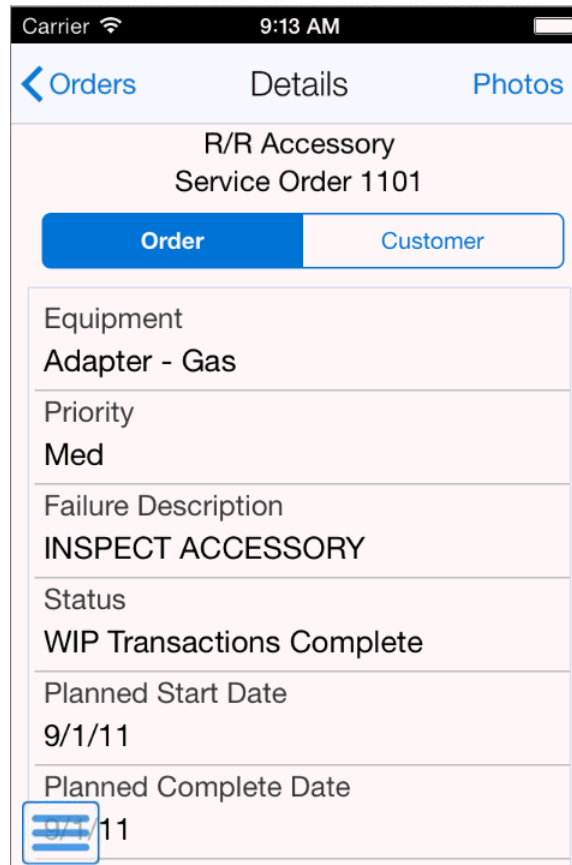
- In the Filters screen, to discontinue the search and to go back to the list of service orders, tap the Cancel button.

To delete the filter values you specified, and to enter new filter values, tap the Clear button.

To continue the search by using the filter values that you specified, tap the Apply button. Tapping the Apply button takes you to the Review Team Service Orders screen that displays service orders based on your filter values.

- To review a service order, tap the service order from the list of service orders.

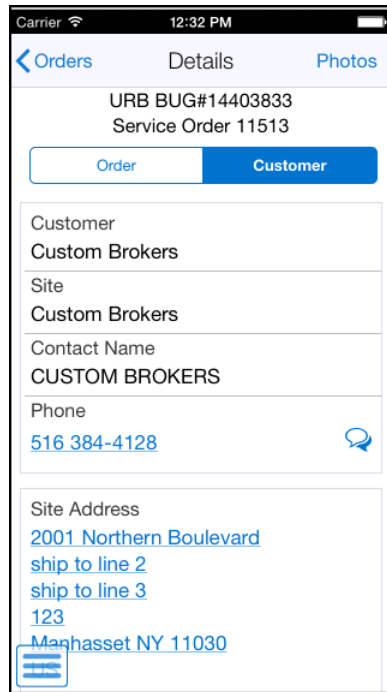
Figure 18–6 Order Tab: Smartphone



The system displays service order header information and two tabs: Order and Customer. The Order tab is open by default. To use the device's map feature, tap the Map hyperlink in the Equipment Coordinates section.

Note: The system displays the Map link only if the latitude and longitude values are available for the site location in the Equipment Master Address Locations program (P1704).

Figure 18–7 Site Details Tab: Smartphone



7. To view customer details, tap the Customer tab. To use the device's navigational feature, tap the Site Address section of the screen.
8. To call the customer, tap the phone number and to text the customer, tap the Text button in the Phone field.
9. To view photos, tap the Photos button. The device displays the options to view photos of the service order, or of the equipment associated with the service order. The number displayed with the Photos options represents the total number of photos related to the service order or the associated equipment. Tap the option that you want to select.
10. To view photos of the associated equipment, tap the Equipment Photos link.
To view photos of the service order, tap the Service Order Photos link.
11. To view a photo, tap the photo icon.

Note: The system displays service order photos from the media object in the Field Service Revisions program (P17100), and equipment photos from the media object in the Work with Equipment Master program (P1701).

12. You can add new photos to the service order. Tap the Service Order Photos link and then tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the service order, tap the Album option.

To take a new photo, tap the Camera option to use the device's camera feature.

13. You can zoom in and zoom out photos for display. To zoom in, pinch and drag the part of the photo that you want to zoom in. To zoom out, drag and pinch the photo.

Note: The zoom feature is not available on Android devices.

14. The system adds the photo to the list of photos and increments the number of photos available by 1 (One).

Note: You cannot add photos when you select the Equipment photos tab. The photos that you see when you select the Equipment tab are called from the EnterpriseOne system.

15. To go back to the Order or Customer screen, tap the Back button.
16. To go back to the list of service orders, tap the Orders button.
17. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Service Order Time Entry Mobile Applications

This chapter discusses these topics:

- [Section 19.1, "Service Order Time Entry Mobile Applications Overview"](#)
- [Section 19.2, "Setting Up the Service Order Time Entry Mobile Applications"](#)
- [Section 19.3, "Using the Service Order Time Entry Mobile Tablet Application \(M3112211\)"](#)
- [Section 19.4, "Using the Service Order Time Entry Mobile Smartphone Application \(M3112212\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- *Managing Work Orders in the JD Edwards EnterpriseOne Service Management Implementation Guide.*
-
-

19.1 Service Order Time Entry Mobile Applications Overview

You use the Service Order Time Entry mobile applications to enter time entry for service work orders. You can use filters or history to search for service order time entry. For each service order, you can enter, update, review, and delete time entry information, status of the work order, processed records, shift code, operational sequence, hours, and work date.

This table lists the applications that are available to review and update existing service order time entries, and to enter new service order time entries:

Type of Application	Additional Information
Base EnterpriseOne application	To review and update existing timecards, and to enter new timecards for service orders, use the Work Order Time Entry program (P311221) in the JD Edwards EnterpriseOne system.
Tablet application	Service Order Time Entry (M3112211) To download the application to your tablet, search on the following text in the application store: JD Edwards Service Time Entry

Type of Application	Additional Information
Smartphone application	Service Order Time Entry (M3112212) To download the application to your tablet, search on the following text in the application store: JD Edwards Service Time Entry

19.1.1 Differences and Limitations: Service Order Time Entry

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The functions of the Service Order Time Entry mobile applications are not different from the base EnterpriseOne applications. However, the Service Order Time entry mobile applications, do offer the user a subset of service order timecards information. Not all the service order timecards information available in the base software is available in the mobile applications.

Barcode Scanning (Release 9.1 Update)

The Service Order Time Entry mobile tablet application (M3112211) and the Service Order Time Entry mobile smartphone application (M3112212) are designed to scan data from a barcode and populate the service order number in the Service Order Number field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

19.2 Setting Up the Service Order Time Entry Mobile Applications

Before using the Service Order Time Entry mobile applications, verify that the processing options for each application are set correctly. The processing options for both the tablet and the smartphone applications specify the versions of the base EnterpriseOne applications that the mobile applications use.

The system administrator must set the processing options for these mobile applications before the applications are made available to end users.

See *Setting Processing Options for the Work Order Time Entry Program (P311221)* in the *JD Edwards EnterpriseOne Service Management Implementation Guide*.

(Release 9.1 Update) You can use one of the following options to scan barcodes of service order number:

- Disable the Bluetooth option in the settings on your device if you want to use the native device camera to scan the barcodes of service order number.
- Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes of service order number.

To scan barcodes using the Bluetooth scanning device, you must configure the scanning device to the mobile device.

19.2.1 Setting Processing Options for the Service Order Time Entry Mobile Tablet Application (M3112211)

You use processing options to specify default processing information for a program.

19.2.1.1 Versions

1. Work Order Time Entry (P311221) Version

Use this processing option to specify the version of the Work Order Time Entry program (P311221) the system uses. If you leave this processing option blank, then the system uses version ZJDE0001.

19.2.2 Setting Processing Options for the Service Order Time Entry Mobile Smartphone Application (M3112212)

You use processing options to specify default processing information for a program.

19.2.2.1 Versions

1. Work Order Time Entry (P3112212) Version

Use this processing option to specify the version of the Work Order Time Entry program (P311221) the system uses. If you leave this processing option blank, then the system uses version ZJDE0001.

19.2.3 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Service Order Time Entry mobile tablet application (M3112211) and the Service Order Time Entry mobile smartphone application (M3112212) include the Service Order Number field in two locations in the application. One is in the filter screen; another is in the Service Order Time Entry screen for tablet and Details screen for smartphone that display when you add a new service order timecard. You use the Service Order Number filter to filter records by service order number. When you enter a new service order timecard using the Service Order Time Entry tablet and smartphone applications, you must enter the service order number in the Service Order Number field.

You can populate the Service Order Number field (in the filter screen as well as in the add new service order timecard screen) using the following options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option on your device, the system may disable the device's keyboard.

19.3 Using the Service Order Time Entry Mobile Tablet Application (M3112211)

The Service Order Time Entry tablet application enables you to review details of the service order time entry that is assigned to you. You can update the work order number, number of hours worked, work date range (from and to date), operational sequence, and status of the work order.

Before you can use the application, you must download and install the application from the application store on your device.

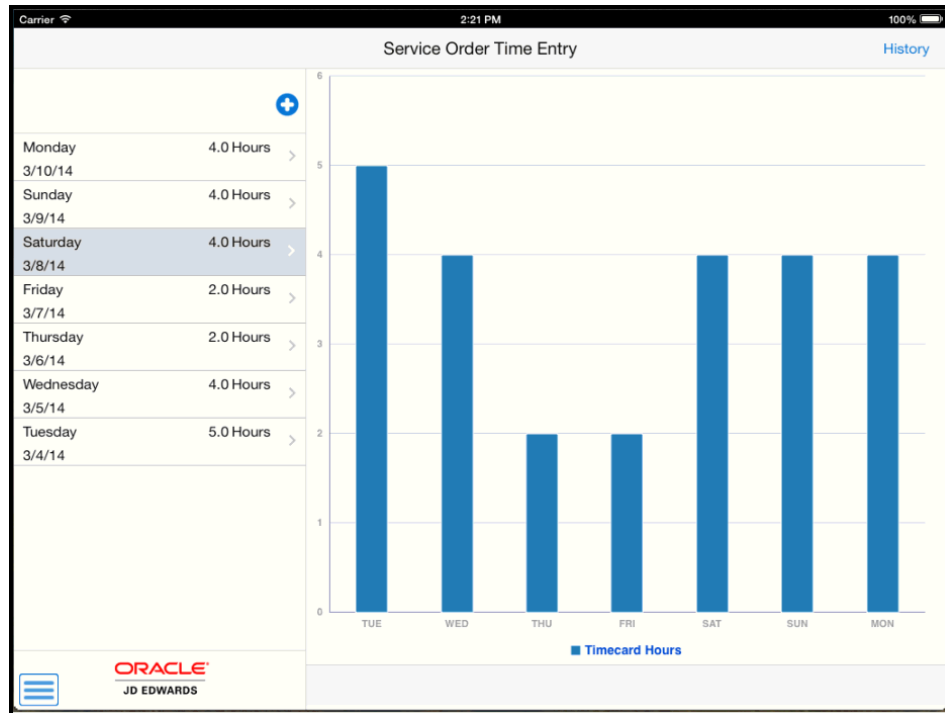
To open the application, tap the icon and log in.

19.3.1 Reviewing and Updating Service Order Time Entries Using a Mobile Tablet Application

To review and update service order time entry on your tablet:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Service Order Time Entry home screen, review the timecards for the past seven days.

Figure 19–1 Service Order Time Entry



This graphic is described in surrounding text.

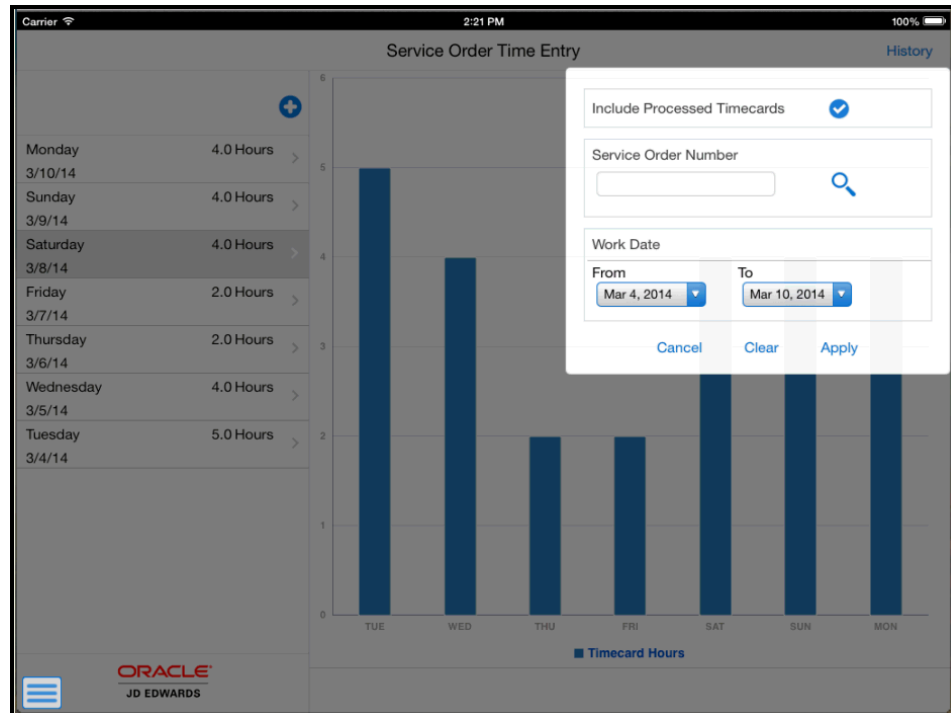
The system displays a list of timecards that were entered one week prior to the system date. To refresh the data on the screen, swipe down on the panel with the list of timecards.

Note that the timecards displayed in the list are also graphically displayed on the right side of the screen.

- To search service order timecards, tap the History button at the top of the Service Order Time Entry list.

Note: The History button is available only on the home screen. You can use either the History or the Filter button in the application to search for service order timecards.

Figure 19–2 Service Order Time Entry - History



Include Processed Timecards

To Include processed timecards, tap the Include Processed Timecards check box.

Service Order Number (Release 9.1 Update)

Enter data in the Service Order Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of service order.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Service Order Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Service Order Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 19.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Work Date

To select the work date range to display specific service order timecard, tap the Work Date dropdown menus.

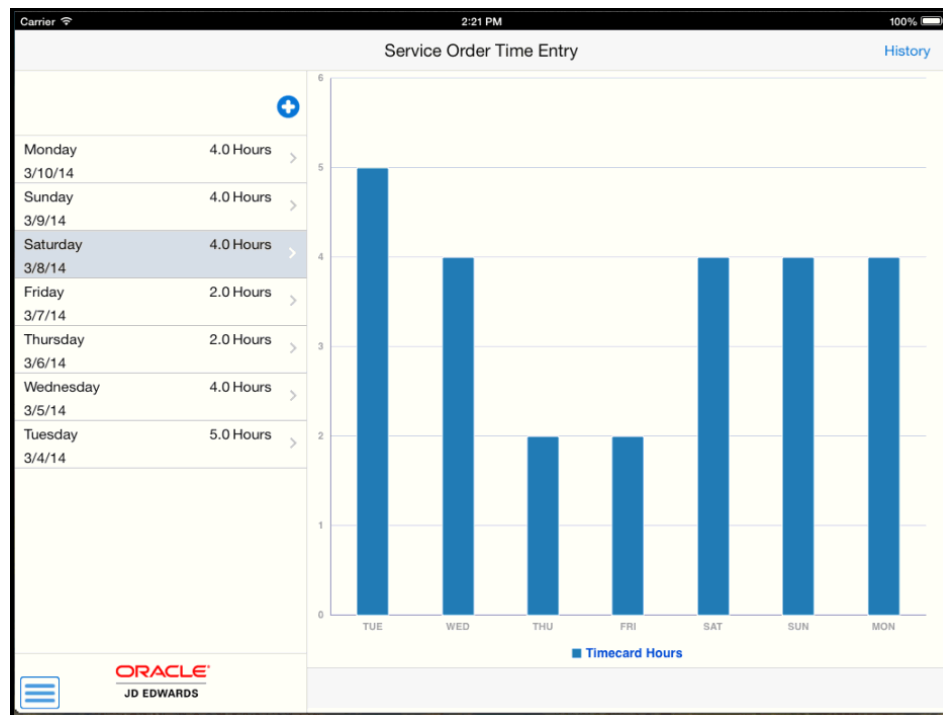
To continue the search, tap the Apply button.

To discontinue the search, tap the Cancel button.

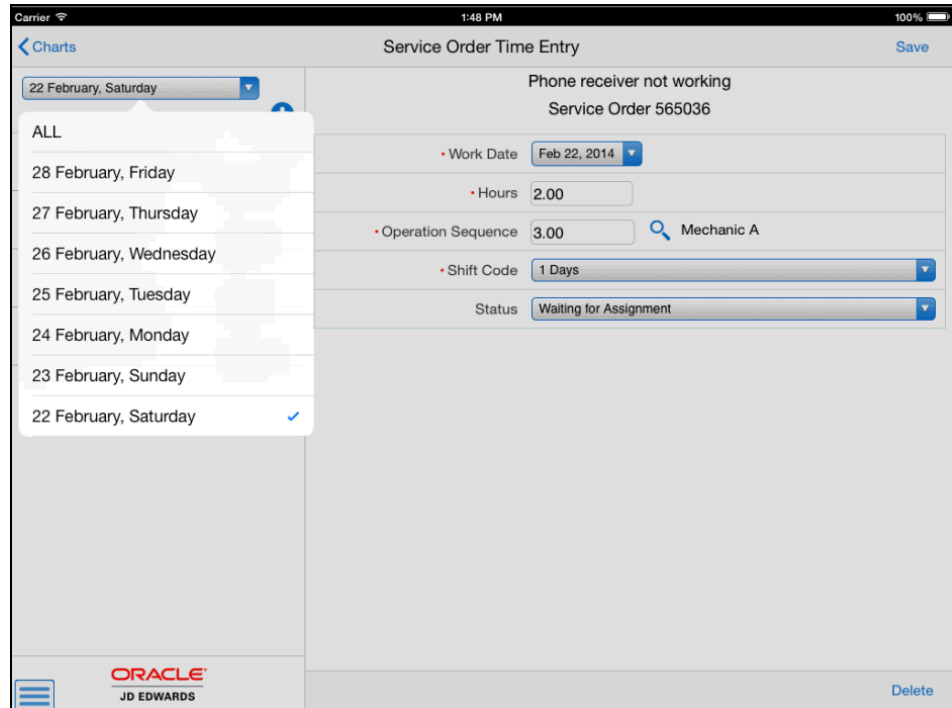
To delete all the search values you specified, and to enter new search values, tap the Clear button.

4. To view detailed information of a specific service order timecard, tap the timecards in the left pane, or the bar in the graph that coincides with the timecard you want to view.

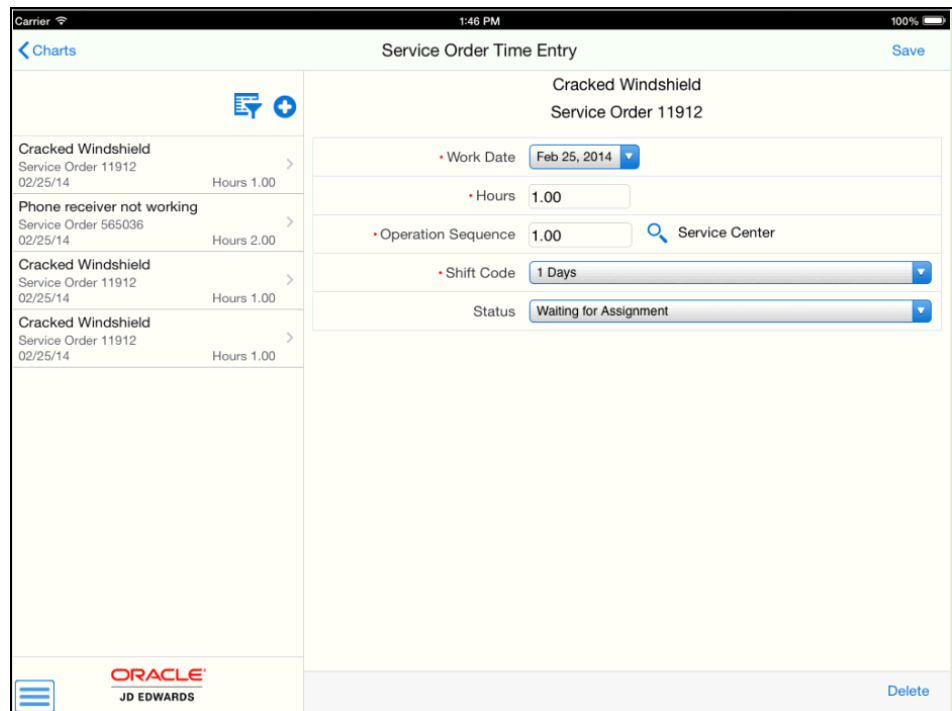
Figure 19–3 Service Order Timecards



5. To review service order timecards for a specific day, tap the day dropdown menu in the left pane and select an option from the list.

Figure 19–4 Service Order Time Entry - Days

- To review and update service order timecard information for a specific timecard, tap the timecard on the left pane.

Figure 19–5 Service Order Time Entry - Edit

On the Service Order Time Entry screen, you cannot edit the work order number and the work order description.

Select the values for the work date, shift code and status from the respective dropdown menus. Then, enter the timecard details, and tap Save.

Use the Search icon to search for and select a value for the Operation Sequence field.

7. To save the updated service order timecard, tap Save button.
8. To delete an existing service order timecard, tap Delete button.

When you tap the Delete button, the system displays a message **Confirm Delete Yes or No**.

If you select *Yes*, the system deletes the timecard from the time entry list.

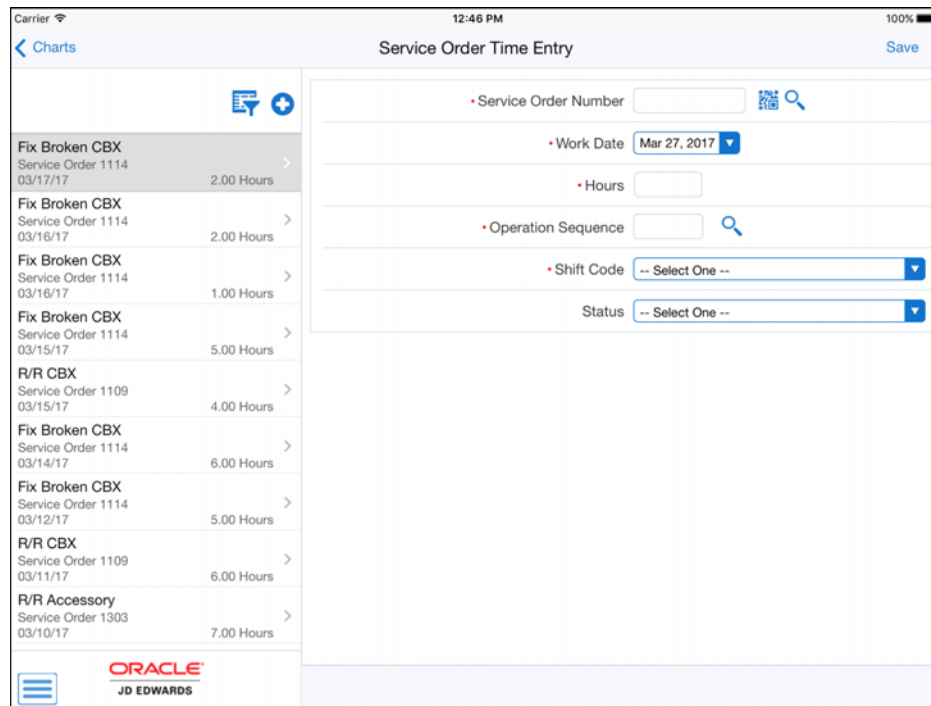
If you select *No*, the system returns to the Service Order Time Entry screen.

19.3.2 Entering Service Order Timecards Using a Mobile Tablet Application

To enter a service order timecard on your tablet:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. To add new timecards, tap the Add icon at the top right of the Service Order Time Entry list.

Figure 19–6 Service Order Time Entry - Add



On the Service Order Time Entry screen, select the values for the work date, shift code, and status from the respective dropdown menu.

Service Order Number (Release 9.1 Update)

Enter data in the Service Order Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of service order.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Service Order Number field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Service Order Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.
See [Section 19.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Enter the Hours details and tap Save.

Use the Search icon to select for and select a value for the Operation Sequence field.

After, you add the timecard, tap the Save button.

The system displays a message **Record Created**. The system updates and displays the new timecard in the left pane.

3. To return to the home screen, tap Charts button.
4. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

19.4 Using the Service Order Time Entry Mobile Smartphone Application (M3112212)

The Service Order Time Entry smartphone application enables you to review and update service work order timecards.

Before you can use the application, you must download and install the application from the application store on your device.

19.4.1 Reviewing and Updating Service Order Time Entries Using a Mobile Smartphone Application

To review service order time entry on your smartphone:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Service Order Time Entry screen, review the service order timecards.

Figure 19–7 Service Time Entry

Day	Date	Hours
Friday	2/28/14	0 Hours
Thursday	2/27/14	3.0 Hours
Wednesday	2/26/14	2.0 Hours
Tuesday	2/25/14	6.0 Hours
Monday	2/24/14	6.0 Hours
Sunday	2/23/14	6.0 Hours
Saturday	2/22/14	6.0 Hours

- To filter timecards, tap the Filter button at the top left of the Service Time Entry list.

Work Date

Tap the From and To dropdown menus to specify the service order start date range that the system uses to search for a specific timecard.

Include Processed Timecards

Tap the Include Processed Timecards to include the processed timecards.

Service Order Number (Release 9.1 Update)

Enter data in the Service Order Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of service order.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Service Order Number field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Service Order Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 19.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

- In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of timecards that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen
5. To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:
- Takes you to the list of timecards associated with the last saved filter values, if applicable.
 - Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.
- To delete all filter values you specified, and to enter new filter values, tap the Clear button.
6. To review and update timecards, tap the existing service order timecards from the list.

Figure 19–8 Service Time Entry - Edit

The screenshot shows a mobile application interface for editing a service order timecard. At the top, there is a status bar with 'Carrier', signal strength, '1:50 PM', and battery level. Below that is a navigation bar with a back arrow labeled 'List', the title 'Details', and a 'Save' button. The main content area displays the following information:

- Service Order Description: Phone receiver not working
- Service Order Number: Service Order 565036
- Date: Feb 25, 2014 (with a dropdown arrow)
- Hours: 2.00 (with a text input field)
- Operation Sequence: 2.00 (with a text input field and a magnifying glass icon)
- Shift Code: 1 Days (with a dropdown arrow)
- Status: Waiting for Assignment (with a dropdown arrow)

At the bottom of the screen, there is a hamburger menu icon on the left and a 'Delete' button on the right.

The system displays the work order number and work order description by default, based on your timecard selection. You cannot edit the work order number and work order description.

In the Details screen, you can update the work date, hours, operation sequence, shift code, and status information for a specific service order timecard.

To save the service order timecard information, tap the Save button

To go back to the home screen, tap the List button.

To delete the timecard, tap the Delete button.

When you tap Delete button, the system displays a message **Confirm Delete Yes or No**.

If you select **Yes**, the system deletes the timecard from the time entry list.

If you select **No**, the system return to the Equipment Work Order Time Entry screen.

19.4.2 Entering Service Order Time Entry Using a Mobile Smartphone Application

To enter service order time entry on your smartphone:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. To add new timecards, tap Add button at the top left of the Service Time Entry list.

Figure 19–9

On the Details screen, select the values for work date, shift code, and status from the respective dropdown menus.

Service Order Number (Release 9.1 Update)

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of service order.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Service Order Number field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Service Order Number field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 19.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Enter the Hours details and tap Save.

Enter data in the Service Order Number field using one of these options:

Use the Search icon to search for and select a value for the Operation Sequence field.

After, you add the timecard, tap the Save button.

- 3.** To go back to the home screen, tap the Counts button.
To save your changes and to go back to the list of timecards, tap the Save button.
- 4.** To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Part III

Financial Management Solutions

This part contains the following chapters:

- [Chapter 20, "Contact Customer Mobile Applications"](#)
- [Chapter 21, "Contact Supplier Mobile Application"](#)
- [Chapter 22, "Customer Account Overview Mobile Applications"](#)
- [Chapter 23, "Expense Approval Mobile Applications"](#)
- [Chapter 24, "Expense Entry Mobile Applications"](#)
- [Chapter 25, "G/L Batch Approvals Mobile Applications"](#)
- [Chapter 26, "Invoice Batch Approvals Mobile Applications"](#)
- [Chapter 27, "Payment Batch Approvals Mobile Applications"](#)
- [Chapter 28, "Receipt Batch Approvals Mobile Applications"](#)
- [Chapter 29, "Voucher Batch Approvals Mobile Applications"](#)

Contact Customer Mobile Applications

This chapter discusses these topics:

- [Section 20.1, "Contact Customer Mobile Applications Overview"](#)
- [Section 20.2, "Setting Up the Contact Customer Mobile Applications"](#)
- [Section 20.3, "Using the Contact Customer Mobile Tablet Application"](#)
- [Section 20.4, "Using the Contact Customer Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Setting Up Customer Master Information in the JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide](#)
 - [Entering Address Book Records in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide](#)
 - [Using Address Book Geocoding in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide](#)
 - [Address Book in the JD Edwards EnterpriseOne Applications Business Interface Implementation Guide.](#)
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-

20.1 Contact Customer Mobile Applications Overview

You use the Contact Customer mobile applications to view customer contact information on your mobile device. The smartphone and tablet applications enable you to:

- View customer address information.
- View customer contacts.
- Add customer contact information to your device.
- Use mapping and navigation features of your device to locate the customer site.
- Send emails to customer contacts.
- Call customer contacts (smartphone only).

- Search for customers within a user-defined proximity (Release 9.1 Update).

Note: The Contact Customer mobile applications are inquiry-only, and cannot be used to update customer information in the EnterpriseOne database.

This table lists the applications that are available to view customer contact information:

Type of Application	Additional Information
Base EnterpriseOne Application	Use these applications in the JD Edwards EnterpriseOne system to view customer contact information: <ul style="list-style-type: none"> ■ Customer Master (P03013) ■ Address Book Revisions (P01012) ■ Revise Who's Who (P0111) ■ Revise Phone Numbers (P0115) ■ Contact Information (P01111)
Tablet Application	Mobile Contact Customer - Tablet (M030010) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Contact Customer
Smartphone Application	Mobile Contact Customer - Phone (M03015) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Contact Customer

Before using the Contact Customer tablet or smartphone application, you must complete the following setup and configuration tasks:

- Set the processing options for both applications.
Complete this task in the EnterpriseOne system.
- Set preferences.
Complete this task using the mobile devices.

20.1.1 Differences and Limitations: Contact Customer

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Customer Data Displayed

While the Contact Customer mobile applications do not function differently than base EnterpriseOne applications, they do offer the mobile user a subset of customer information. Not all customer information available in the base software is available in the mobile applications.

Adding Contact to Device

When reviewing customer contacts in the mobile application, you can add the EnterpriseOne contact to your mobile device. When you tap the Create Device Contact

button, the system looks in your device contacts for an exact match of the contact name to determine whether the contact exists on your device already. The system does not check for duplicate phone numbers or email addresses. Therefore, if the contact already exists on your device, but the name is not exactly the same as the contact name in the mobile application, it is possible to create a duplicate contact record on your device.

Additionally, if an exact match is found, and the contact already exists on the phone, the mobile application does not update the existing device contact with the phone numbers and email addresses from the mobile application contact record.

To enable the Create Device Contact button on your iOS mobile device, you must set the privacy settings for contacts to allow the application to access contact information. If the setting is not turned on, the Create Device Contact button does not appear in the application.

This button is enabled by default in Android devices.

Searching Customers Based on Proximity (Release 9.1 Update)

To search for customers within a specific proximity to your location or another reference point, you use the Location Services functionality available in the Contact Customer mobile applications.

You can search for customers based upon their proximity to your current location, a specific street address, or a specific customer's location. You can also specify a specific number of miles or kilometers as the radius for the search. The search is done based upon the coordinates (latitude and longitude) of the reference location and those of your customers. In order to use your current location as the reference point, you must allow the application to access your location on your device.

20.2 Setting Up the Contact Customer Mobile Applications

Before using the Contact Customer mobile applications, verify that the processing options for each application are set correctly. The processing options for both the tablet and the smartphone applications specify which versions of the base EnterpriseOne applications the mobile applications use. Additionally, the processing options for the tablet application are used to specify which category codes to display in the application.

Setting processing options for these applications is a task that should be completed by the system administrator before the mobile applications are made available to end users.

End users of the mobile applications also have the ability to set up user preferences within the mobile applications. These preferences enable users to show or hide the following fields in the mobile applications:

- Function Code
- Type Code
- Contact Type

End users of the mobile applications also have the ability to set up user preferences to search for customers within a user-defined proximity. These preferences enable users to show or hide customers within a specific proximity to your location or another reference point (Release 9.1 Update).

You can also set the privacy settings on your iOS device to enable the Create Device Contact feature, which enables you to add an EnterpriseOne contact to your device contacts.

To access the privacy settings on an iOS device:

1. Select Settings, then select Privacy, then select Contacts.
2. Enable the option for all applications that you want to have access to your device contacts.

This button is enabled by default in Android devices.

20.2.1 Setting Processing Options for the Mobile Contact Customer - Tablet Application (M030010)

You use processing options to specify default processing and display information for a program.

20.2.1.1 Versions

1. P01012 Version

Use this processing option to specify the version of the Address Book Revisions program (P01012) that the mobile application uses to process customer and contact address information. If this option is left blank, the system uses version ZJDE0001.

2. P03013 Version

Use this processing option to specify the version of the Customer Master program (P03013) that the mobile application uses to process customer information. If this option is left blank, the system uses version ZJDE0001.

3. P01111 Version

Use this processing option to specify the version of the Contact Information program (P01111) that the mobile application uses to process customer and contact email information. If this option is left blank, the system uses version ZJDE0001.

20.2.1.2 Category Codes

1. Category Code 01 through 10. Category Code 10

Use these options to specify which Customer Master Category Code to display in each of the ten available fields on the Category Codes tab of the tablet application. For example, if you want Category Code AC01 to display in the first field on that tab, enter AC01 in processing option 1. If you want Category Code AC04 to display in the second field on the tab, enter AC04 in processing option 2.

The system displays the description from the data dictionary as the display text for the field. For example, if the display text for AC01 is "Warehouse", field 1 on the Category Codes tab of the application will display as "Warehouse". You can display up to ten category codes on the tab. Values include:

- Blank: Do not display a category code in this field.
- AC01 - AC30: Display this category code in this field.

Note: If all category code processing options are left blank, the application does not display the Category Code tab.

20.2.2 Setting Processing Options for the Mobile Contact Customer - Phone Application (M03015)

You use processing options to specify default processing information for a program.

20.2.2.1 Versions

1. P01012 Version

Use this processing option to specify the version of the Address Book Revisions program (P01012) that the mobile application uses to process customer and contact address information. If this option is left blank, the system uses version ZJDE0001.

2. P03013 Version

Use this processing option to specify the version of the Customer Master program (P03013) that the mobile application uses to process customer information. If this option is left blank, the system uses version ZJDE0001.

3. P01111 Version

Use this processing option to specify the version of the Contact Information program (P01111) that the mobile application uses to process customer and contact email information. If this option is left blank, the system uses version ZJDE0001.

20.2.3 Setting User Preferences for the Contact Customer Mobile Applications

To set these preferences, access the Settings on your mobile device, select the application you want to configure, and set each field to On (display) or Off (do not display).

Figure 20–1 Setting User Preferences (Release 9.1 Update)

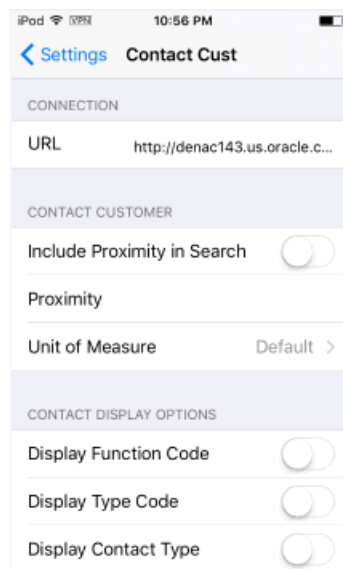
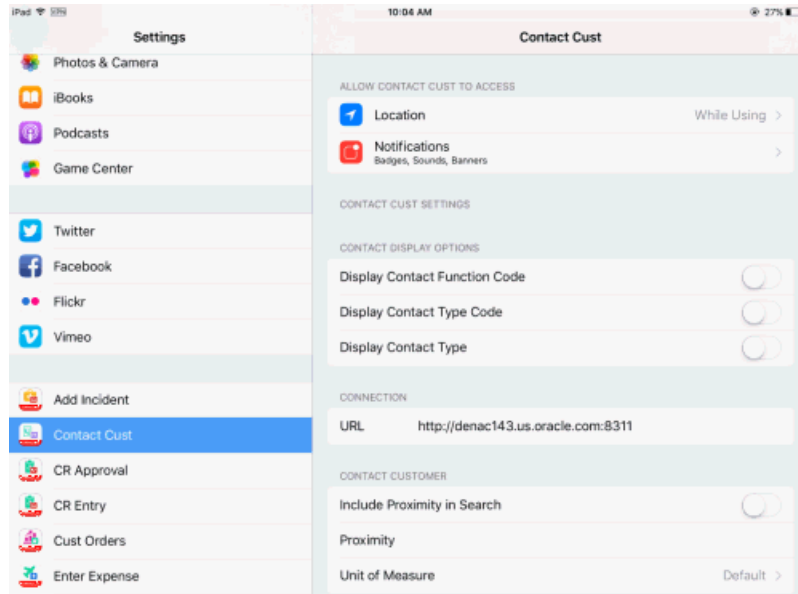


Figure 20–2 Setting User Preferences (Release 9.1 Update)

For instructions about accessing the settings on your mobile device, see the user documentation for your device.

Note: Entering connection information in the URL field is discussed in a separate task. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

20.2.3.1 Setting User Preferences for Using Proximity Information for Customer Search (Release 9.1 Update)

You set up the user preferences for the Contact Customer mobile applications to search for customers located within a radius. To set these preferences, access the Setting screen on your mobile device, and set the Include Proximity in Search option to On (display) or Off (do not display).

After you enable the Include Proximity in Search option, you can set the Proximity and Unit of Measure preference fields. In the Proximity preference field, you can enter a numerical value for the radius within which the system locates the customer. In the Unit of Measure preference field, you can specify whether to use Miles or Kilometers for the radius.

20.3 Using the Contact Customer Mobile Tablet Application

Use the Contact Customer tablet application (M030010) to:

- View customer address information.
- View customer contacts.
- Add customer contact information to your device.
- Use mapping and navigation features of your device to locate the customer site.
- Send emails to customer contacts.
- View customer category code information.

- Search for customers within a user-defined proximity (Release 9.1 Update).

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

20.3.1 Using the Contact Customer Mobile Tablet Application

To view customer contact information on your tablet:

1. Open the application by tapping the icon on your device, and then log in.

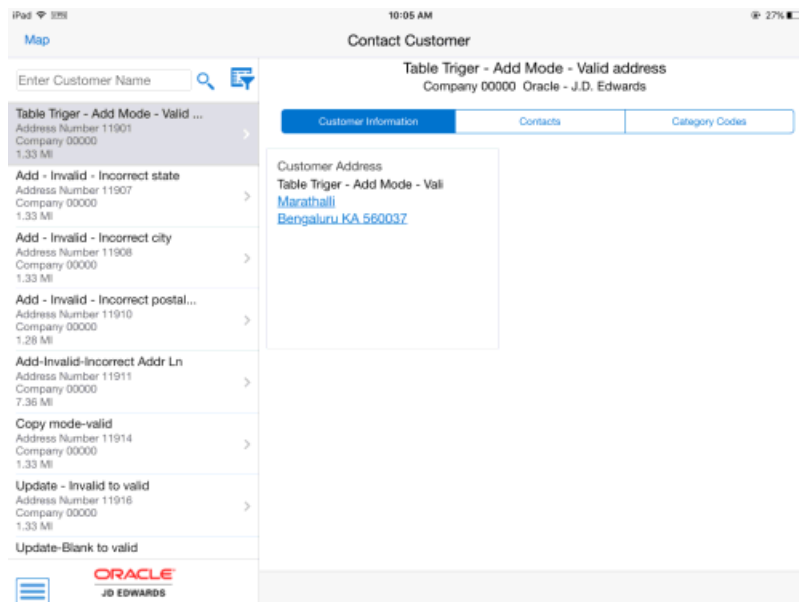
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. On the Contact Customer Home screen, enter the customer name and tap Search.

Note that the first record in the list of search results is displayed in the right side of the screen.

3. Select a customer record to view customer information.

Figure 20–3 Contact Customer Screen, Customer Information Tab



On this screen you can:

- Tap the customer address to use the map and navigation capabilities of your mobile device.
 - Tap the email address to compose an email to the customer.
 - Tap the customer url to open a browser application to view the web site on your device.
4. To view contact information for the selected customer, tap the Contacts tab. The device displays a list of contacts associated with the customer.
 5. To view detailed information about a specific contact, tap the contact record.

On this screen you can:

- Tap the email address to compose an email to the customer.

- Tap the url, if available, to open a browser application to view the web site on your device.
- 6. Tap the Create Device Contact button to add the contact record to your device contacts. If the contact does not already exist, the system adds the contact to your device and displays a confirmation message, Contact Added. If the contact already exists, the system does not update anything, and returns a message, Contact Exists.

Note that the Create Device Contact button is displayed only if the device settings are set to enable the application to access the contact information for the device.
- 7. Tap the Category Codes tab to view additional information about the customer. Note that this tab is available only if the application has been set up to display category codes.
- 8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

20.3.2 Searching for Customers within a User-Defined Proximity Using the Contact Customer Mobile Tablet Application (Release 9.1 Update)

To search for customers within a specified proximity to your location or another reference point:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. Tap the Filter button at the top of the left pane in the Contact Customer home screen.
3. To filter customer records by name or number, enter data in the Customer Name and Customer Number fields.
4. To turn on or turn off the Include Proximity in Search option, click the toggle button.

Note: If you turn off the Include Proximity in Search option in the filters screen, the system will not display the Map link or the distance to a customer in the detail list.

Figure 20–4 Include Proximity in Search

5. To refine your search, tap the Locate By drop-down button.

On the filters screen, the Locate By drop-down menu provides three options: My Location, Street Address, and Customer Number. The system displays the My Location option by default and populates default values in these fields: Proximity, Latitude, and Longitude.

Note: To display the Street address option in the Filters screen, you must set the Enable Location Services option to Yes in the Work With EnterpriseOne System Control (P99410) program.

My Location

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location. If you do not select this option, you must select either the Street Address or the Customer Number as the reference point. You can manually enter the latitude and longitude if desired.

Street Address

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location based on the customer's address.

Note: The street address option is visible in the drop-down menu only when the Enable Location Services option is set to Yes in the Work With EnterpriseOne System Control (P99410) program.

Customer Number

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location based on the customer name or number.

Proximity

The system populates these fields with the values that you have set up in the user preferences for the application. If you have not specified the default values in the preferences, the system populates a default value of 10 Miles. The system filters the customer's location that is within the radius specified in the Proximity field.

Enter a numerical value for the radius within which the system locates the customer location. The center of the radius is the reference point; the reference point can be your location or a user-defined location.

Unit of Measure

Specify whether to use Miles or Kilometers for the radius (proximity) within which the system locates the customer location.

Latitude Longitude

The system populates these fields with the latitude and the longitude of your location. The system uses the values in these fields to get the reference point (center of the radius).

If you do not want to use your location as the reference point, tap the latitude and longitude fields and enter new values. The system uses the updated values to locate the new reference point and calculates the proximity using this new reference point.

6. In the filters screen, to continue the search using the specified filter values, tap the Apply button.

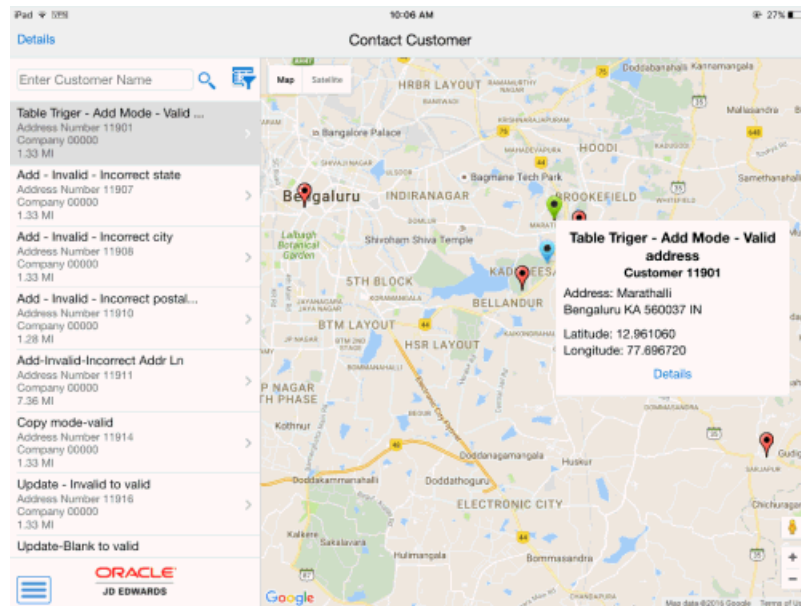
The system takes you to the list of customer records that is displayed based upon their proximity to the reference point.

To discontinue the use of filter values in your search, tap the Cancel button.

To delete all the filter values you specified, and to enter new filter values, tap the Clear button.

7. On the Details screen, to view customer locations on the map, click the Map link on the top-left corner of the screen.

On the Map screen, the system displays the list of customer records in the left pane based on the filter values and a map with marker for each customer location in the right pane.

Figure 20–5 Maps screen

8. To view the details of the customer, you must select a customer record. You can select the customer records either by tapping the customer record from the list on the left pane, or by tapping the red marker for the customer record on the map in the right pane.

When you select the customer record on the map, the red marker for the customer record turns to green.

The system displays a blue maker for your location or the reference point, and a red marker for each customer within the specified filter range.

9. To view the details of the customer record, tap the green marker. The system opens a pop-up window that displays the basic information of the customer (such as the customer name and number, customer location address, and latitude and longitude).
10. To access the customer details screen, tap the Details link.
11. To log out of the application, tap the Menu button at the bottom-left of the screen, and then tap Logout.

20.4 Using the Contact Customer Mobile Smartphone Application

Use the Contact Customer smartphone application (M03015) to:

- View customer address information.
- View customer contacts.
- Add customer contact information to your device.
- Use mapping and navigation features of your device to locate the customer site.
- Send emails to customer contacts.
- Call customer contacts from your device.
- View the customer website by tapping the url.
- Search for customers within a user defined proximity (Release 9.1 Update).

Before you can use the application, you must download and install the application from the application store on your device.

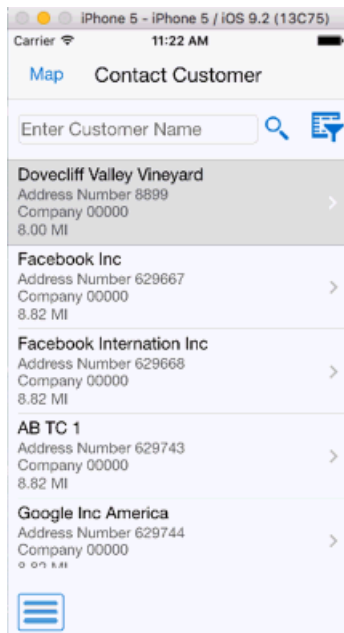
To open the application, tap the icon and log in.

20.4.1 Using the Contact Customer Mobile Smartphone Application

To view customer contact information:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Contact Customer Home screen, enter the customer name and tap Search.

Figure 20–6 Contact Customer Home Screen



3. Select a customer record to view customer information.
On this screen you can:
 - Tap the customer address to use the map and navigation capabilities of your mobile device.
 - Tap the phone number to call the customer from your device.
 - Tap the email address to compose an email to the customer.
 - Tap the customer url to open a browser application to view the web site on your device.
4. To view contact information for the selected customer, tap the Contacts button. The device displays a list of contacts associated with the customer.
5. To view detailed information about a specific contact, tap the contact record.
You can tap the address to use the map and navigational features on your device.
6. Tap the Phone and Email tab to view additional information about the contact.
You can tap the phone number or email address to contact the customer using the features on your device.

7. Tap the Create Device Contact button to add the contact record to your device contacts. If the contact does not already exist, the system adds the contact to your device and displays a confirmation message, Contact Added. If the contact already exists, the system does not update anything, and returns a message, Contact Exists.

Note that this button appears only if the device privacy settings are enabled for the application to access the device contacts.

8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

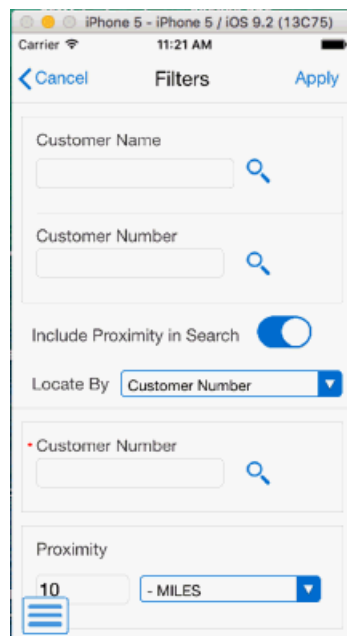
20.4.2 Searching for Customers within a User-Defined Proximity Using the Contact Customer Mobile Smartphone Application (Release 9.1 Update)

To search for customers within a specified proximity to your location or another reference point:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. Tap the Filter button in the Contact Customer home screen.
3. To filter customer records by name or number, enter data in the Customer Name an Customer Number fields.
4. To turn on or turn off the Include Proximity in Search option, click the toggle button.

Note: If you turn off the Include Proximity in Search option in the filters screen, the system will not display the Map link or the distance to a customer in the detail list.

Figure 20–7 Include Proximity in Search



5. To refine your search, tap the Locate By drop-down button.

On the filters screen, the Locate By drop-down menu provides three options: My Location, Street Address, and Customer Number. The system displays the My Location option by default and populates default values in these fields: Proximity, Latitude, and Longitude.

Note: To display the Street address option in the Filters screen, you must set the Enable Location Services option to Yes in the Work With EnterpriseOne System Control (P99410) program.

My Location

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location. If you do not select this option, you must select either the Street Address or the Customer Number as the reference point. You can manually enter the latitude and longitude if desired.

Street Address

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location based on the customer's address.

Note: The street address option is visible in the drop-down menu only when the Enable Location Services option is set to Yes in the Work With EnterpriseOne System Control (P99410) program.

Customer Number

Select this option from the Locate By drop-down menu to allow the mobile application to access the device's location based on the customer name or number.

Proximity

The system populates these fields with the values that you have set up in the user preferences for the application. If you have not specified the default values in the preferences, the system populates a default value of 10 Miles. The system filters the customer's location that is within the radius specified in the Proximity field.

Enter a numerical value for the radius within which the system locates the customer location. The center of the radius is the reference point; the reference point can be your location or a user-defined location.

Unit of Measure

Specify whether to use Miles or Kilometers for the radius (proximity) within which the system locates the customer location.

Latitude Longitude

The system populates these fields with the latitude and the longitude of your location. The system uses the values in these fields to get the reference point (center of the radius).

If you do not want to use your location as the reference point, tap the latitude and longitude fields and enter new values. The system uses the updated values to locate the new reference point and calculates the proximity using this new reference point.

6. In the filters screen, to continue the search using the specified filter values, tap the Apply button.

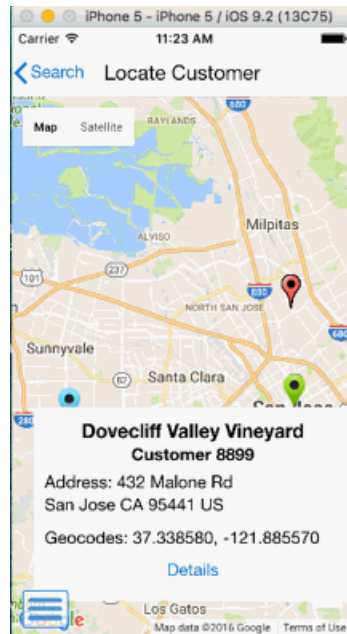
The system takes you to the list of customer records that is displayed based upon their proximity to the reference point.

To discontinue the use of filter values in your search, tap the Cancel button.

7. On the Details screen, to view customer locations on the map, select a customer record and click the Map link on the top-left corner of the screen.

On the Map screen, the system displays the customer record based on the filter values and a map with marker for the respective customer.

Figure 20–8 Maps screen



8. To view the details of the customer, tap the red marker for the customer record on the map.

When you select the customer record on the map, the red marker for the customer record turns to green.

The system displays a blue marker for your location or the reference point, and a red marker for each customer within the specified filter range.

9. To view the details of the customer record, tap the green marker. The system opens a pop-up window that displays the basic information of the customer (such as the customer name and number, customer location address, and latitude and longitude).
10. To view the details of a different customer record, return to the customers list, and tap the customer record from the list. You can also select different customer record by going back to the map, and selecting the customer record on the map.
To access the customer details screen, tap the Search link.
11. To log out of the application, tap the Menu button at the bottom-left of the screen, and then tap Logout.

Contact Supplier Mobile Application

This chapter discusses these topics:

- [Section 21.1, "Contact Supplier Mobile Applications Overview"](#)
- [Section 21.2, "Setting Up the Contact Supplier Mobile Application"](#)
- [Section 21.3, "Using the Contact Supplier Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- Entering Supplier Master Information in the *JD Edwards EnterpriseOne Accounts Payable Implementation Guide*.
 - Entering Address Book records in the *JD Edwards EnterpriseOne Address Book Implementation Guide*.
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21.1 Contact Supplier Mobile Applications Overview

You use the Contact Supplier mobile application to view supplier contact information on your smartphone. The Contact Supplier smartphone application enables you to:

- View supplier address information.
- View supplier contacts.
- Add supplier contact information to your device.
- Locate the supplier site by using the mapping and navigation features of your device.
- Send emails to supplier contacts.
- Call supplier contacts from your device.
- View the supplier website on your device.

Note: The Contact Supplier mobile application is inquiry-only. You cannot use the application to update supplier information in the EnterpriseOne database.

This table lists the applications that you can use to view supplier contact information:

Type of Application	Additional Information
Base EnterpriseOne application	Use the following applications in the JD Edwards EnterpriseOne system to view supplier contact information: <ul style="list-style-type: none"> ■ Work With Supplier Master (P04012) ■ Address Book Revisions (P01012) ■ Revise Who's Who (P0111) ■ Revise Phone Numbers (P0115) ■ Contact Information (P01111)
Smartphone application	Contact Supplier (M010010) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Contact Supplier

Before using the Contact Supplier smartphone application, you must perform the following setup tasks:

- Set the processing options for the application.
Complete this task in the EnterpriseOne system.
- Set field display preferences.
Complete this task using smartphone.

21.1.1 Differences and Limitations: Contact Supplier

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Supplier Data Displayed

You can use the Contact Supplier mobile application to view a subset of supplier information. Not all supplier information available in the base software is available in the mobile application.

Adding Contacts to Device

You can add an EnterpriseOne contact to your mobile device using the Contact Supplier mobile application. When you tap the Create Device Contact button, the system checks your device contacts for an exact match of the contact name to determine if the contact already exists on your device. The system does not check for duplicate phone numbers or email addresses. If the contact already exists on your device, but the name is not exactly the same as the contact name in the mobile application, the system creates a duplicate contact record on your device.

However, if the system finds an exact match for a contact name on the phone, the mobile application does not update the existing contact.

To enable the Create Device Contact button in the mobile application, you must allow the application to access contact information on your device. You can change permissions using the privacy settings on your device. If this setting is not turned on, the Create Device Contact button does not appear in the application.

21.2 Setting Up the Contact Supplier Mobile Application

Before you use the Contact Supplier mobile application, verify that the processing options for the application are set correctly. The processing options for the smartphone application specify the versions of the base EnterpriseOne applications that the smartphone application uses.

Users of the mobile applications can also set up user preferences within the mobile applications. With these preferences set, users can show or hide the following fields in the mobile applications:

- Function Code
- Type Code
- Contact Type

You can also enable the Create Device Contact feature, which adds an EnterpriseOne contact to your device contacts.

To add an EnterpriseOne contact to your device using the Create Device Contact feature, you must allow the application to access contact information on your device. You can change permissions using the privacy settings on your device.

21.2.1 Setting Processing Options for the Mobile Contact Supplier - Phone Application (M010010)

You use processing options to specify default processing information for a program.

21.2.1.1 Versions

1. Supplier Master (P04012) Version

Use this processing option to specify the version of the Supplier Master program (P04012) that the mobile application uses to process supplier information. If you leave this option blank, the system uses version ZJDE0001.

2. Address Book (P01012) Version

Use this processing option to specify the version of the Address Book program (P01012) that the mobile application uses to process supplier address information. If you leave this option blank, the system uses version ZJDE0001.

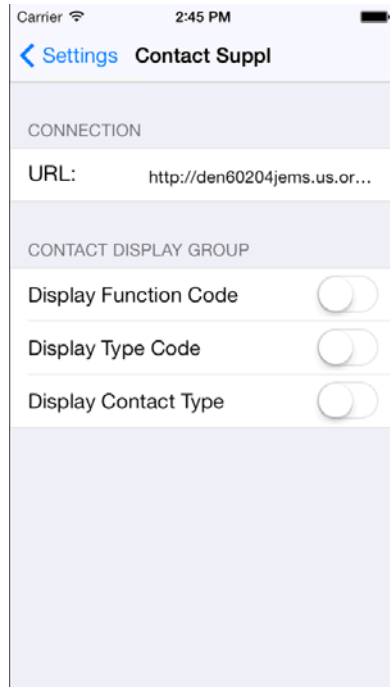
3. Contact Information (P01111) Version

Use this processing option to specify the version of the Contact Information program (P01111) that the mobile application uses to process supplier and contact email information. If you leave this option blank, the system uses version ZJDE0001.

21.2.2 Setting User Preferences for the Contact Supplier Mobile Application

To set user preferences, access the Settings on your mobile device, select the Contact Supplier application, and set each field to On (display) or Off (do not display).

Figure 21–1 Setting User Preferences



For instructions about accessing the settings on your mobile device, see the user documentation for your device.

Note: Entering connection information in the URL field is discussed in a separate task. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

21.3 Using the Contact Supplier Mobile Smartphone Application

You can use the Contact Supplier smartphone application (M010100) to:

- View supplier address information.
- View supplier contacts.
- Add supplier contact information to your device.
- Locate the supplier site by using the mapping and navigation features of your device.
- Send emails to supplier contacts.
- Call supplier contacts from your device.
- View the supplier website on your device.

Before you can use the application, you must download and install the application from the application store on your device.

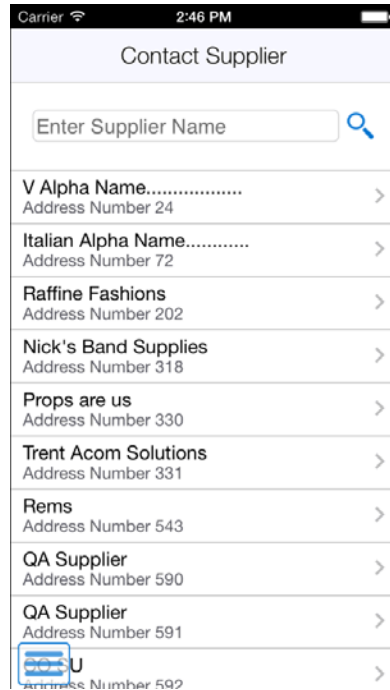
To open the application, tap the Contact Supp icon and log in.

21.3.1 Using the Contact Supplier Mobile Smartphone Application

To view supplier contact information:

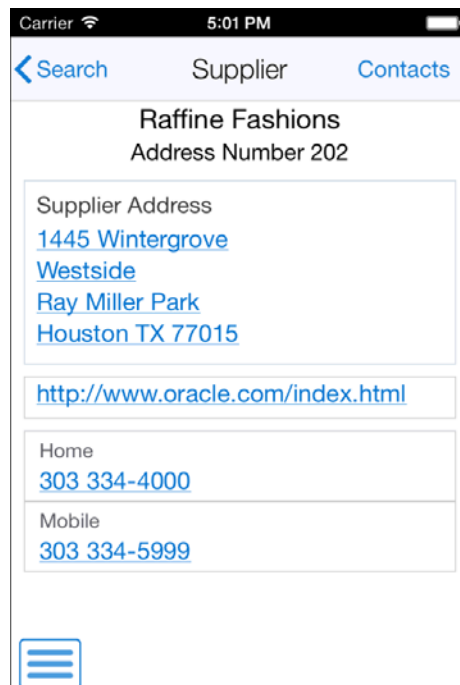
1. Open the application by tapping the Contact Supp icon on your device, and log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Contact Supplier home screen, enter the supplier name and tap Search.

Figure 21–2 Contact Supplier Home screen



3. Select a supplier record to view supplier information.

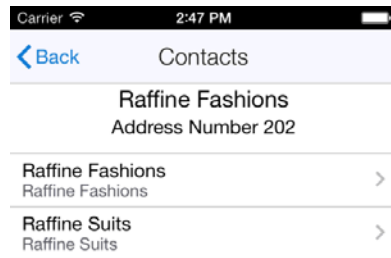
Figure 21–3 Supplier screen



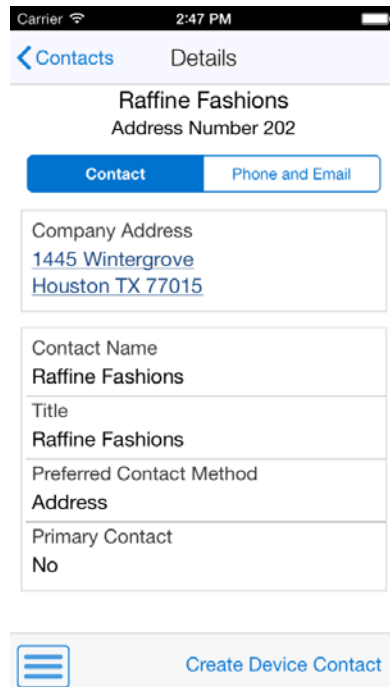
On this screen you can:

- Tap the supplier address to use the map and navigation capabilities of your mobile device.
 - Tap the phone number to call the supplier from your device.
 - Tap the supplier hyperlink to open a browser application to view the website on your device.
4. Tap the Contacts button to view contact information for the selected supplier. The device displays a list of contacts associated with the supplier.

Figure 21–4 *Contacts screen*



5. Tap the contact record to view detailed information about a specific contact.

Figure 21–5 Details screen - Contacts tab

You can tap the address to use the map and navigational features on your device.

6. Tap the Phone and Email tab to view additional information about the contact.

You can tap the phone number or email address to contact the supplier.

7. Tap the Create Device Contact button to add the contact record to your device contacts. If the contact does not already exist, the system adds the contact to your device and displays a confirmation message, Contact Added. If the contact already exists, the system does not update anything, and displays a message, Contact Exists.

Note: The system displays the Create Device Contact button only if you enable the device privacy settings for the application to access the device contacts.

8. To log out of the application, tap the Menu button at the bottom left of the screen, and tap Logout.

Customer Account Overview Mobile Applications

This chapter discusses these topics:

- [Section 22.1, "Customer Account Overview Mobile Applications Overview"](#)
- [Section 22.2, "Setting Up the Customer Account Overview Mobile Applications"](#)
- [Section 22.3, "Using the Customer Account Overview Mobile Tablet Application"](#)
- [Section 22.4, "Using the Customer Account Overview Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Setting Up Customer Master Information in the JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide](#)
 - [Understanding Working Customer Accounts for Collection in the JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide](#)
 - [Managing Credit and Collections in the JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide](#)
 - [Entering Address Book Records in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide](#)
-
-

22.1 Customer Account Overview Mobile Applications Overview

You use the Customer Account Overview mobile applications to review the financial status of a customer on your mobile devices. The financial information available for review includes the selected customer's:

- Credit information, including limits, credit messages, credit and collection managers, and available credit amounts.

- Invoice aging data, which shows whether the customer is current or past-due on their payments.
- Contact information, which includes names, phone numbers, email addresses, and addresses.

Additionally, you can use the Customer Account Overview mobile applications to:

- View customer address information.
- View customer contacts.
- Add customer contact information to your device.
- Use mapping and navigation features of your device to locate the customer site.
- Send emails to customer contacts.
- Call customer contacts (smartphone only).

This table lists the applications that are available to review customer account information:

Type of Application	Additional Information
Base EnterpriseOne Application	Use these applications in the JD Edwards EnterpriseOne system to review customer account information: <ul style="list-style-type: none"> ■ Customer Master (P03013) ■ Account Balance Inquiry (P03B218) ■ Address Book Revisions (P01012) ■ Revise Who's Who (P0111) ■ Revise Phone Numbers (P0115) ■ Contact Information (P01111)
Tablet Application	Mobile Customer Account Overview - Tablet (M03B230) To download the tablet application to your tablet device, search on the following application name in the application store: <ul style="list-style-type: none"> ■ JD Edwards Customer Account
Smartphone Application	Mobile Customer Account Overview - Phone (M03B231) To download the smartphone application to your device, search on the following application name in the application store: <ul style="list-style-type: none"> ■ JD Edwards Customer Account

Before using the Customer Account Overview tablet or smartphone application, you must perform the following setup and configuration tasks:

- Set the processing options for the mobile applications.
Complete this task in the EnterpriseOne system.
- Validate the customer search type.
Complete this task in the EnterpriseOne system.
- Set field display preferences.
Complete this task using the mobile devices.

- Run the Credit Analysis Refresh program (R03B525) to update customer account information.

Complete this task in the EnterpriseOne system.

- Set the privacy settings for contacts on your iOS device to determine whether you can add contacts from the application directly to the contacts on your device.

Complete this task using the iOS mobile devices.

This button is enabled by default in Android devices.

22.1.1 Differences and Limitations: Customer Account Overview

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Customer Data Displayed

While the Customer Account Overview mobile applications do not function differently than base EnterpriseOne applications, they do offer the mobile user a subset of customer information. Not all customer information available in the base software is available in the mobile applications.

Adding Contact to Device

When reviewing customer contacts in the mobile application, you can add the EnterpriseOne contact to your mobile device. When you tap the Create Device Contact button, the system looks in your device contacts for an exact match of the contact name to determine whether the contact exists on your device already. The system does not check for duplicate phone numbers or email addresses. Therefore, if the contact already exists on your device, but the name is not exactly the same as the contact name in the mobile application, it is possible to create a duplicate contact record on your device.

Additionally, if an exact match is found, and the contact already exists on the phone, the mobile application does not update the existing device contact with the phone numbers and email addresses from the mobile application contact record.

To enable the Create Device Contact button on your iOS mobile device, you must set the privacy settings for contacts to allow the application to access contact information. If the setting is not turned on, the Create Device Contact button does not appear in the application.

This button is enabled by default in Android devices.

22.2 Setting Up the Customer Account Overview Mobile Applications

The Customer Account Overview mobile applications search for customer information in the EnterpriseOne database. To ensure that your mobile applications are searching for and returning the correct data, you must verify that the Search Type processing option on the Defaults tab of the Customer Master program (P03013) is set with the correct search type. The mobile applications will return only those address book numbers that use the search type defined in this processing option.

See Setting Processing Options for Customer Master Information (P03013) in the JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide for detailed information about these options.

Additionally, you must run the Credit Analysis Refresh program (R03B525) to update customer account information. The data provided by this program is displayed on the Account tab of the mobile applications. See Running the Credit Analysis Refresh Program in the JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide

In addition to verifying the search type used to identify customers, you can also set up user preferences within the mobile applications. These preferences enable you to show or hide the following fields in the mobile application:

- Function Code
- Type Code
- Contact Type

You can also set the privacy settings on your iOS device to enable the Create Device Contact feature, which enables you to add an EnterpriseOne contact to your device contacts.

To access the privacy settings on an iOS device:

1. Select Settings, then select Privacy, then select Contacts.
2. Enable the option for all applications that you want to have access to your device contacts.

This button is enabled by default in Android devices.

Lastly, you must set the processing options for the mobile applications.

22.2.1 Setting Processing Options for the Mobile Customer Account Overview - Tablet Application (M03B230)

You use processing options to specify default processing information for a program.

22.2.1.1 Versions

1. P01012 Version

Use this processing option to specify the version of the Address Book Revisions program (P01012) that the mobile application uses to process customer and contact address information. If this option is left blank, the system uses version ZJDE0001.

2. P03013 Version

Use this processing option to specify the version of the Customer Master program (P03013) that the mobile application uses to process customer information. If this option is left blank, the system uses version ZJDE0001.

3. P01111 Version

Use this processing option to specify the version of the Contact Information program (P01111) that the mobile application uses to process customer and contact email information. If this option is left blank, the system uses version ZJDE0001.

22.2.2 Setting Processing Options for the Mobile Customer Account Overview - Phone Application (M03B231)

You use processing options to specify default processing information for a program.

22.2.2.1 Versions

1. P01012 Version

Use this processing option to specify the version of the Address Book Revisions program (P01012) that the mobile application uses to process customer and contact address information. If this option is left blank, the system uses version ZJDE0001.

2. P03013 Version

Use this processing option to specify the version of the Customer Master program (P03013) that the mobile application uses to process customer information. If this option is left blank, the system uses version ZJDE0001.

3. P01111 Version

Use this processing option to specify the version of the Contact Information program (P01111) that the mobile application uses to process customer and contact email information. If this option is left blank, the system uses version ZJDE0001.

22.2.3 Setting Up User Preferences for Customer Account Overview Mobile Applications

To set user preferences, access the Settings on your mobile device, select the application you want to configure, and set each field to On (display) or Off (do not display).

Figure 22–1 Cust Account User Preferences

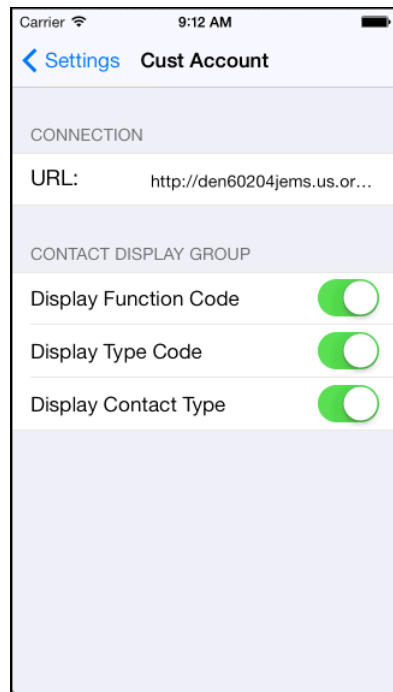
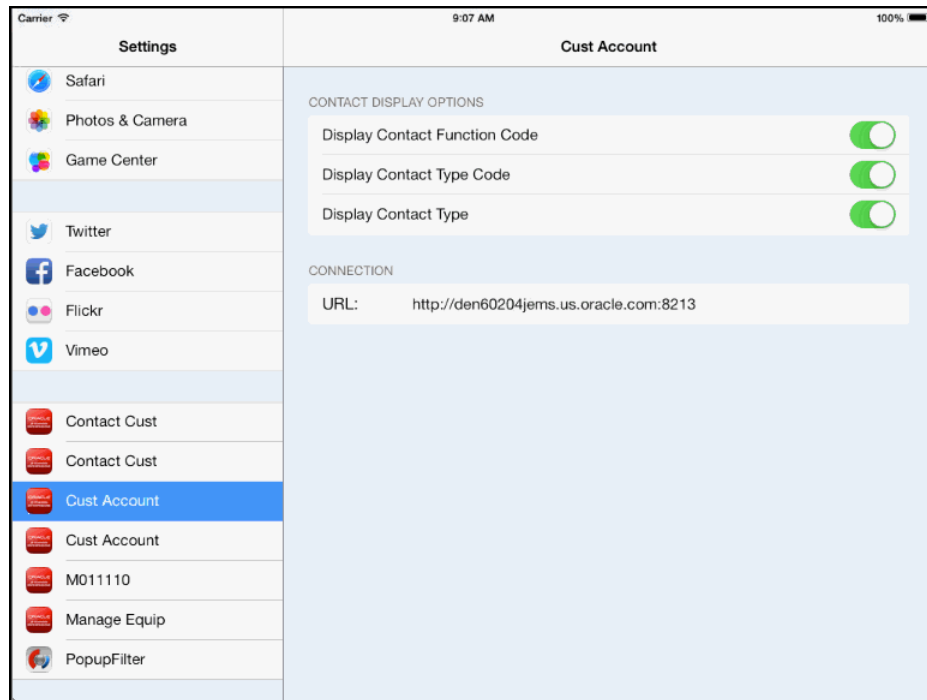


Figure 22–2 Cust Account User Preferences

For instructions about accessing the settings on your mobile device, see the user documentation for your device.

Note: Entering connection information in the URL field is discussed in a separate task. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

22.3 Using the Customer Account Overview Mobile Tablet Application

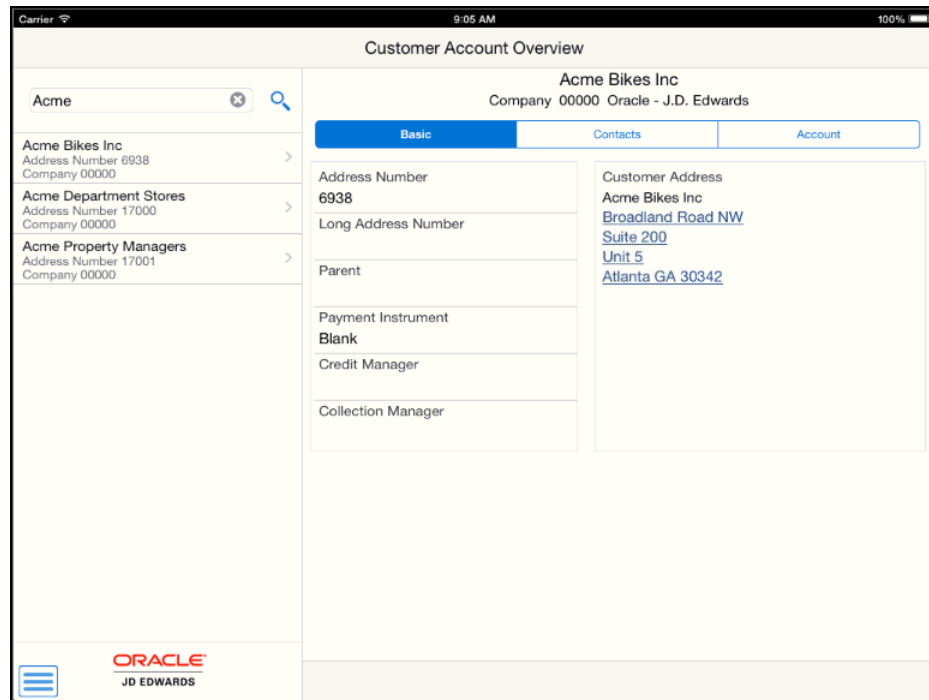
The Customer Account Overview tablet application (M03B230) enables users to access customer contact, address, and financial information from a mobile tablet device.

Before you can use the application, you must download and install the application from the application store on your device.

22.3.1 Reviewing Customer Account Data on a Mobile Tablet

To review customer account data on a mobile tablet:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. Enter the name of a customer and then tap the Search button.

Figure 22–3 Customer Financial Facts Home Screen

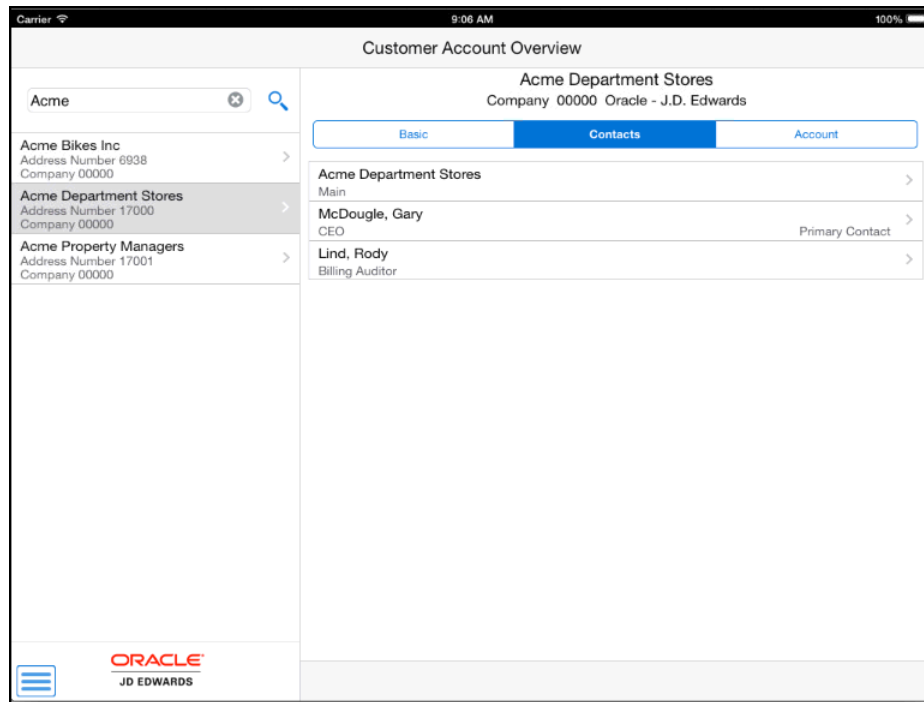
Note that the details associated with the first record in the list of search results is displayed in the right side of the screen.

3. To view detailed information about a customer, tap one of the search results.

You can view basic information about the customer, such as their address number, credit and collection managers, whether they belong to a parent company, and their payment instrument. Additionally, you can tap the address to launch the map and navigation features of your device.

4. To view contact information, tap the Contacts tab.

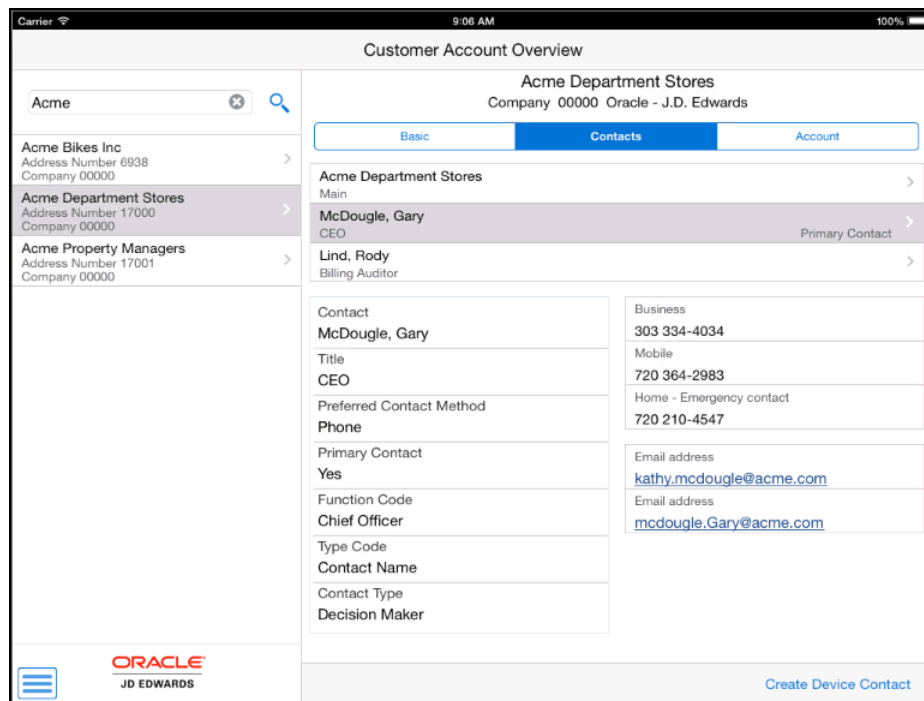
Figure 22–4 Customer Financial Facts, Contacts Tab



The application displays a list of contacts.

- To view detailed information about a contact, tap on the contact name.

Figure 22–5 Customer Financial Facts, Contact Details



You can review detailed information about the contact. To email the contact, tap the email address to launch your device's email application.

- Tap the Create Device Contact button to add the contact record to your device contacts. If the contact does not already exist, the system adds the contact to your device and displays a confirmation message, Contact Added. If the contact already exists, the system does not update anything, and returns a message, Contact Exists.

Note that this button appears only if the privacy settings on the device have been set to enable the application to access the contact information on the device.

- To view customer financial information, tap the Account tab.

Figure 22–6 Customer Financial Facts, Account Tab

The screenshot shows the 'Customer Account Overview' screen for 'Acme Department Stores'. The screen is divided into three main sections: a left sidebar with a list of customer entities, a central table of financial facts, and a right sidebar with an aging totals table. The central table has three tabs: 'Basic', 'Contacts', and 'Account' (which is selected). The financial facts table includes rows for 'Account Opened', 'Last Invoice Date', 'Last Applied Amount', 'Date Last Paid', 'Open Invoices', 'Past Due Invoices', 'Unapplied Receipts', 'Credit Limit', 'Over Credit Limit', 'Credit Message', and 'Last Credit Review'. The aging totals table shows various aging buckets from 'Future' to 'Over 999'.

Acme Department Stores Company 00000 Oracle - J.D. Edwards		Aging Totals	
Account Opened	2/26/99	Future	0.00
Last Invoice Date		Current	0.00
Last Applied Amount	0.00	61 - 90	0.00
Date Last Paid		91 - 120	3,430.00
Open Invoices	26,650.00	121 - 180	7,000.00
Past Due Invoices	93,190.00	181 - 240	17,000.00
Unapplied Receipts	66,540.00-	241 - 999	65,760.00
Credit Limit	50,000.00	Over 999	0.00
Over Credit Limit	0.00		
Credit Message	On Credit Hold per Accounting		
Last Credit Review	8/29/13		

You can review financial information, such as the amount of open invoices, credit limits, credit messages, and aging totals.

22.4 Using the Customer Account Overview Mobile Smartphone Application

The Customer Account Overview smartphone application (M03B231) enables users to access customer contact, address, and financial information from a mobile smartphone.

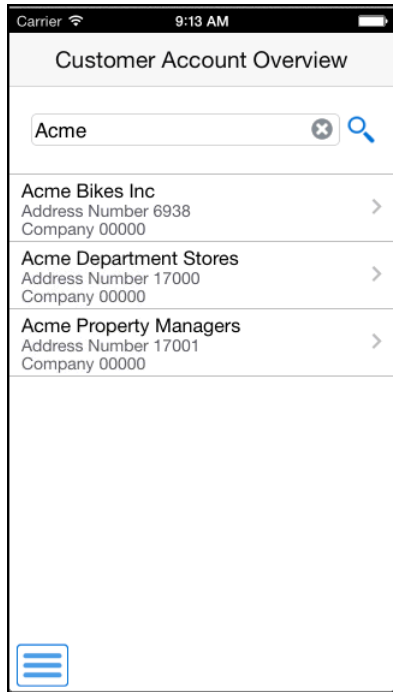
Before you can use the application, you must download and install the application from the application store on your device.

22.4.1 Reviewing Customer Account Data on a Smartphone

To review customer Account data on a smartphone:

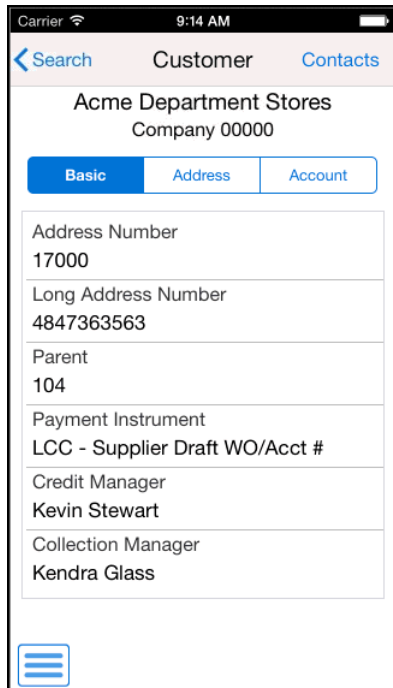
- Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
- Enter the name of a customer and then tap the Search button.

Figure 22–7 Customer Financial Facts Screen



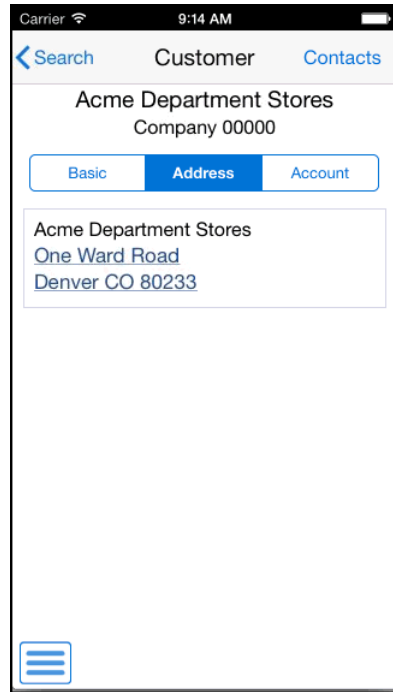
3. To view detailed information about a customer, tap one of the search results.

Figure 22–8 Customer Screen, Basic Tab



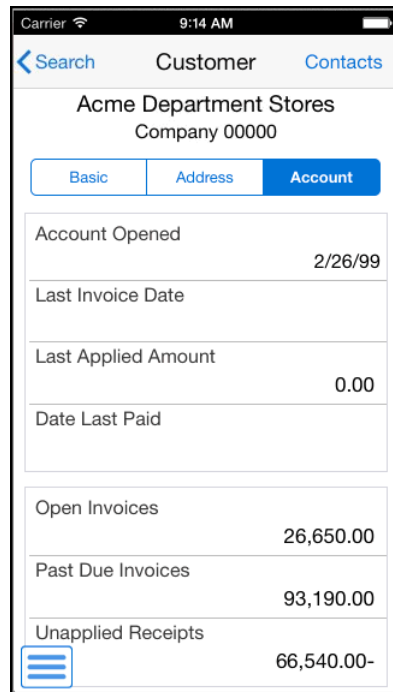
You can view basic information about the customer, such as their address number, credit and collection managers, whether they belong to a parent company, and their payment instrument.

4. To view address information, tap the Address tab.

Figure 22–9 Customer Screen, Address Tab

Tap the address to use the map and navigation features of your mobile device. The map and navigation features used to complete this action depend on the device settings.

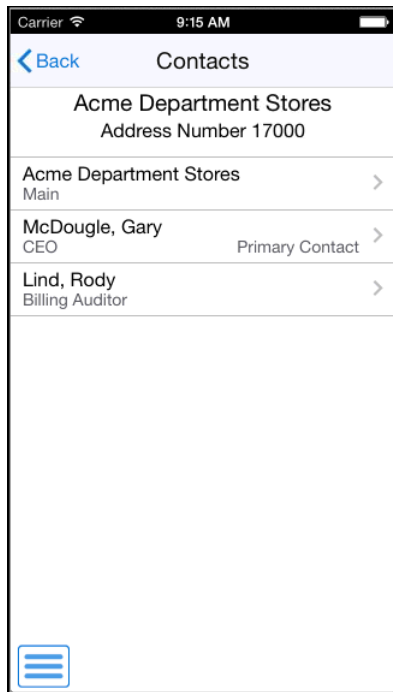
5. To view customer financial information, tap the Account tab.

Figure 22–10 Customer Screen, Account Tab

Scroll down to review additional financial information.

6. To view a list of contacts for the customer, tap the Contacts button at the top of the screen.

Figure 22–11 *Contacts Screen*



7. To view details about a contact, tap the contact name.
Tap the address to use the map and navigation features of your device.
8. Tap the Create Device Contact button to add the contact record to your device contacts. If the contact does not already exist, the system adds the contact to your device and displays a confirmation message, *Contact Added*. If the contact already exists, the system does not update anything, and returns a message, *Contact Exists*.

Note that this button appears only if the privacy settings on the device are set to enable the application to access the device contact information.
9. Tap the Phone and Email tab to review phone and email information for the selected contact.

To call the contact from your device, tap the phone number.
To email the contact from your device, tap the email address.

Expense Approval Mobile Applications

This chapter discusses these topics:

- [Section 23.1, "Expense Approval Mobile Applications Overview"](#)
- [Section 23.2, "Setting Up the Expense Approval Mobile Applications"](#)
- [Section 23.3, "Using the Expense Approval Mobile Applications"](#)

Important Note: Before using these mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the expense report approval processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- *Approving Expense Reports in the JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*
-
-

23.1 Expense Approval Mobile Applications Overview

You use the Expense Approval mobile applications to:

- Review all expense reports that are currently awaiting your approval.
- View photographs of receipts or other expense-related documents that are associated with a report.

You can review report-level photos and individual expense-level photos.

- View notes that are associated with a report.

You can review report-level notes and individual expense-level notes.

- You can review split receipt details.
- You can review summary receipt details.
- Easily view items on the report that have exceptions.

The mobile applications display warning messages on reports and line-level expenses that contain exceptions to the expense policies of your organization.

- Approve or reject an expense report that is awaiting your approval.

Note: Using the tablet application, you can approve multiple reports at once. Using the smartphone application, you approve expense reports one at a time.

- Enter comments and additional information when rejecting a report.

After you approve or reject an expense report on your mobile device, the system uses the same workflow notification process that is set up in the base EnterpriseOne Expense Management system.

This table lists the applications that are available to review, approve, and reject expense reports:

Type of Application	Additional Information
Base EnterpriseOne Application	Use these applications in the JD Edwards EnterpriseOne system to review, approve, and reject expense reports: <ul style="list-style-type: none"> ■ Expense Report Review/Entry (P09E2011) ■ Expense Report Approval (P09E113) ■ Expense Report Messages (P09E120)
Tablet Application	Mobile Expense Approval - Tablet (M09E001) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Approve Expense
Smartphone Application	Mobile Expense Approval - Phone (M09E010) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Approve Expense

Before using the Expense Approval tablet or smartphone applications, you must set the processing options for each program.

23.1.1 Differences and Limitations: Expense Approval Mobile Applications

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

When you enter the Expense Approval mobile applications, the system automatically searches for and loads the reports that are awaiting your approval. You can view only those reports that are currently awaiting your approval. You cannot search for reports that have previously been approved or rejected, or for reports that are awaiting the approval of another user.

23.2 Setting Up the Expense Approval Mobile Applications

Before these mobile applications are deployed to your organization, you must set the processing options for each program. These options are used to specify which version of the expense applications in the EnterpriseOne base system to use when processing data on the mobile device.

23.2.1 Setting Processing Options for the Mobile Expense Approval - Tablet Application (M09E001)

You use processing options to specify default processing information for a program.

23.2.1.1 Versions

1. Expense Report Review/Entry Version

Use this processing option to specify the version of the Expense Report Review/Entry program (P09E2011) that the mobile application uses to retrieve and process expense information. If you leave this option blank, the system uses version ZJDE0001.

23.2.2 Setting Processing Options for the Mobile Expense Approval - Phone Application (M09E010)

You use processing options to specify default processing information for a program.

23.2.2.1 Versions

1. Expense Report Review/Entry Version

Use this processing option to specify the version of the Expense Report Review/Entry program (P09E2011) that the mobile application uses to retrieve and process expense information. If you leave this option blank, the system uses version ZJDE0001.

23.3 Using the Expense Approval Mobile Applications

The Expense Approval mobile applications enable you to review details about the expense reports that are awaiting your approval, and then approve or reject those reports. When you reject the report, you can include detailed information about why you are rejecting the report.

Before you can use the applications, you must download and install them from the application store on your device.

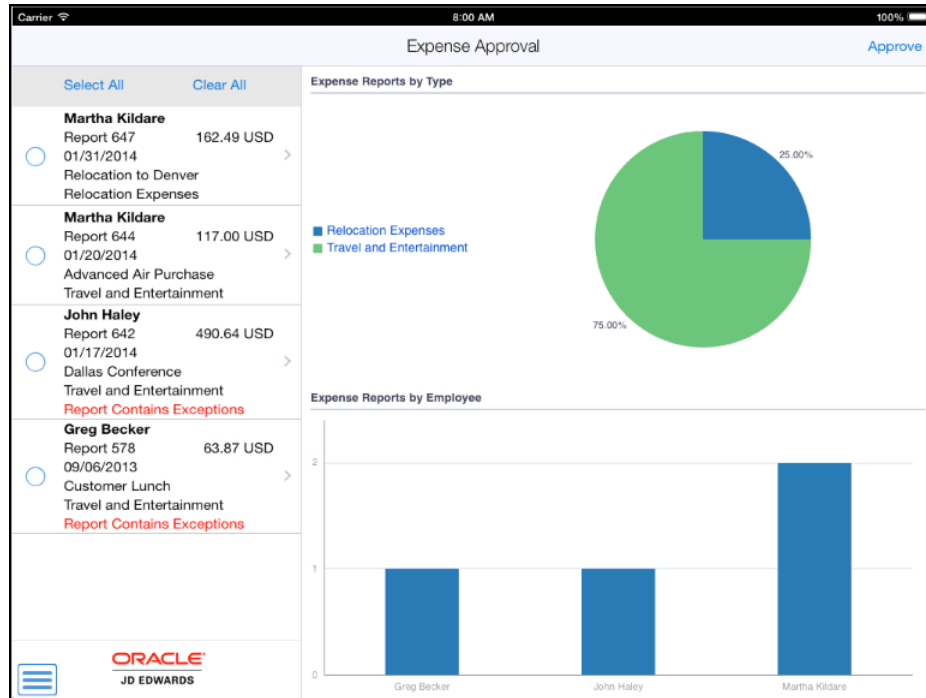
To open the application, tap the icon and log in.

23.3.1 Approving and Rejecting Expense Reports Using the Mobile Expense Approval Tablet Application

To approve or reject an expense report using a tablet:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. When you enter the application, a list of reports that are awaiting your approval appear on the left side of the screen.

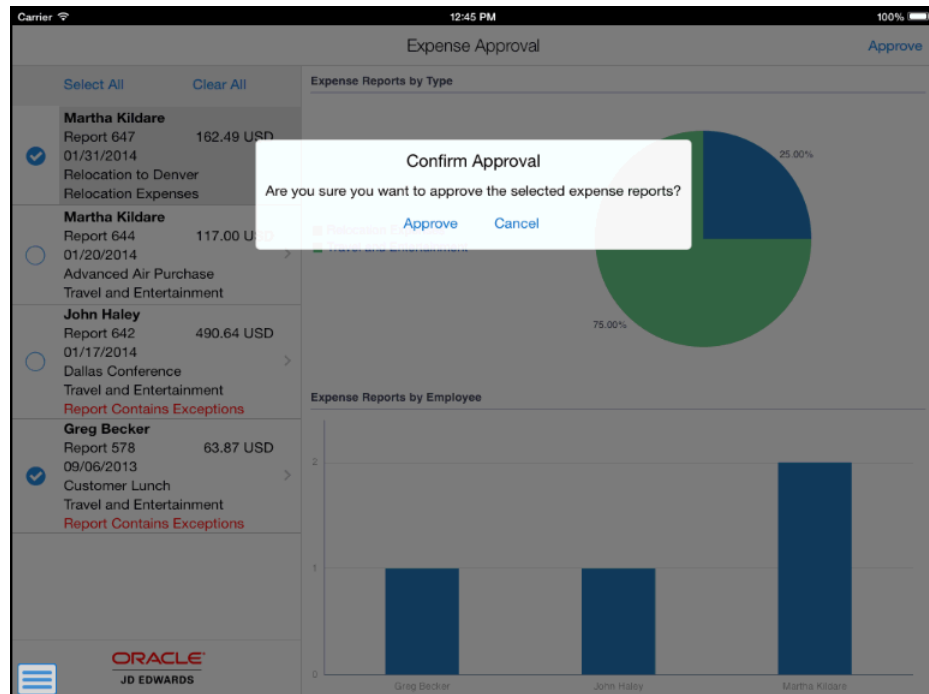
Figure 23–1 Expense Approval Home



The home screen also includes a pie chart that illustrates the types of reports awaiting approval, and a bar graph illustrating the employees with reports awaiting approval.

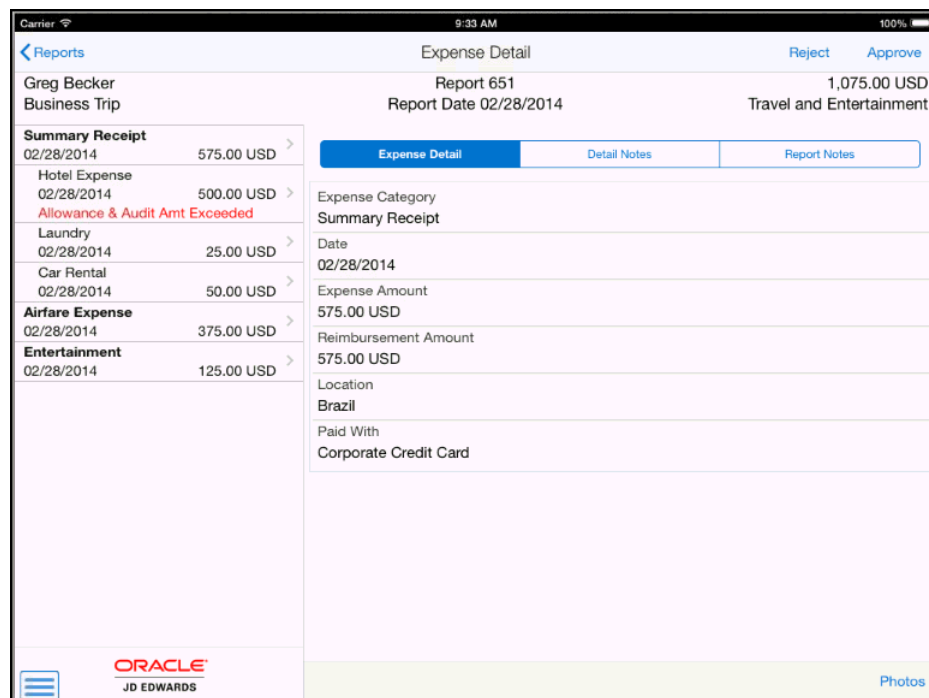
Additionally, you can easily determine whether any of the reports include exception items, as the report list displays exception messages in red text.

- To approve multiple reports at once, you can select individual reports by tapping the Select option to the left of the report, or tap the Select All button to select all of the reports in the list. You can also use the Clear All button to deselect any reports you have selected. Once you have selected the reports to approve, tap the Approve button at the top right of the screen. In the following example, two reports have been selected for approval.

Figure 23–2 Confirm Approval

Tap the Approve button to approve the selected reports, or tap Cancel to return to the list of reports.

4. To review the details of a report, tap the report in the report list.
5. When you enter the Expense Detail screen, the system automatically displays the detailed information associated with the first item in the report.

Figure 23–3 Expense Detail

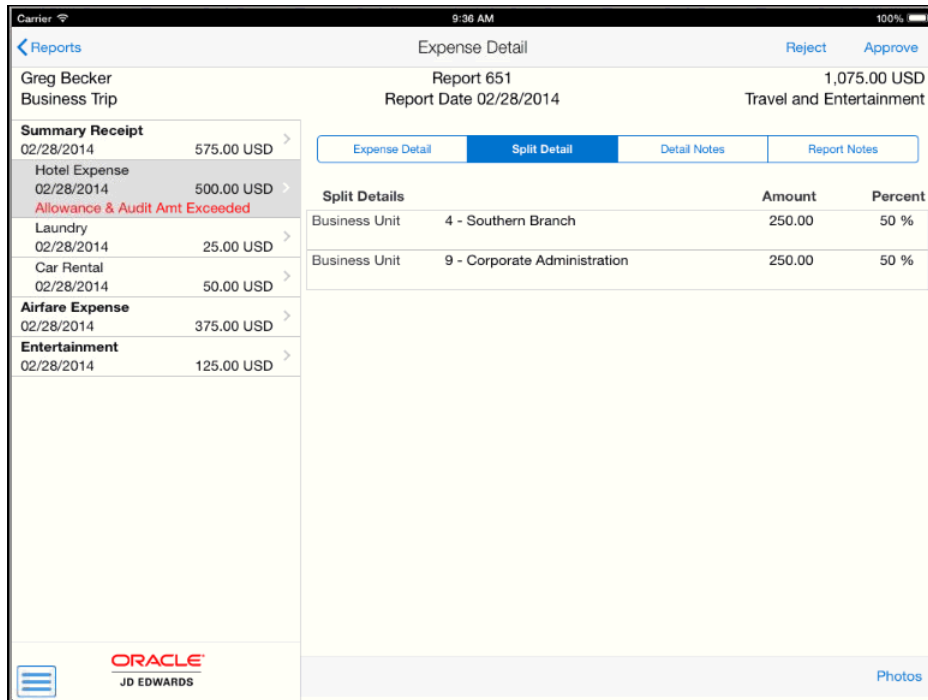
To view details for a different expense item, tap that item.

Note that all expenses included within a Summary Receipt are indented and appear under the Summary Receipt item.

To view line-level notes, tap the Detail Notes tab. To view report-level notes, tap the Report Notes tab. All notes are read-only.

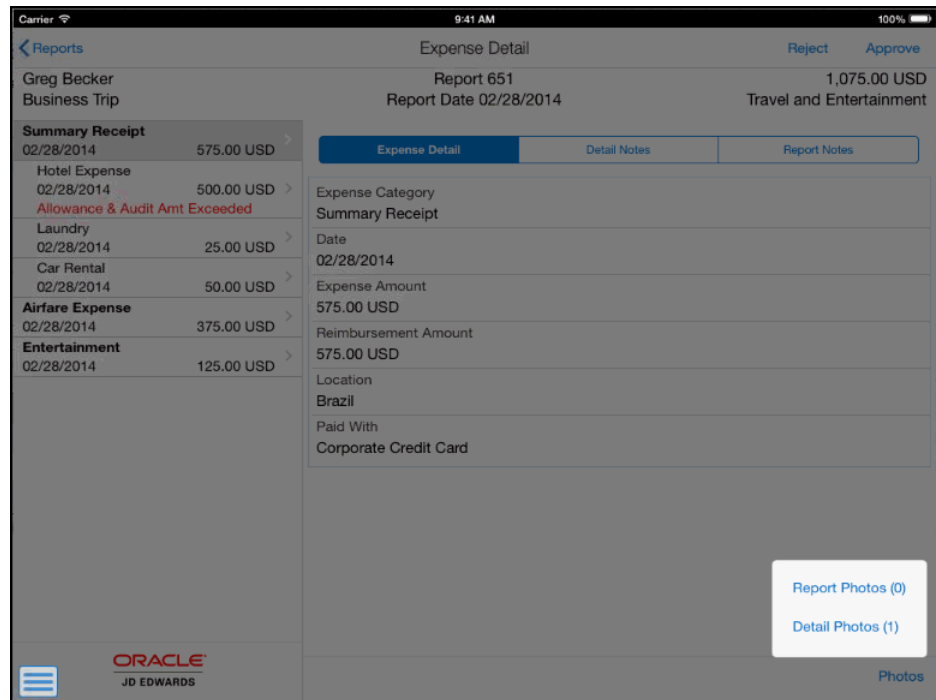
6. If the expense item is a split expense, the system displays the Split Details tab.

Figure 23–4 Split Detail



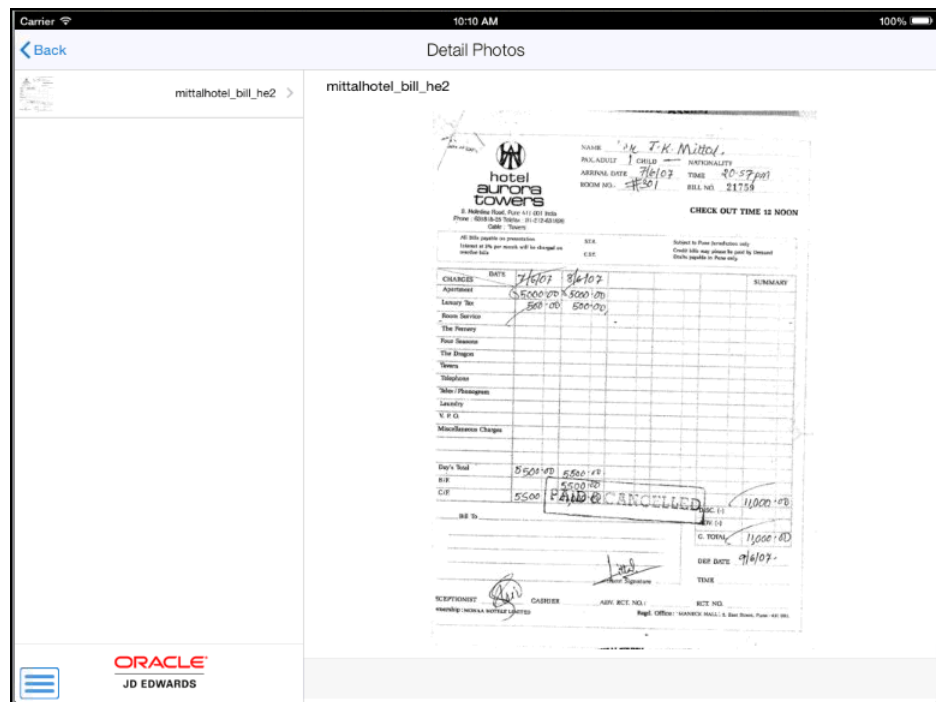
7. To approve the report, tap the Approve button at the top right of the screen, then tap Approve on the Confirm Approval screen. Tap Cancel to return to the report.
8. Tap the Photos button at the bottom right of the screen to view photos for the report or expense item. Tap either Report Photos (#) or Detail Photos (#) to view the photos for the report.

Figure 23–5 Photo Options



- On the Detail Photos screen, tap the photo you want to view. The system automatically displays the first picture in the list.

Figure 23–6 Detail Photos

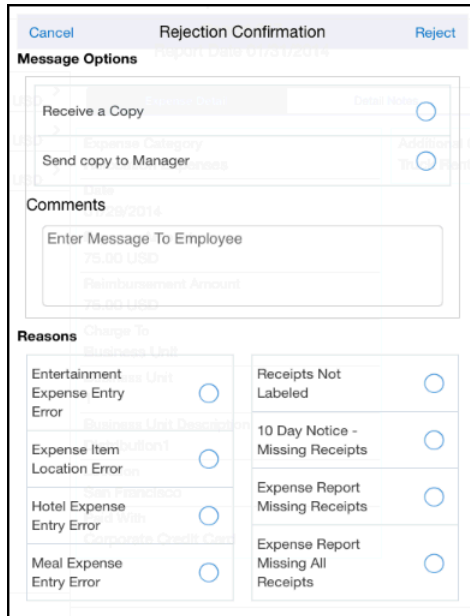


Tap Back to return to the expense report.

- To reject the report, tap the Reject button in the top right of the screen. On the Rejection Confirmation screen, specify message options, enter optional comments,

select the options that describe why you rejected the report, and then tap Reject. Tap Cancel to return to the report.

Figure 23–7 Rejection Confirmation



11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

23.3.2 Approving and Rejecting Expense Reports Using the Mobile Expense Approval Smartphone Application

To approve or reject an expense report using a smartphone:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. When you enter the application, a list of reports that are awaiting your approval appear on the Expense Approval screen.

Figure 23–8 Expense Approval

Expense Approval	
Martha Kildare	
Report 647	162.49 USD
01/31/2014	>
Relocation to Denver	
Relocation Expenses	
Martha Kildare	
Report 644	117.00 USD
01/20/2014	>
Advanced Air Purchase	
Travel and Entertainment	
John Haley	
Report 642	490.64 USD
01/17/2014	>
Dallas Conference	
Travel and Entertainment	
Report Contains Exceptions	
Greg Becker	
Report 578	63.87 USD
09/06/2013	>
Customer Lunch	
Travel and Entertainment	
Report Contains Exceptions	

You can easily determine whether any of the reports include exception items, as the report list displays exception messages in red text.

3. To review the details of a report, tap the report in the report list.
4. When you enter the Report screen, the system lists each expense item included in the report. Note that all expenses included within a Summary Receipt are indented and appear under the Summary Receipt item.

Figure 23–9 Report



- To view report-level notes or photos, tap the Action Menu at the top right of the screen, and then tap either the Report Notes or the Photos (#) button. All notes and photos are read-only. You cannot add photos to, or delete photos from the report.

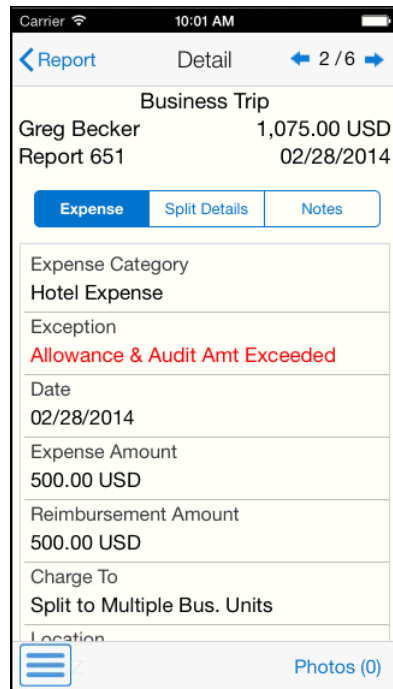
Figure 23–10 Action Menu Options



After viewing the notes or photos, tap the Back button to return to the expense report.

- To review the detailed information of an expense item, tap the expense. On the Detail screen, review the details of the expense item.

Figure 23–11 Detail

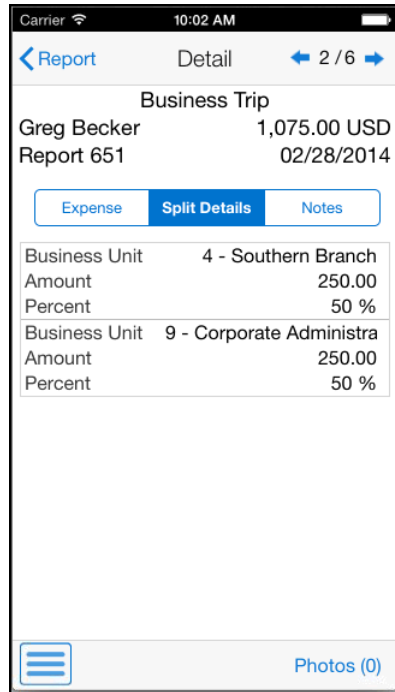


To view notes associated with the item, tap the Notes tab. All notes are read-only.

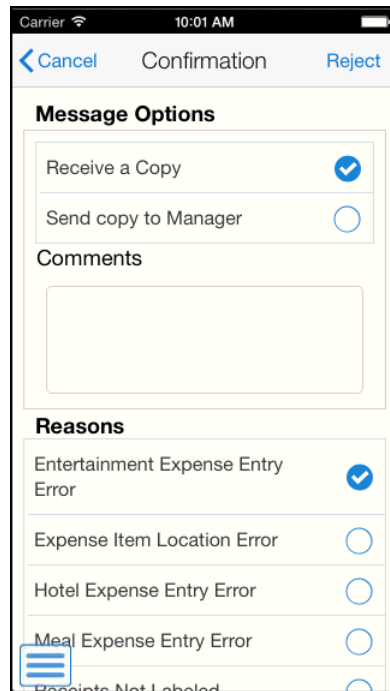
To view photos associated with the item, tap the Photos (#) button. Photos are read-only. You cannot add photos to, or delete photos from the item.

Additionally, you can tap the arrows at the top right of the screen to scroll through the expense items associated with the report.

- If the expense item is a split expense, the system displays the Split Detail tab.

Figure 23–12 Split Detail

8. Tap the Report button to return to the Report screen, where you can approve or reject the report.
9. To approve the report, tap the Approve button at the top of the screen, then tap Approve on the Confirm Approval screen. Tap Cancel to return to the report.
10. To reject the report, tap the Reject button at the bottom of the screen. On the Rejection Confirmation, specify message options, enter optional comments, select the options that describe why you rejected the report, and then tap Reject. Tap Cancel to return to the report.

Figure 23–13 Rejection Confirmation

11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Expense Entry Mobile Applications

This chapter discusses these topics:

- [Expense Entry Mobile Applications Overview](#)
- [Setting Up the Expense Entry Mobile Applications](#)
- [Using the Expense Entry Mobile Tablet Application](#)
- [Using the Expense Entry Mobile Smartphone Application](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

The features and functionality available in the Mobile Expense Entry applications are based on the base EnterpriseOne setup of the Expense Management system. Before using these mobile applications, you must be familiar with your organization's expense policies.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Entering Expense Reports in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*](#)

24.1 Expense Entry Mobile Applications Overview

You use the Expense Entry mobile enterprise tablet and smartphone applications to enable employees in your organization to enter, review, edit, and submit expense reports on a mobile device when they are away from the office. Managers can also use these applications to review their employees' expense reports.

Note: Managers cannot approve expense reports using these applications. To approve expense reports, managers must use the Mobile Expense Approval applications.

See [Chapter 23, "Expense Approval Mobile Applications"](#)

The Expense Entry mobile applications give users the ability to:

- Enter new expense reports.

When entering new expense reports, you can:

- Enter summary receipt expenses.
- Enter split receipts by job cost, business unit, or work order.
- Add corporate credit card transactions to the report.
- Attach notes and photos of receipts or other documents to a report.
- Enter reports that include multiple currencies.
- Review and edit their own expense reports that are currently at an editable status.
- Search for and review their own old expense reports.
- Review the expense reports of their direct report employees.

This table lists the applications that are available to enter expense reports:

Type of Application	Additional Information
Base EnterpriseOne Application	Use the Expense Entry application (P09E2011) in the JD Edwards EnterpriseOne system to enter expense reports.
Tablet Application	Mobile Expense Entry - Tablet (M09E020) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Enter Expense
Smartphone Application	Mobile Expense Entry - Phone (M09E021) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Enter Expense

Before using the Expense Entry tablet or smartphone application, you must set the processing options for each application.

24.1.1 Differences and Limitations: Expense Entry Mobile Applications

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2, "Languages in Mobile Applications"](#)

Additional Fields Tab

When entering an expense report, the Expense Entry mobile applications use the Additional tab to display the additional user-defined fields an organization sets up for expense entry and tracking. User-defined fields can be set up as optional or required, based on the organization's preferences. If any of those fields are required, you cannot save your expense report until you enter valid data in those fields.

The fields that appear on this tab are driven by the selected expense category type. If you change the category type, the fields that display on this tab change. If there are no additional user-defined fields, a message indicating that no additional fields have been set up is displayed on the Additional tab.

24.2 Setting Up the Expense Entry Mobile Applications

This section discusses setting up the Expense Entry mobile applications.

24.2.1 Setting Processing Options for the Mobile Expense Entry - Tablet Program (M09E020)

You use processing options to specify default processing information for a program.

24.2.1.1 Versions

Use the processing options on the Versions tab to specify which program version the mobile application uses when processing expense data.

1. Expense Report Review/Entry (P09E2011) Version

Use this processing option to specify which version of the P09E2011 program the mobile tablet application uses when processing expense data. Before specifying a version, Oracle recommends that you review the processing options for that version to verify that the options are correct, and that they satisfy the needs of your mobile users. If you leave this option blank, the system uses version ZJDE0001.

2. Credit Card Expenses (P09E150) Version

Use this processing option to specify which version of the P09E150 program the mobile tablet application uses when processing credit card data in an expense report. Before specifying a version, Oracle recommends that you review the processing options for that version to verify that the options are correct, and that they satisfy the needs of your mobile users. If you leave this option blank, the system uses version ZJDE0001.

3. Business Units (P0006) Version

Use this processing option to specify which version of the P0006 program the mobile tablet application uses when processing expense data. Before specifying a version, Oracle recommends that you review the processing options for that version to verify that the options are correct, and that they satisfy the needs of your mobile users. If you leave this option blank, the system uses version ZJDE0001.

24.2.2 Setting Processing Options for the Mobile Expense Entry - Phone Program (M09E021)

You use processing options to specify default processing information for a program.

24.2.2.1 Versions

Use the processing options on the Versions tab to specify which program version the mobile application uses when processing expense data.

1. Expense Report Review/Entry (P09E2011) Version

Use this processing option to specify which version of the P09E2011 program the mobile smartphone application uses when processing expense data. Before specifying a version, Oracle recommends that you review the processing options for that version to verify that the options are correct, and that they satisfy the needs of your mobile users. If you leave this option blank, the system uses version ZJDE0001.

2. Business Units (P0006) Version

Use this processing option to specify which version of the P0006 program the mobile smartphone application uses when processing expense data. Before specifying a version, Oracle recommends that you review the processing options for that version to

verify that the options are correct, and that they satisfy the needs of your mobile users. If you leave this option blank, the system uses version ZJDE0001.

24.3 Using the Expense Entry Mobile Tablet Application

The Expense Entry mobile tablet application enables you to:

- Enter expense reports.
- Enter summary receipt items on an expense report.
- Attach credit card transactions to an expense report.
- Enter split expenses on an expense report.
- Review, edit, and submit your expense reports.
- Review your employees' expense reports.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Enter Expense icon and log in.

24.3.1 Entering an Expense Report Using the Mobile Expense Entry Tablet Application

When creating an expense report, you must first create the expense report header, and then add an expense to the report. Once you have created an expense report header and you have added an expense, you can then save the report. Though there are many different kinds of expenses that you can add to a report, this task provides instructions for creating an expense report header, adding a basic expense item, and saving the report. For instructions on adding credit card expenses, split receipt expenses, and summary expenses, refer to the additional tasks in this section.

Additionally, if you need information or instructions about what to enter in a specific field when creating an expense report, see *Entering Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*.

To create a basic expense report:

1. Open the application by tapping the Enter Expense icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. The Expense Entry screen displays all of your reports that are currently pending completion in both list and graphic format. Tap the Add button at the top of the list of reports to create a new report.

Figure 24–1 Add Expense Report Header

The screenshot shows the 'Expense Entry' mobile application interface. At the top, there's a status bar with 'Carrier', '11:08 AM', and '100%' battery. Below that, a navigation bar includes 'Charts', 'Expense Entry', and 'Add Expense'. The main content area is split into two panels. The left panel, titled 'PENDING COMPLETION', shows a list of reports under 'My Reports' and 'Employees' tabs. The right panel is the 'Report' form, which includes fields for 'Report Description' (January Business Trip), 'Report Type' (Travel and Entertainment), 'Report End Date' (Jan 31, 2015), and 'Default Business Purpose' (Business Meetings). At the bottom of the form, there are radio buttons for 'Single Currency' (selected) and 'Multiple Currency'.

3. Enter a report description and then select a report type from the drop-down menu.
4. Complete the Per Diem Days field, if applicable. The display of this field is controlled by processing options from the selected version of the P09E2011.
5. Specify whether the report contains expenses in a single currency or multiple currencies.
6. To add a report-level note to the report, tap the Notes tab, enter your note, and then tap Save. Each time you enter a note, you append to the previous notes entered for the report. You cannot edit a note once you save it.
7. Tap the Add Expense button at the top right of the screen.

Note that you must add an expense to the report before you can save the report. If you exit the report before creating and saving an expense, the system does not save the report.

This task describes adding a basic expense item to the report. If you want to add summary expenses, split expenses, or credit card expenses to the report, see the additional tasks in this chapter for instructions.

Figure 24–2 Add Basic Expense

8. On the Expense Detail tab, select a value from the Expense Category drop-down menu. The remaining fields on the screen are displayed and enabled based on the type of expense category you select.
Complete all remaining required fields on the screen.
9. Note that if you created a multi-currency report, a field is enabled next to the Expense Amount field. This field is for the currency code. If you leave this field blank, the system uses the default currency code, based on your expense system setup. Additionally, when you save the item, the system also calculates and displays the value in the Exchange Rate field. This value is also based on the setup of your expense system.
10. If you are entering an expense that is based on a rate, such as mileage, the system retrieves the rate as it is defined in the P09E108 program. The rate setup from the P09E108 also determines whether the you can edit the rate.
11. Select a value from the Charge To drop-down menu to specify where the expense should be charged. The value that you select in this field determines which additional fields display at the bottom of the screen. For example, if you select Business Unit, the system displays the Business Unit field to enable you to specify the business unit to which the system will charge the expense.

Figure 24–3 Charge To Business Unit

Note: You can choose to charge the expense to multiple jobs, business units, or work orders. These are called split receipt expenses. For instructions on entering these expenses, see [Section 24.3.2, "Entering a Split Receipt Expense Using the Mobile Expense Entry Tablet Application"](#)

12. Tap the Additional tab and complete any required fields, or necessary optional fields, for your expense detail item. The fields that display on this tab are user-defined fields that your organization has set up. Different fields display based on the selected expense category. If your organization does not have any user-defined fields for the selected expense category, the system displays a message notifying you that no additional fields have been set up.

Additionally, if this tab contains required fields, you must complete them before saving your expense. If you attempt to save your expense item, and receive an error that more data is required, verify that you have completed all of the required fields on this tab.

13. To add a note to the expense item, tap the Notes tab and enter a text note.
14. When you have completed the expense entry, tap the Save button at the top right of the screen.

The system updates the total at the top of the screen, saves the expense, creates and displays a receipt label (if your system is set up to use receipt labels), adds the expense to the list on the left side of the screen, and clears the fields on the right side of the screen so that you can enter another expense.

If your Expense Management system is set up to use daily allowances, the system displays errors and warnings if your expenses exceed the daily allowance specified by your organization's expense policy. While the system does allow you to continue by clicking OK and clicking Save again, the errors and warnings are displayed on the expense item.

15. To add photos to the expense item, tap the Menu button at the top right, and then tap Detail Photos. Select an existing photo, or capture a new photo, and then save it. Tap the Back button to return to the report. Note that you cannot attach a photo to an expense item until after you have created and saved the expense item.
16. To enter additional basic expenses, complete steps 8 through 16. To enter other types of expense items to the report, see the additional tasks in this chapter.
When you have entered all of your expenses, tap the Reports button at the top left of the screen to return to the main Expense Entry screen, and then tap Save.
17. To add a report-level photo to the report, tap the menu button at the top right of the screen, and then tap Photos. Select a photo from your image gallery, or capture a photo with your device, and then tap Save.
Note that you cannot attach a photo to the report until after you save the report.
18. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

24.3.2 Entering a Split Receipt Expense Using the Mobile Expense Entry Tablet Application

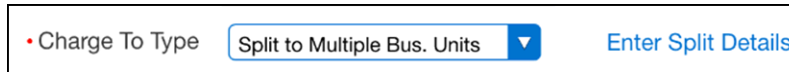
You enter a split receipt expense when you want to charge a portion of a single expense item to multiple accounts. For example, if a project manager is traveling to

visit two different job sites, she might want to split the cost of her travel expenses between the two jobs.

To enter a split receipt expense, you must first create a report header. See [Section 24.3.1, "Entering an Expense Report Using the Mobile Expense Entry Tablet Application"](#) for instructions.

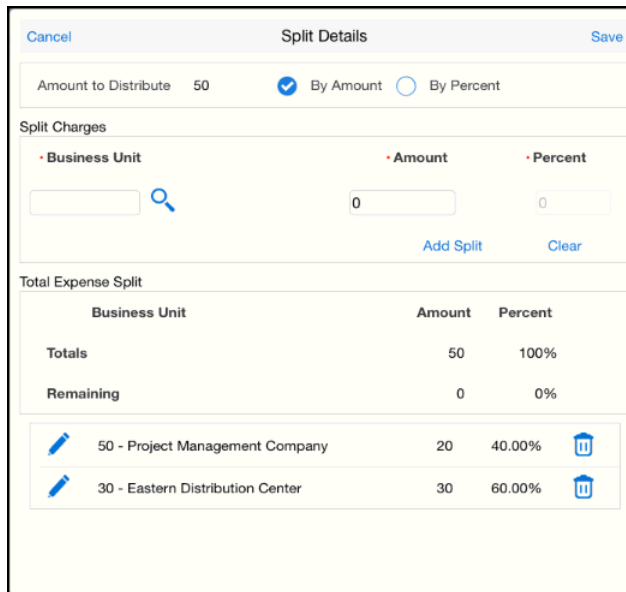
1. After you have created your report header, tap Add Expense.
2. Complete the required fields, as described in the previous task.
3. From the Charge To Type drop-down menu, select one of the following options to split an expense:
 - Split to Multiple Work Orders
 - Split to Multiple Jobs
 - Split to Multiple Bus. Units
4. After you select one of these options, tap the Enter Split Details button.

Figure 24–4 Split to Multiple Work Orders



5. On the Split Details screen, select By Amount or By Percent. The fields in the Split Charges section of the screen are enabled based on your selection.

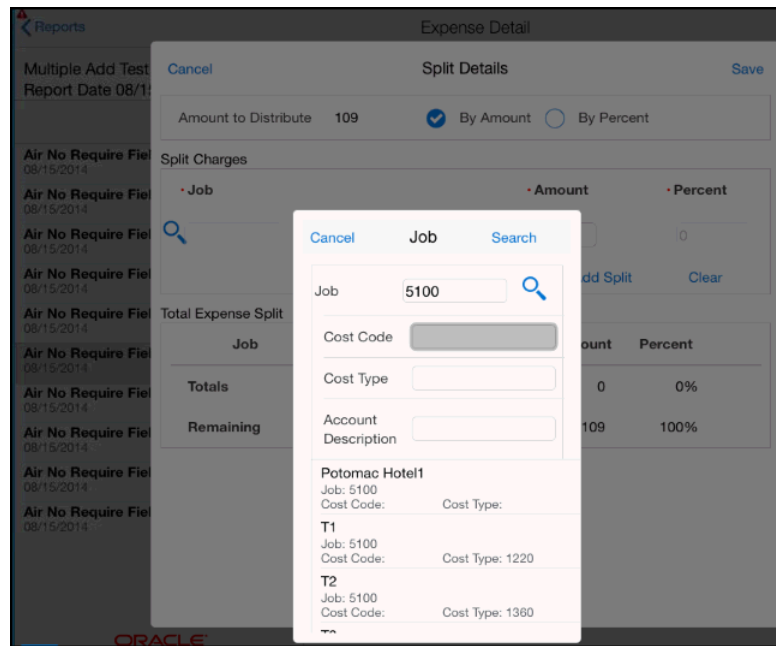
Figure 24–5 Split Details



6. Specify the Business Unit, Work Order or Job, and then specify the corresponding amount or percent to charge to that entity.

Note: You can use the visual assist to search for a value for Business Unit and Work Order, or you can manually enter the value. However, if you select Job, you must use the visual assist to search for and select a valid value. To select a valid job value from the Job search and select screen, enter the Job number, Cost Code, or Job Type, tap the Search button, and then tap the record you want to use. The system returns you to the Split Details screen with the selected job account details.

Figure 24–6 Job Search and Select



7. Tap the Add Split button.
8. Review your entry in the Total Expense Split section of the screen. The system displays the remaining amount or percent that you must add before saving. The entire amount of the expense must be accounted for before you can save the split details.

To edit a split charge entry, tap the Edit button to the left of the entry. To delete an entry, tap the Delete button to the right of the entry.

9. Continue to enter split charges until the remaining amount and percent is zero, and then tap Save. The remaining amount must be zero in order to save the split and exit out of the Split Details form.

Note: Be aware that none of the split charge details are saved until you tap the Save button. Additionally, you must return to the Expense Detail screen and save the expense to add it to the report.

Also be aware that if you want to change the charge to type of the split entry, you must first delete existing split details and save the record. Once the amount allocated is zero, you can change the charge to type, and then enter split details for the new type.

10. On the Expense Detail screen, tap Save to add the expense to the report.

When you have entered all of your expenses, tap the Reports button at the top left of the screen to return to the main Expense Entry screen.

- To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

24.3.3 Entering a Summary Expense Using the Mobile Expense Entry Tablet Application

You enter a summary receipt expense when you have multiple expense items on a single receipt. For example, while on a business trip, you might receive a single bill from your hotel that includes charges for your lodging and several meals. You use the summary expense process to enter these types of expenses on an expense report.

To enter a summary receipt expense, you must first create a report header. See [Section 24.3.1, "Entering an Expense Report Using the Mobile Expense Entry Tablet Application"](#) for instructions.

- After you have created your report header, tap Add Expense.
- At the top right of the expense entry screen, tap the Summary Receipt option.
- Enter the total value of the receipt in the Summary Receipt Total field, and then tap Add Item to Summary to enter individual expenses.

Figure 24–7 Add Summary Expense Item

The screenshot shows the 'Expense Detail' screen for 'Report 546' with a total of 160.50 USD. The report is in 'PENDING COMPLETION' status and categorized as 'Travel and Entertainment'. The left sidebar shows a 'SUMMARY RECEIPT' for 200.00 USD and a 'HOTEL EXPENSE' for 160.50 USD. The main form has three tabs: 'Expense Detail', 'Additional', and 'Notes'. The 'Expense Detail' tab is selected, showing a 'Summary Receipt Total' of 200, a 'Remaining Amount to Distribute' of 39.5, and a 'Save Item to Summary Receipt' button. Below this are fields for 'Expense Category' (dropdown), 'Expense Date' (Jan 28, 2015), 'Payment Method' (Corporate Credit Card), 'Location' (DEN), 'Expense Amount' (0), and 'Rate/Quantity' (0).

- On the Expense Detail screen, complete all of the necessary fields for the expense item, including any necessary fields on the Additional tab.

To add notes, tap the Notes tab, and enter a note. Be aware that when you enter a note on either the parent or any child item for a summary expense, the note is added to the parent record for the summary receipt, and is viewable from all records associated with that summary expense.

When you have entered all necessary information, return to the Expense Detail tab and tap the Save Item to Summary Receipt button above the expense to add it to the report.

When you save the expense, the system updates the Remaining Amount to Distribute field, telling you how much of the summary receipt is still awaiting distribution. The system also uses the location and payment method from the first expense item you entered as the default values for all remaining expense items associated with that receipt.

5. To add additional items to the summary receipt, tap the Add Item to Summary button, and enter expense items until the Remaining Amount to Distribute value is 0 (zero).

Note: You can save the report before fully distributing the summary receipt. However, the system displays a warning in the parent summary expense record in the left-hand list telling you that the summary receipt is over or under allocated. Additionally, you cannot submit the report until the summary receipt is fully distributed.

6. Tap the Save button at the top right of the screen when you are finished.
7. To return to the main Reports screen, tap the Reports button. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

24.3.4 Entering Credit Card Expenses Using the Mobile Expense Entry Tablet Application

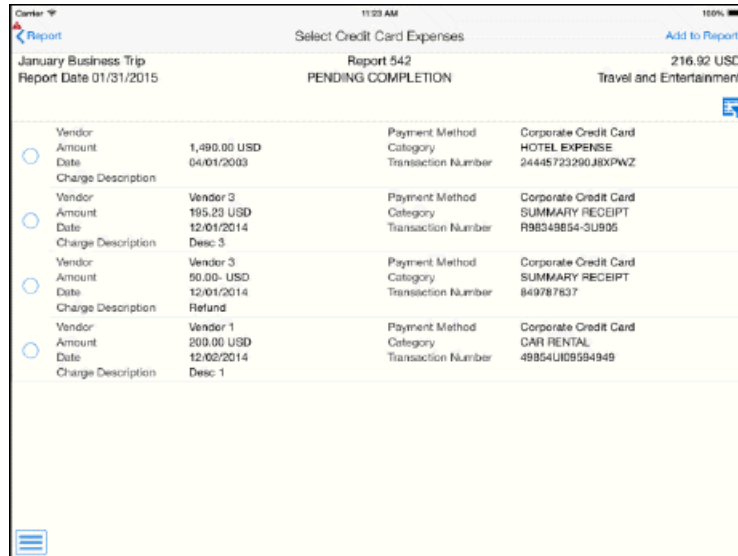
If your organization is set up to enable you to automatically include expenses from your credit card(s) on your expense report, you can view and select credit card expenses to add to your expense report.

To enter credit card expenses, you must first create a report header. See [Section 24.3.1, "Entering an Expense Report Using the Mobile Expense Entry Tablet Application"](#) for instructions.

1. After you have created your report header, tap Add Expense.
2. On the Expense Detail screen, tap the Credit Card button at the top of the list.
3. On the Select Credit Card Expenses screen, select the charges that you want to add to your report. You can use filters to limit the records that are displayed on the screen by date or by a payment method.

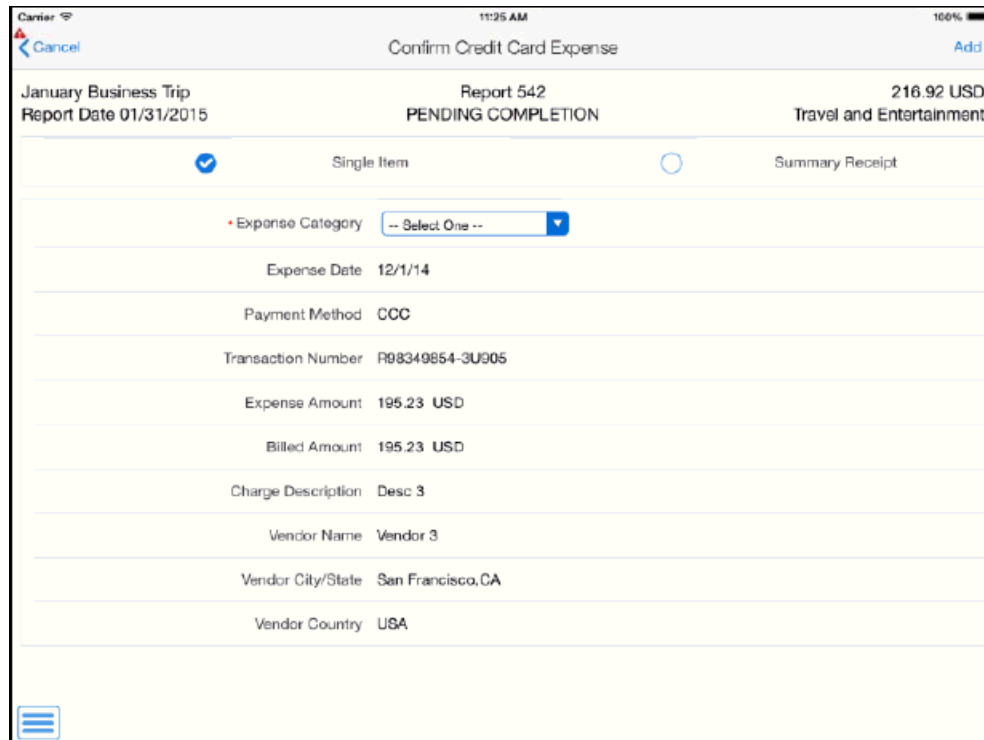
After selecting the records to include, tap the Add to Report button at the top right of the screen.

Figure 24–8 Select Credit Card Expenses



- The system displays the first selected record on the Confirm Credit Card Expense screen.

Figure 24–9 Confirm Credit Card Expense



- Select an expense category, specify whether the expense is a single or a summary expense, and then click the Add button at the top right of the screen.
- Complete all necessary fields to finish entering the expense, including fields on the Additional and Notes tab. At this point, the instructions for entering the expense are the same as those for non-credit card expenses. See the other tasks in this chapter for information.

7. When finished updating the expense item, tap the Done button at the top of the screen. The system adds the expense to the report, and displays the next selected credit card expense. When there are no additional expenses selected, the system returns you to the report header.

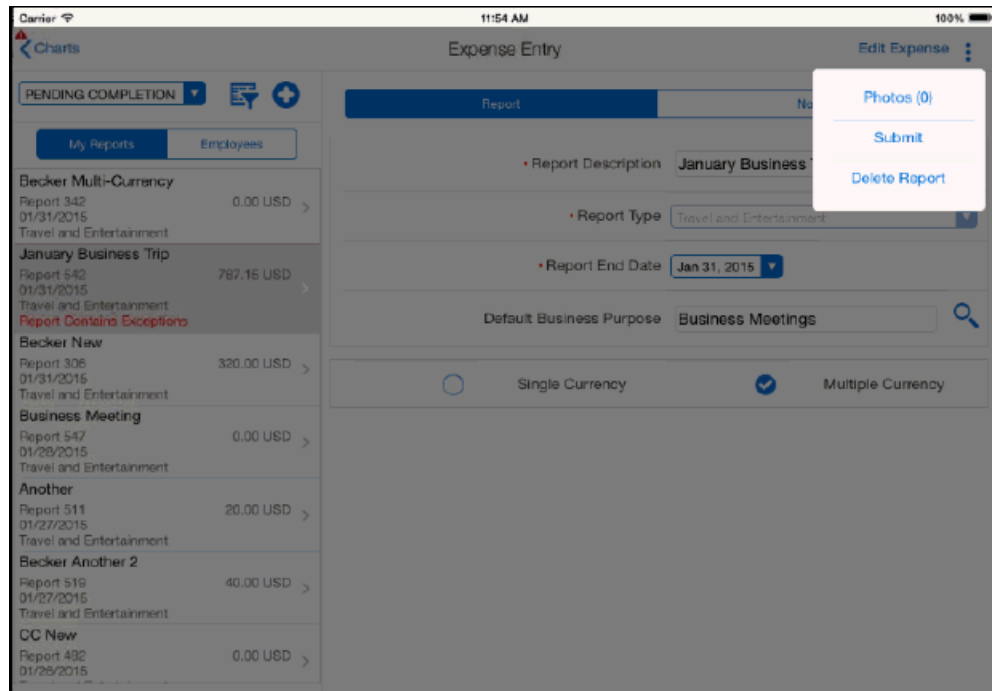
Note, if you tap the Cancel button, the system will not add the currently displayed expense to the report, and will display the next selected expense. If no other expenses were selected, the system returns you to the report header.

8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

24.3.5 Reviewing, Editing and Submitting Expense Reports Using the Mobile Expense Entry Tablet Application

To review, edit, or submit an expense report:

1. Open the application by tapping the Enter Expense icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. The Expense Entry screen displays all of your reports that are currently pending completion in both list and graphic format.
3. You can refine your list by:
 - Selecting a value from the Report Status drop-down menu.
 - Tapping the Filter button and entering date and report type filter criteria.
 - Tapping a bar or section of one of the charts on the right of the screen.
4. To review a report, tap the record in the list on the left side of the screen. The system displays the details of that report on the right side of the screen.
5. Tap the Edit Expense button at the top right to review and edit the expenses associated with the selected report.
6. On the Expense Detail screen, select an expense that you want to review or edit from the list. On the right side of the screen, update the expense, and then tap the Save button at the top right of the screen.
7. To submit the report for processing, tap the Menu button at the top right of the screen, and then tap Submit. If the report is not at a status where it can be submitted, the system does not display this option. Tap Submit again to submit the report, or tap Cancel if you do not want to submit the report.

Figure 24–10 Submitting an Expense Report

8. Alternatively, you can delete the report by tapping the Menu button at the top right, and tapping Delete Report. If the report is not at a status where it can be deleted, the system does not display this option. Tap Delete again to delete the report, or tap Cancel if you do not want to delete the report.
9. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

24.4 Using the Expense Entry Mobile Smartphone Application

The Expense Entry mobile smartphone application enables you to:

- Enter basic expense reports.
- Enter summary receipt items on an expense report.
- Attach credit card transactions to an expense report.
- Enter split expenses on an expense report.
- Review, update, and submit your expense reports.
- Review your employees' expense reports.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Enter Expense icon and log in.

24.4.1 Entering a Basic Expense Report Using the Mobile Expense Entry Smartphone Application

When creating an expense report, you must first create the expense report header, and then add an expense to the report. Once you have created an expense report header and you have added an expense, the application then saves the report. Though there

are many different kinds of expenses that you can add to a report, this task provides instructions for creating an expense report header, adding a basic expense item, and saving the report. For instructions on adding credit card expenses, split receipt expenses, and summary expenses, refer to the additional tasks in this section.

Additionally, if you need information or instructions about what to enter in a specific field when creating an expense report, see *Entering Expense Reports in the JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*.

To create a basic expense report:

1. Open the application by tapping the Enter Expense icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. The Expense Entry screen displays all of your reports that are currently pending completion. Tap the Add button at the top right of the screen to create a new report.
3. On the Add Report screen, enter a report description and then select a report type from the drop-down menu.

Figure 24–11 Add Report

The screenshot shows the 'Add Report' screen on an iPod. At the top, there is a navigation bar with a back arrow, 'Reports', 'Add Report', and a 'Next' button. Below this is a tabbed interface with 'Report' and 'Notes' tabs. The 'Report' tab is active. The form contains the following fields:

- Report Description:** A text input field.
- Report Type:** A dropdown menu with the text '-- Select One --' and a downward arrow.
- Report End Date:** A date picker field.
- Per Diem Days:** A text input field.
- Default Business Purpose:** A text input field.

At the bottom left, there is a hamburger menu icon.

4. If applicable to your report, complete the Per Diem Days and Manager Override fields. Additionally, enter a date in the Report End Date field.

Note: The display of the Per Diem Days and Manager Override fields are controlled by processing options from the selected version of the P09E2011.

5. Specify whether the report contains expenses in a single currency or multiple currencies.
6. To add a report-level note to the report, tap the Notes tab, enter your note. Each time you enter a note, you append to the previous notes entered for the report. You cannot edit a note once you save it.

Tap the Next button. If there are credit card expenses, then the system displays the credit card expenses automatically in the Transactions screen. If there are no credit card expenses, then the system returns you to the Add Expense screen, where you can add the first expense item to the report.

Note that you must add an expense to the report before the report is saved. If you exit the report before creating and saving an expense, the system does not save the report.

This task describes adding a basic expense item to the report. If you want to add summary expenses, split expenses, or credit card expenses to the report, see the additional tasks in this chapter for instructions.

Figure 24–12 Add Expense

7. On the Details tab, select a value from the Expense Category drop-down menu. The remaining fields on the screen are displayed and enabled based on the type of expense category you select.
Complete all remaining required fields on the screen.
8. Note that if you created a multi-currency report, a field is enabled next to the Expense Amount field. This field is for the currency code. If you leave this field blank, the system uses the default currency code, based on your expense system

setup. Additionally, when you save the item, the system also calculates and displays the value in the Exchange Rate field. This value is also based on the setup of your expense system.

9. If you are entering an expense that is based on a rate, such as mileage, the system retrieves the rate as it is defined in the P09E108 program. The rate setup from the P09E108 also determines whether you can edit the rate.
10. Select a value from the Charge To drop-down menu to specify where the expense should be charged. The value that you select in this field determines which additional fields display at the bottom of the screen. For example, if you select Business Unit, the system displays the Business Unit field to enable you to specify the business unit to which the system will charge the expense.

Note: You can choose to charge the expense to multiple jobs, business units, or work orders. These are called split receipt expenses. For instructions on entering these expenses, see [Section 24.4.2, "Entering a Split Receipt Expense Using the Mobile Expense Entry Smartphone Application"](#)

11. Tap the Additional tab and complete any required fields, or necessary optional fields, for your expense detail item. The fields that display on this tab are user-defined fields that your organization has set up. Different fields display based on the selected expense category. If your organization does not have any user-defined fields for the selected expense type, the system displays a message notifying you that no additional fields have been set up.

Additionally, if this tab contains required fields, you must complete them before saving your expense. If you attempt to save your expense item, and receive an error that more data is required, verify that you have completed all of the required fields on this tab.

12. To add a note to the expense item, tap the Notes tab and enter a text note.
13. When you have completed the expense item, tap the Save button at the top right of the screen. The system clears all of the fields on the Add Expense screen so you can easily add another expense detail item to the report.

Note that you must save an expense detail record before you can attach a photo to that expense item. See [Section 24.4.5, "Reviewing, Editing, and Submitting Expense Reports Using the Mobile Expense Entry Smartphone Application"](#)

14. To enter additional basic expenses, complete steps 8 through 14. To enter other types of expense items to the report, see the additional tasks in this chapter.

When you have entered all of your expenses, tap the Done button at the top left, and then tap the Back button at the top left of the screen to return to the main Expense Entry screen.

15. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

24.4.2 Entering a Split Receipt Expense Using the Mobile Expense Entry Smartphone Application

You enter a split receipt expense when you want to charge a portion of a single expense item to multiple accounts. For example, if a project manager is traveling to

visit two different job sites, she might want to split the cost of her travel expenses between the two jobs.

To enter a split receipt expense, you must first create a report header. See [Section 24.4.1, "Entering a Basic Expense Report Using the Mobile Expense Entry Smartphone Application"](#)

1. After you have created your report header, tap the Next button.
2. Complete the required fields, as described in the previous task.
3. From the Charge To Type drop-down menu, select one of the following options to split an expense:
 - Split to Multiple Work Orders
 - Split to Multiple Jobs
 - Split to Multiple Bus. Units
4. After you select one of these options, tap the Enter Split Details button.
5. On the Split Details screen, tap the Add Split button.

Figure 24–13 Split Details

Split Details		
Amount to Distribute	876	
Distributed		
Amount	876	100%
Remaining		
Amount	0	0%
Add Split		
1 - Financial/Distribution Company	>	
Amount:	550	63%
9 - Corporate Administration	>	
Amount:	326	37%

6. On the Split Charges screen, select By Amount or By Percent. The fields in the Split Charges section of the screen are enabled based on your selection.
7. Specify the Business Unit, Work Order or Job, and then specify the corresponding amount or percent to charge to that entity.

Note: You can use the visual assist to search for a value for Business Unit and Work Order, or you can manually enter the value. However, if you select Job, you must use the visual assist to search for and select a valid value. To select a valid job value from the Job search and select screen, enter the Job number, Cost Code, or Job Type, tap the Search button, and then tap the record you want to use. The system returns you to the Split Charges screen with the selected job account details.

8. Tap the Done button.
9. Review your entry in the Split Details screen. The system displays the remaining amount or percent that you must add before saving. The entire amount of the expense must be distributed before you can save the split details.

To add another split charge, tap the Add Split button again, and complete the steps to add a split charge. Complete these steps until you have fully distributed the expense, and then tap the Save button at the top right of the screen. On the Expense Detail screen, tap Save.

Note: Be aware that none of the split charge details are saved until you tap the Save button. Additionally, you must return to the Expense Detail screen and save the expense to add it to the report.

10. To edit a split charge entry, select the record you want to edit from the Split Details screen, make any necessary changes on the Split Charges screen, and then click Done.

To delete a split charge entry, select the record you want to delete from the Split Details screen. On the Split Charges screen, tap the Delete button at the bottom of the screen.

Note that if you want to change the expense from being a split receipt expense to a regular expense item, you must delete the record, and then add it again as a non-split expense. You cannot change a split expense to a non-split expense once you have saved it.
11. When you have entered all of your expenses, tap the Back button at the top left of the screen to return to the main Expense Entry screen.
12. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

24.4.3 Entering a Summary Expense Using the Mobile Expense Entry Smartphone Application (Release 9.1 Update)

You enter a summary receipt expense when you have multiple expense items on a single receipt. For example, while on a business trip, you might receive a single bill from your hotel that includes charges for your lodging and several meals. You use the summary expense process to enter these types of expenses on an expense report.

To enter a summary receipt expense, you must first create a report header. See [Section 24.4.1, "Entering a Basic Expense Report Using the Mobile Expense Entry Smartphone Application"](#) for instructions.

1. After you have created your report header, tap the Next button in the Add Report screen.

- On the Add Expense screen, tap the Summary Receipt option.

Figure 24–14 Add Expense

- Enter the total value of the receipt in the Summary Receipt Total field, and then enter individual expenses.
- On the Add Expense screen, complete all of the necessary fields for the expense item, including any necessary fields on the Additional tab.

To add notes, tap the Notes tab, and enter a note. Be aware that when you enter a note on either the parent or any child item for a summary expense, the note is added to the parent record for the summary receipt and is viewable from all records associated with that summary expense.

When you have entered all necessary information, tap the Save button to add it to the report.

When you save the expense, the system updates the Remaining Amount to Distribute field, showing you how much of the summary receipt is still awaiting distribution. The system also uses the location and payment method from the first expense item that you entered as the default values for all remaining expense items associated with that receipt.

- To add additional items to the summary receipt, enter expense items until the Remaining Amount to Distribute value is 0 (zero).

Note: You can save the report before fully distributing the summary receipt. However, the system displays a warning in the parent summary expense record in the Expense Detail screen stating that the summary receipt is over or under allocated. Additionally, you cannot submit the report until the summary receipt is fully distributed.

6. Tap the Done button at the top left of the screen when you are finished, the system will return to the Expense Detail screen.
7. To return to the main Reports screen, tap the Reports button. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

24.4.4 Entering Credit Card Expenses Using the Mobile Expense Entry Smartphone Application (Release 9.1 Update)

If your organization is set up to enable you to automatically include expenses from your credit cards on your expense report, you can view and select credit card expenses to add to your expense report.

To enter credit card expenses, you must first create a report header. See [Section 24.4.1, "Entering a Basic Expense Report Using the Mobile Expense Entry Smartphone Application"](#) for instructions.

1. After you have created your report header, tap the Next button on the Add Report screen.

If there are credit card transactions, then the system automatically takes you to the Transactions screen that shows the credit card transactions.

Note: You can add credit card expenses either by tapping the Add Credit Card Expense button on the Expense Detail screen or by tapping the Next button on the Add Report screen.

2. On the Transactions screen, select the charges that you want to add to your report. You can use filters to limit the records that are displayed on the screen by date or by a payment method.

Tap on the credit card transaction to view details of the transaction in the Detail screen.

After selecting the records to include, tap the Apply button at the top right of the screen.

3. The system displays the first selected record on the Confirm Expense screen.

Figure 24–15 Confirm Expense

PENDING COMPLETION
 435 - Office Relocation
 10.00 USD 05/18/2016

Single Item
 Summary Receipt

Expense Category
 Airfare Expense

Expense Date
 5/1/16

Payment Method
 AMX

Transaction Number
 11

4. Select an expense category, specify whether the expense is a single expense or a summary expense and then click the Next button at the top right of the screen.
Note that by default the system displays the single item expense.
5. On the Add Expense screen, complete all necessary fields to finish entering the expense on the Details tab, including fields on the Additional and Notes tabs. At this point, the instructions for entering the expense are the same as those for non-credit card expenses. See the other tasks in this chapter for information.
6. When you have finished updating the expense item, tap the Save button at the top of the screen.
The system adds the expense to the report and displays the next selected credit card expense. When there are no additional expenses selected, the system returns you to the Expense Detail screen.
Note that if you tap the Cancel button, the system will not add the currently displayed expense to the report and will display the next selected expense. If no other expenses were selected, the system returns you to the Expense Detail screen.
7. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

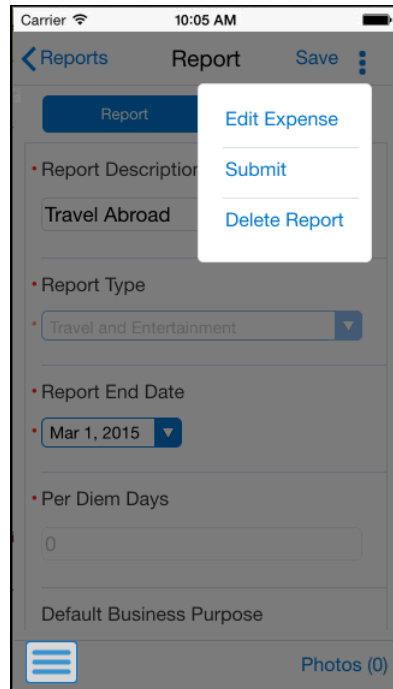
24.4.5 Reviewing, Editing, and Submitting Expense Reports Using the Mobile Expense Entry Smartphone Application

To review, edit, or submit an expense report:

1. Open the application by tapping the Enter Expense icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. The Expense Entry screen displays all of your reports that are currently pending completion.
3. You can refine your list by:
 - Selecting a value from the Report Status drop-down menu.
 - Tapping the Filter button and entering date and report type filter criteria.
4. To review a report, tap the record in the list.

5. To add a photo to the report, tap the Photos button at the bottom right, select or capture a photo, and then tap Save.
6. To edit expense items, on the Report screen, tap the menu button at the top right and then tap Edit Expense.

Figure 24–16 Edit Expense Menu Item



7. On the Expense Detail screen, select an expense that you want to review or edit from the list.
8. On the Expense screen, update any fields you want to change, and then tap the Save button at the top right of the screen. Additionally, you can attach photos to the expense item by tapping the Photo button at the bottom right of the screen. Capture a new photo or select a photo from your image gallery, and then tap Save.
9. When you have finished updating expense items, tap the Back button to return to the Report screen.
10. To submit the report for processing, tap the Menu button at the top right of the screen, and then tap Submit. If the report is not at a status where it can be submitted, the system does not display this option.
11. Confirm your submission, or tap Cancel if you do not want to submit the report.
12. Alternatively, you can delete the report by tapping the Menu button at the top right, and tapping Delete Report. If the report is not at a status where it can be deleted, the system does not display this option.
13. Confirm your deletion, or tap Cancel if you do not want to delete the report.
14. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

G/L Batch Approvals Mobile Applications

This chapter discusses these topics:

- [Section 25.1, "G/L Batch Approvals Mobile Applications Overview"](#)
- [Section 25.2, "Setting Up the G/L Batch Approvals Mobile Applications"](#)
- [Section 25.3, "Using the G/L Batch Approvals Mobile Tablet Application"](#)
- [Section 25.4, "Using the G/L Batch Approvals Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Working with Batches" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*
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25.1 G/L Batch Approvals Mobile Applications Overview

You use the G/L Batch Approvals mobile applications to review and approve batches of journal entries on a mobile device.

The G/L Batch Approvals mobile applications give you the ability to:

- Review all journal entry batches that are in pending status.
- Review documents in a batch.
- Review line-level information for a document.
- Approve a journal entry batch.
- Review text attachments and photos associated with each journal entry line.

This table lists the applications that are available to review and approve journal entry batches:

Type of Application	Additional Information
Base EnterpriseOne application	Use the Work With Batches application (P0011) in the JD Edwards EnterpriseOne system to review and approve journal entry batches.

Type of Application	Additional Information
Tablet application	G/L Batch Approvals (M09011) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards G/L Batch Approvals
Smartphone application	G/L Batch Approvals (M09012) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards G/L Batch Approvals

Before using the G/L Batch Approvals tablet or smartphone application, you must perform the following setup tasks:

- Activate batch security, and set up secured users and approvers.
- Set up the processing options for the mobile applications.
- Verify the processing options for the base EnterpriseOne application.

25.1.1 Differences and Limitations: G/L Batch Approvals

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Batches Available for Review

The G/L Batch Approvals mobile applications are set up to process and display only those journal entry batches that are in pending status. However, in the base EnterpriseOne application, you can review batches that are at any status.

Revising Batch Information and Batch Status

Using the G/L Batch Approvals mobile applications, you can review batches of journal entries, and transaction details of the journal entries. You cannot revise existing transaction information or add transactions to a batch. However, in the base EnterpriseOne system, you can review and revise transaction details for a journal entry batch and also add transactions to a batch.

The G/L Batch Approvals mobile applications do not provide the option of reverting the status of a batch from approved to pending. However, in the base EnterpriseOne application, you can revert the status of a batch from approved to pending if a batch needs further analysis.

Text and Image Attachment Functionality

Using the G/L Batch Approvals mobile applications, you can review text and image attachments associated with journal entry lines. You cannot revise existing attachments or add new attachments. However, in the base EnterpriseOne system, you can review and revise existing attachments, and also add new attachments.

25.2 Setting Up the G/L Batch Approvals Mobile Applications

Before you use the G/L Batch Approvals mobile applications (M09011 and M09012), you must complete the following setups:

- Activate batch security, and set up secured users and approved users.

Secured users can only review batch information and are restricted from approving batches. Approved users can review and approve batches for secured users.

See "Setting Up Approved and Secured Users" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

- Set up the processing options for the GL Batch Approval mobile applications (M09011 and M09012) in the JD Edwards EnterpriseOne system.
- Verify that the version of the Work With Batches program (P0011) that you specify in the processing options of the tablet and smartphone applications is set up with the appropriate value in the Batch Type processing options. The Work With Batches program must include the G/L batch type for these mobile applications to function properly.

See "Setting Processing Options for Batches (P0011)" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

25.2.1 Setting Processing Options for the G/L Batch Approvals Tablet Application (M09011)

You use processing options to specify default processing information for a program.

25.2.1.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify which version of the Work With Batches program (P0011) the system uses to display and process journal entry batches. The version that you specify here must have the G/L batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0001.

2. General Journal Review (P0911B) Version

Use this processing option to specify which version of the General Journal Review program (P0911B) the system uses to display journal entries in a batch. If you leave this processing option blank, the system uses ZJDE0001.

3. Journal Entry (P0911) Version

Use this processing option to specify which version of the Journal Entry program (P0911) the system uses to display transaction details associated with a journal entry document. If you leave this processing option blank, the system uses ZJDE0001.

25.2.2 Setting Processing Options for the G/L Batch Approvals Smartphone Application (M09012)

You use processing options to specify default processing information for a program.

25.2.2.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify which version of the Work With Batches program (P0011) the system uses to display and process journal entry batches. The version that you specify here must have the G/L batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0001.

2. General Journal Review (P0911B) Version

Use this processing option to specify which version of the General Journal Review program (P0911B) the system uses to display journal entries in a batch. If you leave this processing option blank, the system uses ZJDE0001.

3. Journal Entry (P0911) Version

Use this processing option to specify which version of the Journal Entry program (P0911) the system uses to display transaction details associated with a journal entry document. If you leave this processing option blank, the system uses ZJDE0001.

25.3 Using the G/L Batch Approvals Mobile Tablet Application

The G/L Batch Approvals tablet application enables you to review journal entries that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the G/L Appr icon and log in.

25.3.1 Reviewing Journal Entry Batches Using a Mobile Tablet

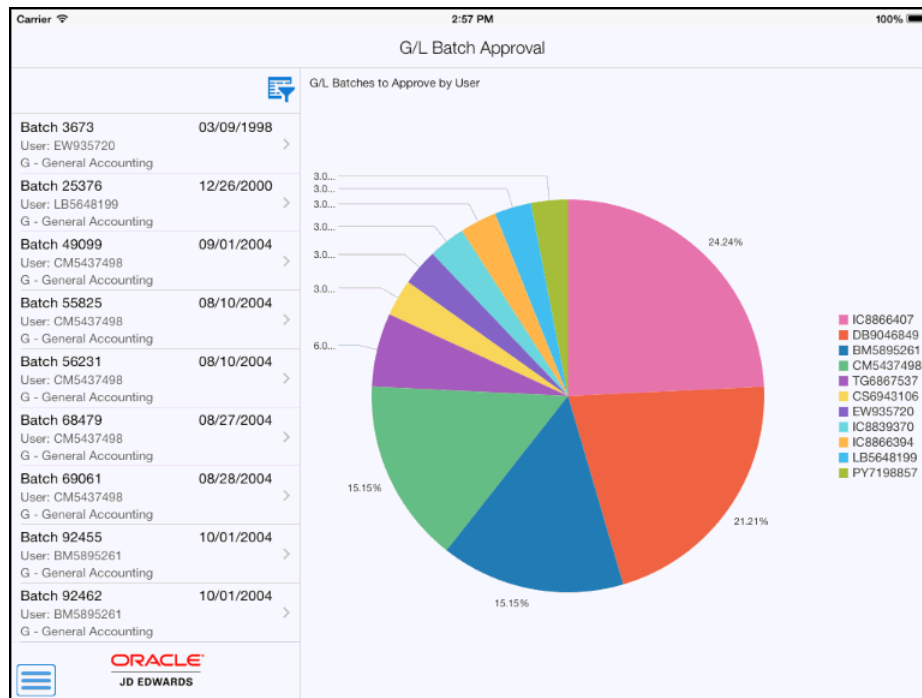
To review batches of journal entries using a mobile tablet:

1. Open the application by tapping the G/L Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the G/L Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 25–1 G/L Batch Approval Home Screen: Tablet



The batches categorized by users are graphically displayed in the G/L Batches to Approve by User section. Each colored portion of the graph depicts the percentage of the batches that are yet to be approved for each user.

3. To refine the batches that appear on your screen, tap the filter icon at the top of the left pane.

You can use these fields to filter the batches:

- Batch Date
- User
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of batches that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

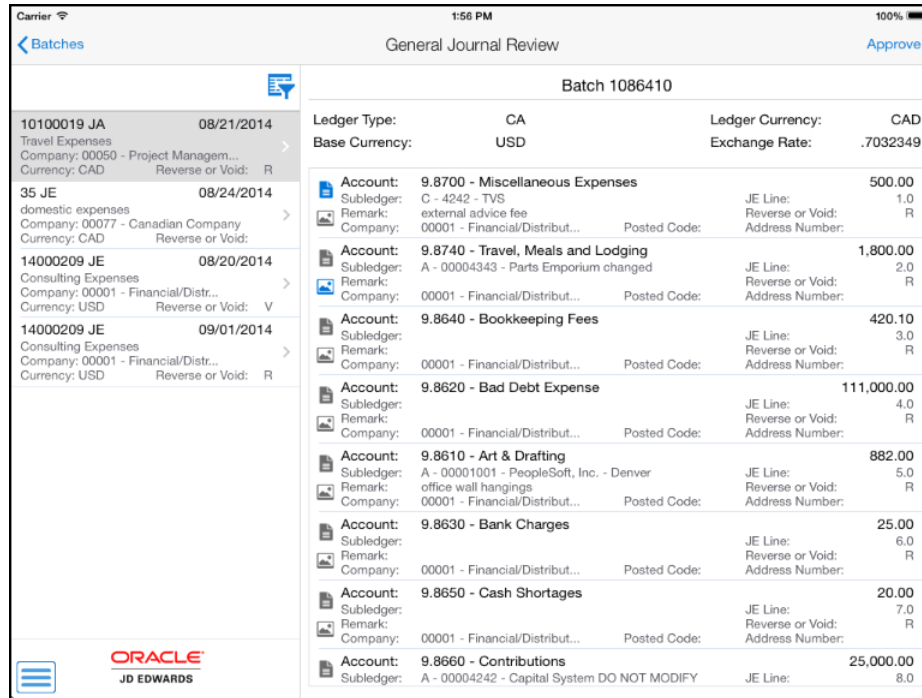
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of batches associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified and to enter new filter values, tap the Clear button.

5. To review a batch, tap the batch from the list of batches.

Figure 25–2 General Journal Review Screen: Tablet



6. The system takes you to the General Journal Review screen that has a list of documents associated with the batch. In the right pane, the system displays header information and the line-level details of the first document in the list.
7. To refine the documents that appear on your screen, tap the filter icon at the top of the left pane.
 You can use these fields to filter the documents:
 - Document Type
 - Document Number
 - Document Company
 - G/L Date
 - Explanation
8. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays documents based on your filter values.
 To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.
 To delete all filter values you specified, and to enter new filter values, tap the Clear button.
9. To review line-level information of a different document, tap the document. The selected document is highlighted in the document list. On the right pane, you can:
 - Review the document header information, such as ledger type, ledger currency, base currency, and exchange rate.

- Review line-specific information, such as the account number and description, subledger information, the journal entry line number, remark, posted code, address number, whether the entry is a reverse or void, and the amount.
- To review text attachments associated with a journal entry line, tap the top icon on the left of the line. The system retrieves the text attachment from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to a journal entry line, tap the icon below the text attachment icon. The system displays the photos screen with a list of photos in the left pane, and the first photo in the list on the right pane.

When there are no image and text attachments associated with the journal entry line, the icons are disabled.

10. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

25.3.2 Approving Journal Entry Batches Using a Mobile Tablet

Complete the following actions to approve journal entry batches:

1. Open the application by tapping the G/L Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the G/L Batch Approval home screen, you can view the list of batches that are currently awaiting approval.
3. Tap the batch that you want to approve. The system takes you to the General Journal Review screen.
4. To approve the batch, tap the Approve button.
5. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

If you are not an approver, the system displays an error message when you select the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed.

6. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

25.4 Using the G/L Batch Approvals Mobile Smartphone Application

The G/L Batch Approvals smartphone application enables you to review journal entries that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the G/L Appr icon and log in.

25.4.1 Reviewing Journal Entry Batches Using a Mobile Smartphone

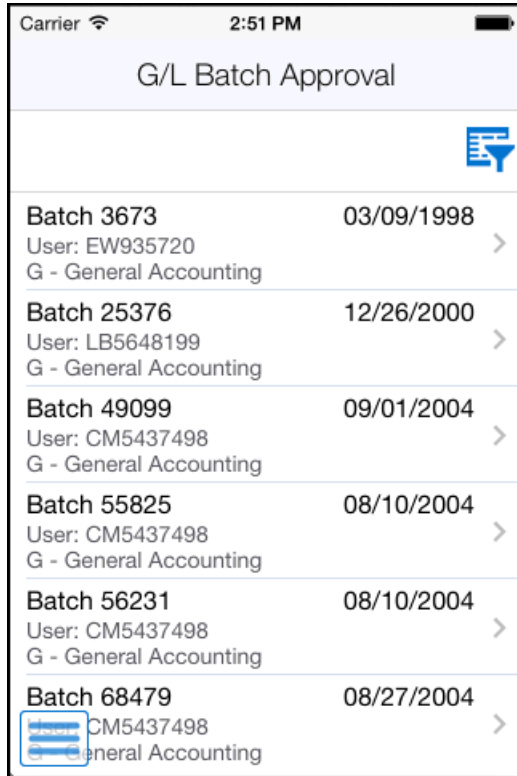
To review batches of journal entries using a mobile smartphone:

1. Open the application by tapping the G/L Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the G/L Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 25–3 G/L Batch Approval Home Screen: Smartphone



3. To refine the batches that appear on your screen, tap the filter icon at the top right of the screen.

You can use these fields to filter the batches:

- Batch Date
- User
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of batches that are displayed based on your filter values.
 - Saves the filter values that you entered. The next time you open the filter screen, the system displays the filter values.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of batches associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

5. To review a batch, tap the batch from the list of batches.

The system takes you to the screen that has a list of documents associated with the batch.

Figure 25–4 List of Documents: Smartphone



6. To refine the documents that appear on your screen, tap the filter icon at the top right of your screen.

You can use these fields to filter the documents:

- Document Type
- Document Number
- Document Company
- G/L Date
- Explanation

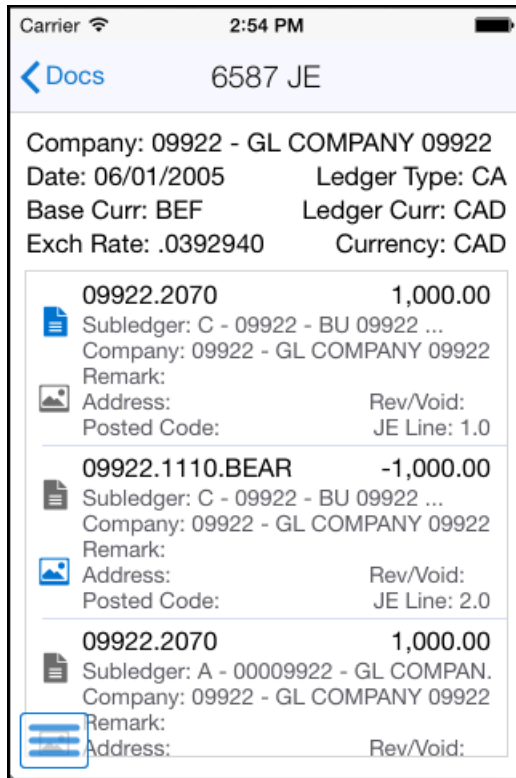
7. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays documents based on your filter values.

To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

8. To view line-level information of the document, tap the document.

Figure 25–5 Document Details: Smartphone



9. The system displays the document screen, and you can:
 - Review the document header information, such as company, ledger type, ledger currency, base currency, and exchange rate.
 - Review line-specific information, such as the account number and description, company address number and description, subledger information, the journal entry line number, remark, posted code, address number, whether reverse or void, and the amount.
 - To review text attachments associated with a journal entry line, tap the top icon on the left of the line. The system retrieves the text attachment from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to a journal entry line, tap the icon below the text attachment icon. The system displays the Photos screen with a list of photos in the left pane, and the first photo in the list on the right pane.
 When there are no image and text attachments associated with the journal entry line, the icons are disabled.
10. To go back to the list of documents in the batch, tap the Docs button at the top left of the screen.

11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

25.4.2 Approving Journal Entry Batches Using a Mobile Smartphone

Complete the following actions to approve journal entry batches:

1. Open the application by tapping the G/L Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the G/L Batch Approval home screen, you can view the list of batches that are currently awaiting approval.
3. Tap the batch that you want to approve. The system takes you to the screen that has a list of documents associated with the batch.
4. To approve the batch, tap the Approve button.
5. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

If you are not an approver, the system displays an error message when you select the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed.

6. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Invoice Batch Approvals Mobile Applications

This chapter discusses these topics:

- [Section 26.1, "Invoice Batch Approvals Mobile Applications Overview"](#)
- [Section 26.2, "Setting Up the Invoice Batch Approvals Mobile Applications"](#)
- [Section 26.3, "Using the Invoice Batch Approvals Mobile Tablet Application \(M03B03\)"](#)
- [Section 26.4, "Using the Invoice Batch Approvals Mobile Smartphone Application \(M03B04\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Working with Batches" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.
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26.1 Invoice Batch Approvals Mobile Applications Overview

You use the Invoice Batch Approvals mobile applications to review and approve batches of invoices on a mobile device.

The Invoice Batch Approvals mobile applications give you the ability to:

- Review all invoice batches that are in pending status.
- Review invoices in a batch.
- Review line-level information for an invoice.
- Approve an invoice batch.
- Review text attachments and photos associated with each invoice.

This table lists the applications that are available to review and approve invoice batches:

Type of Application	Additional Information
Base EnterpriseOne application	Use the Work With Batches program (P0011) in the JD Edwards EnterpriseOne system to review and approve invoice batches.
Tablet application	Invoice Batch Approvals (M03B03) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Invoice Batch Approvals
Smartphone application	Invoice Batch Approvals (M03B04) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Invoice Batch Approvals

Before using the Invoice Batch Approvals tablet or smartphone application, you must perform the following setup tasks:

- Activate batch security, and set up secured users and approvers.
- Set up the processing options for the mobile applications.
- Verify the processing options for the base EnterpriseOne application.

26.1.1 Differences and Limitations: Invoice Batch Approvals

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset functionality available in the base software.

Batches Available for Review

The Invoice Batch Approvals mobile applications are set up to process and display only those invoice batches that are in pending status. However, in the base EnterpriseOne application, you can review batches of any status.

Revising Batch Information and Batch Status

Using the Invoice Batch Approvals mobile applications, you can review batches of invoice entries and the transaction details in each invoice. You cannot revise existing invoice details or add invoices to a batch. However, in the base EnterpriseOne system, you can review and revise invoice details, and also add invoices to an invoice batch.

The Invoice Batch Approvals mobile applications do not provide the option of reverting the status of a batch from approved to pending. However, in the base EnterpriseOne application, you can revert the status of a batch from approved to pending if a batch needs further analysis.

Text and Image Attachment Functionality

Using the Invoice Batch Approvals mobile applications, you can review text and image attachments associated with invoice entries. You cannot revise existing attachments or add new attachments. However, in the base EnterpriseOne system, you can review and revise existing attachments, and also add new attachments.

26.2 Setting Up the Invoice Batch Approvals Mobile Applications

Before you use the Invoice Batch Approvals mobile applications (M03B03 and M03B04), you must complete the following setup:

- Activate batch security and set up secured users and approved users.

Secured users can only review batch information and are restricted from approving batches. Approved users can review and approve batches for secured users.

See "Setting Up Approved and Secured Users" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

- Set up the processing options for the Invoice Batch Approvals mobile applications (M03B03 and M03B04) in the JD Edwards EnterpriseOne system.
- Verify that the version of P0011 that you specify in the processing options of the tablet and smartphone applications is set up with the appropriate value in the Batch Type processing options. The P0011 program must include the invoice batch type for these mobile applications to function properly.

See "Setting Processing Options for Batches (P0011)" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

26.2.1 Setting Processing Options for the Invoice Batch Approvals Tablet Application (M03B03)

You use processing options to specify default processing information for a program.

26.2.1.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify which version of the Work With Batches program (P0011) the system uses to display and process invoice batches. The version that you specify here must have the invoice batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0005.

2. Invoice Journal Review (P03B11A) Version

Use this processing option to specify which version of the Invoice Journal Review program (P03B11A) the system uses to display invoice entries in a batch. If you leave this processing option blank, the system uses version ZJDE0001.

3. Standard Invoice Entry (P03B11) Version

Use this processing option to specify which version of the Standard Invoice Entry program (P03B11) the system uses to display transaction details associated with a standard invoice entry. If you leave this processing option blank, the system uses ZJDE0001.

26.2.2 Setting Processing Options for the Invoice Batch Approvals Smartphone Application (M03B04)

You use processing options to specify default processing information for a program.

26.2.2.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify which version of the Work With Batches program (P0011) the system uses to display and process invoice batches. The version that you specify here must have the invoice batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0005.

2. Invoice Journal Review (P03B11A) Version

Use this processing option to specify which version of the Invoice Journal Review program (P03B11A) the system uses to display invoice entries in a batch. If you leave this processing option blank, the system uses version ZJDE0001.

3. Standard Invoice Entry (P03B11) Version

Use this processing option to specify which version of the Standard Invoice Entry program (P03B11) the system uses to display transaction details associated with a standard invoice entry. If you leave this processing option blank, the system uses ZJDE0001.

26.3 Using the Invoice Batch Approvals Mobile Tablet Application (M03B03)

The Invoice Batch Approvals tablet application enables you to review invoice batches that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download and install the application from the application store onto your device.

To open the application, tap the Invoice Appr icon and log in.

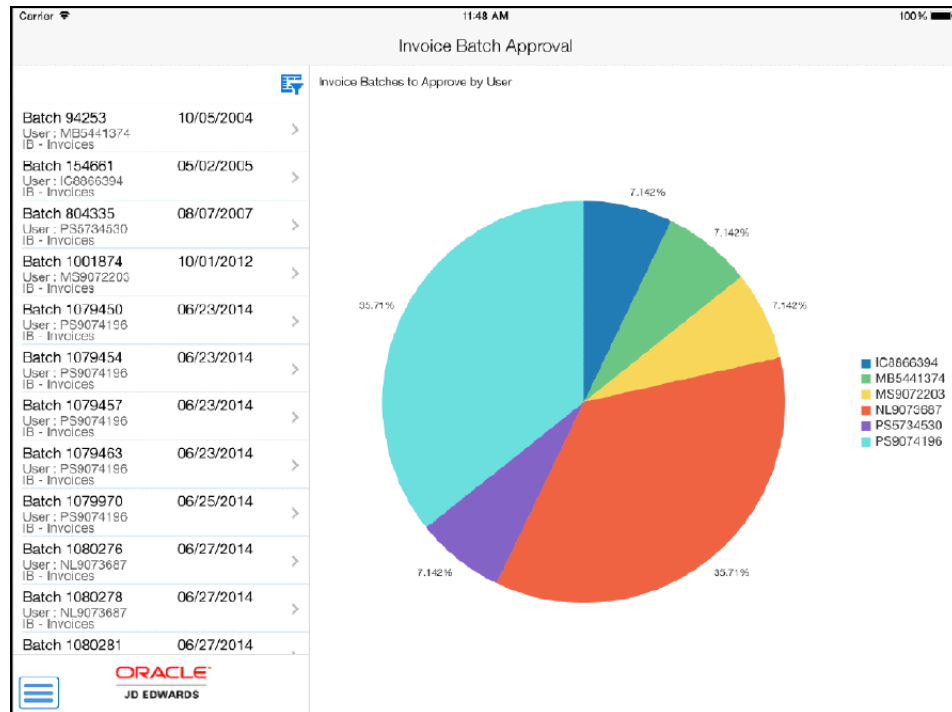
26.3.1 Reviewing Invoice Batches Awaiting Approval Using a Mobile Tablet Application

To review batches of invoice entries using a tablet:

1. Open the application by tapping the Invoice Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Invoice Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 26–1 Invoice Batch Approval Home Screen: Tablet

The batches are categorized by users and are graphically displayed in the Invoice Batches to Approve by User section. Each colored portion of the pie chart depicts the percentage of the batches that are awaiting approval for each user.

- To refine the list of batches displayed, tap the Filter button at the top of the left pane. You can filter the batches by:

- Batch Date
- User
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

- In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of batches that are displayed based on your filter values
- Saves the filter values that you entered

The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of batches associated with the last saved filter values, if applicable
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

4. To review the details of a batch, tap the batch from the list of batches.

Figure 26–2 Invoice Journal Review - Invoice Details Screen: Tablet

The screenshot displays the 'Invoice Journal Review' screen for 'Batch 1083909'. The interface is split into two main panes. The left pane lists invoices with columns for invoice number and date. Two invoices are visible: 3150 RI and 3151 RI, both dated 08/23/2014. Each invoice entry includes a brief description and financial details such as Domestic Amount and Foreign Amount. The right pane shows the 'Invoice Details' for the selected invoice, including customer information (4343 - Parts Emporium changed), invoice date (08/29/2014), company (00050 - Project Management Company), and payment terms. Below this, there are two line items for 'Business Unit: 1 - Financial/Di...'. The first line item has a gross amount of 30,900.00 and a payment status of 'A'. The second line item has a gross amount of 89,000.00 and a payment status of 'H'. The bottom of the screen features the Oracle JD Edwards logo.

5. The system displays the Invoice Journal Review screen. The left pane has a list of invoices associated with the batch.

For an invoice that involves foreign amounts, the foreign amount and the foreign currency is displayed in the list.

In the right pane, the system displays the header and the line-level details of the first invoice in two tabs: Invoice Details and G/L Distribution. The Invoice Details tab is displayed by default.

6. To refine the list of invoices displayed, tap the Filter button at the top of the left pane. You can filter invoices by:
 - Invoice Number
 - G/L Date
 - Invoice Type
 - Invoice Company
 - Customer Name
7. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays invoices based on your filter values.

To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

8. To review details of a different invoice, tap the invoice in the left pane. The selected invoice is highlighted in the invoice list. In the Invoice Details tab on the right pane, you can:
 - Review the invoice header information, such as customer name and number, company name and number, invoice date, G/L date, payment terms, and exchange rate (if the invoice is for a foreign transaction).
 - Review line-level details of the invoice, such as the business unit, due date, discount due date, gross amount, open amount, discount available, payment status, and remark.
 - Review text and photo attachments associated with an invoice entry. Tap the first button on the left of the line to open the text attachments. The system retrieves the text attachment from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to an invoice entry, tap the button below the text attachment button. The system displays the photos in a different screen with a list of photos in the left pane, and the first photo in the list, on the right pane.

When there are no image and text attachments associated with the invoice, the buttons are disabled.
9. To review general ledger distribution information, tap the G/L Distribution tab. You can review header information, such as the customer name and number, amount to distribute, explanation, exchange rate, and G/L date.

Below the header information, you can review line-level details of how the invoice amount is distributed to multiple accounts. You can tap on the text and image buttons to view text and image attachments.

Figure 26–3 Invoice Journal Review - G/L Distribution Screen: Tablet

Carrier 1:18 PM 100%

← Batches Invoice Journal Review Approve

Batch 1083909

Invoice Details	G/L Distribution
3150 RI 08/23/2014 Parts Emporium changed Company : 00050 - Project Management ... Domestic Amount : 113,670.81 USD Foreign Amount : 150,000.00 EUR	Customer: 4343 - Parts Emporium changed Amount to Distribute: 0.00 Explanation: Parts Emporium changed Exchange Rate: .7578054 G/L Date: 08/23/2014
3151 RI 08/23/2014 Parts Emporium changed Company : 00050 - Project Management ... Domestic Amount : 90,860.87 USD Foreign Amount : 119,900.00 EUR	Account: 1.4222.NY - New York Unemployment Tax Amount: 119,900.00- Subledger: remark8 Subledger Type: Explanation: 00001 - Financial/Distribution Company Posted Code: Company:

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JD EDWARDS

10. To return to the list of batches, tap the Batches button at the top left of the screen.
11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

26.3.2 Approving Invoice Batches Using a Mobile Tablet Application

To approve invoice batches:

1. Open the application by tapping the Invoice Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Invoice Batch Approval home screen, you can view the list of invoice batches that are currently awaiting approval.

2. Tap the batch that you want to approve. The system displays the Invoice Journal Review screen.
3. Tap the Approve button at the top of the screen.
4. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

Note: If you are not authorized to approve batches, the system displays an error message when you tap the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed in the list.

5. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

26.4 Using the Invoice Batch Approvals Mobile Smartphone Application (M03B04)

The Invoice Batch Approvals smartphone application enables you to review invoice entries that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download and install the application from the application store onto your device.

To open the application, tap the Invoice Appr icon and log in.

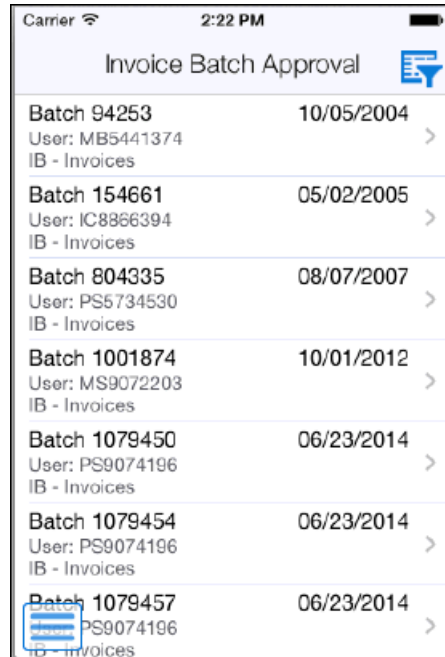
26.4.1 Reviewing Invoice Batches Awaiting Approval Using a Mobile Smartphone Application

To review batches of invoice entries using a smartphone:

1. Open the application by tapping the Invoice Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Invoice Batch Approval home screen, you can view the list of invoice batches that are currently awaiting approval.

Figure 26–4 Invoice Batch Approval Home Screen - Smartphone

- To filter the list of batches displayed, tap the Filter button at the top of the pane. You can refine the batches by:

- Batch Date
- User
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

- In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of batches that are displayed based on your filter values
- Saves the filter values that you entered

The next time you open the filter screen, the system displays the saved filter values.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of batches associated with the last saved filter values, if applicable
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

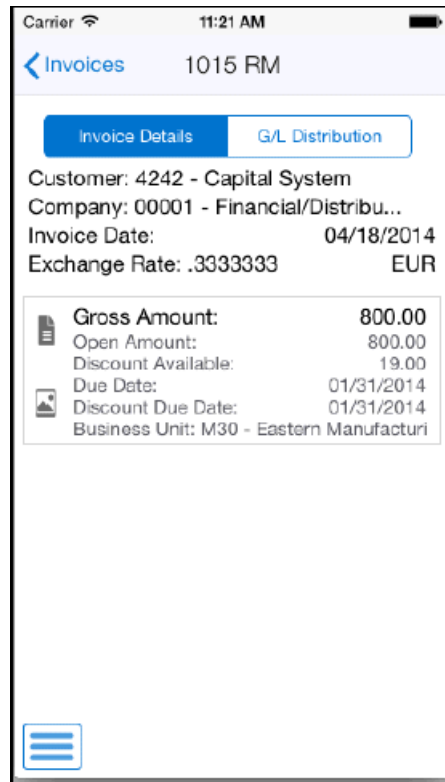
- To review a batch, tap the batch from the list of batches.

Figure 26–5 List of Invoices: Smartphone

5. The system displays a list of invoices associated with the selected batch. For an invoice that involves foreign amounts, the foreign amount and the foreign currency are displayed in the list.
6. To filter invoices from the list, tap the Filter button at the top of the pane. You can refine invoices by:
 - Invoice Number
 - G/L Date
 - Invoice Type
 - Invoice Company
 - Customer Name
7. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays invoices based on your filter values.

To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.
8. To review line-level details of an invoice, tap the invoice. The system displays the Invoice Details screen.

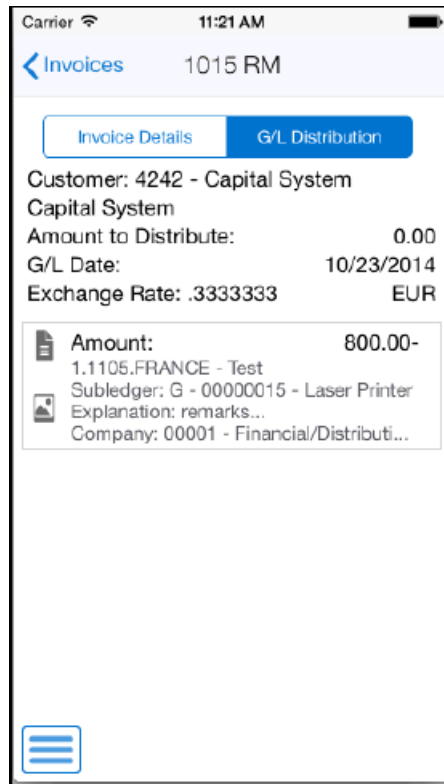
Figure 26–6 Invoice Details Screen: Smartphone

On the Invoice Details screen, you can:

- Review the header information, such as customer name and number, company name and number, invoice date, and exchange rate.
- Review line-level details of the invoice, such as the gross amount, open amount, discount available, due date, discount due date, and business unit.
- Review text and photo attachments associated with an invoice entry. Tap the first button on the left of the line to open the text attachments. The system retrieves the text attachment from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to an invoice entry, tap the button below the text attachment button. The system displays the photos in a different screen with a list of photos in the left pane, and the first photo in the list, on the right pane.

When there are no image and text attachments associated with the invoice, the buttons are disabled.

9. To review G/L distribution information, tap the G/L Distribution tab. You can review header information, such as the customer name and number, amount to distribute, explanation, exchange rate, and G/L date.

Figure 26–7 G/L Distribution Screen: Smartphone

Below the header information, you can review line-level details of how the invoice amount is distributed to multiple accounts. You can tap on the text and image buttons to view text and image attachments.

10. To return to the list of invoices in the batch, tap the Invoices button at the top of the screen.
11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

26.4.2 Approving Invoice Batches Using a Mobile Smartphone Application

To approve invoice batches:

1. Open the application by tapping the Invoice Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Invoice Batch Approval home screen, you can view the list of invoice batches that are currently awaiting approval.

2. Tap the batch that you want to approve. The system displays the batch details.
3. Tap the Approve button at the top of the screen.
4. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

Note: If you are not authorized to approve batches, the system displays an error message when you tap the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed in the list.

5. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Payment Batch Approvals Mobile Applications

This chapter discusses these topics:

- [Section 27.1, "Payment Batch Approvals Mobile Applications Overview"](#)
- [Section 27.2, "Setting Up the Payment Batch Approvals Mobile Applications"](#)
- [Section 27.3, "Using the Payment Batch Approvals Mobile Tablet Application \(M04132\)"](#)
- [Section 27.4, "Using the Payment Batch Approvals Mobile Smartphone Application \(M04131\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- *"Working with Batches" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide.*
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27.1 Payment Batch Approvals Mobile Applications Overview

You use the Payment Batch Approvals mobile applications to review and approve batches of payments on a mobile device.

The Payment Batch Approvals mobile applications give you the ability to:

- Review all payment batches that are in pending status.
- Review payments and their vouchers in a batch.
- Review line-level information for a payment in a batch.
- Approve a payment batch.
- Review text attachments and photos associated with each payment.

This table lists the applications that are available to review and approve payment batches:

Type of Application	Additional Information
Base EnterpriseOne application	Use the Work With Batches application (P0011) in the JD Edwards EnterpriseOne system to review and approve payment batches.
Tablet application	Payment Batch Approvals (M04132) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Payment Batch Approvals
Smartphone application	Payment Batch Approvals (M04131) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Payment Batch Approvals

Before using the Payment Batch Approvals tablet or smartphone application, you must perform the following setup tasks:

- Activate batch security, and set up secured users and approvers.
- Set up the processing options for the mobile applications.
- Verify the processing options for the base EnterpriseOne application.

27.1.1 Differences and Limitations: Payment Batch Approvals

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Batches Available for Review

The Payment Batch Approvals mobile applications are set up to process and display only those payment batches that have a pending status. However, in the base EnterpriseOne application, you can review batches of any status.

Revising Batch Information and Batch Status

Using the Payment Batch Approvals mobile applications, you can review batches of payments and the transaction details in each payment. You cannot revise existing payment details or add payments to a batch. However, in the base EnterpriseOne system, you can review and revise payment details, and also add vouchers to a payment batch.

The Payment Batch Approvals mobile applications do not provide the option of reverting the status of a batch from approved to pending. However, in the base EnterpriseOne application, you can revert the status of a batch from approved to pending if a batch needs further analysis.

Text and Image Attachment Functionality

Using the Payment Batch Approvals mobile applications, you can review text and image attachments associated with payments. You cannot revise existing attachments or add new attachments. However, in the base EnterpriseOne system, you can review and revise existing attachments, and also add new attachments.

27.2 Setting Up the Payment Batch Approvals Mobile Applications

Before you use the Payment Batch Approvals mobile applications (M04132 and M04131), you must complete the following setup:

- Activate batch security and set up secured users and approved users.

Secured users can only review batch information and are restricted from approving batches. Approved users can review and approve batches for secured users.

See "Setting Up Approved and Secured Users" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

- Set up the processing options for the Payment Batch Approvals mobile applications (M04132 and M04131) in the JD Edwards EnterpriseOne system.
- Verify that the version of the Work With Batches program (P0011) that you specify in the processing options of the tablet and smartphone applications is set up with the appropriate value in the Batch Type processing options. The Work With Batches program must include the payment batch type for these mobile applications to function properly.

See "Setting Processing Options for Batches (P0011)" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

27.2.1 Setting Processing Options for the Payment Batch Approvals Tablet Application (M04132)

You use processing options to specify default processing information for a program.

27.2.1.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify which version of the Work With Batches program (P0011) the system uses to display and process payment batches. The version that you specify here must have the payment batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0004.

2. Payment Batch Review (P0413C) Version

Use this processing option to specify which version of the Payment Batch Review program (P0413C) the system uses to display payment batch details. If you leave this processing option blank, the system uses version ZJDE0001.

3. A/P Manual Payments (P0413M) Version

Use this processing option to specify which version of the A/P Manual Payments program (P0413M) the system uses to display manual payment batch details. If you leave this processing option blank, the system uses ZJDE0001.

4. A/P Standard Voucher Entry (P0411) Version

Use this processing option to specify which version of the A/P Standard Voucher Entry program (P0411) the system uses to display payments details for a voucher. If you leave this processing option blank, the system uses ZJDE0001.

27.2.2 Setting Processing Options for the Payment Batch Approvals Smartphone Application (M04131)

You use processing options to specify default processing information for a program.

27.2.2.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify which version of the Work With Batches program (P0011) the system uses to display and process payment batches. The version that you specify here must have the payment batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0004.

2. Payment Batch Review (P0413C) Version

Use this processing option to specify which version of the Payment Batch Review program (P0413C) the system uses to display payment batch details. If you leave this processing option blank, the system uses version ZJDE0001.

3. A/P Manual Payments (P0413M) Version

Use this processing option to specify which version of the A/P Manual Payments program (P0413M) the system uses to display manual payment batch details. If you leave this processing option blank, the system uses ZJDE0001.

4. A/P Standard Voucher Entry (P0411) Version

Use this processing option to specify which version of the A/P Standard Voucher Entry program (P0411) the system uses to display payments details for a voucher. If you leave this processing option blank, the system uses ZJDE0001.

27.3 Using the Payment Batch Approvals Mobile Tablet Application (M04132)

The Payment Batch Approvals tablet application enables you to review payment batches that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download the application from the application store and install it on your device.

To open the application, tap the Payment Appr icon and log in.

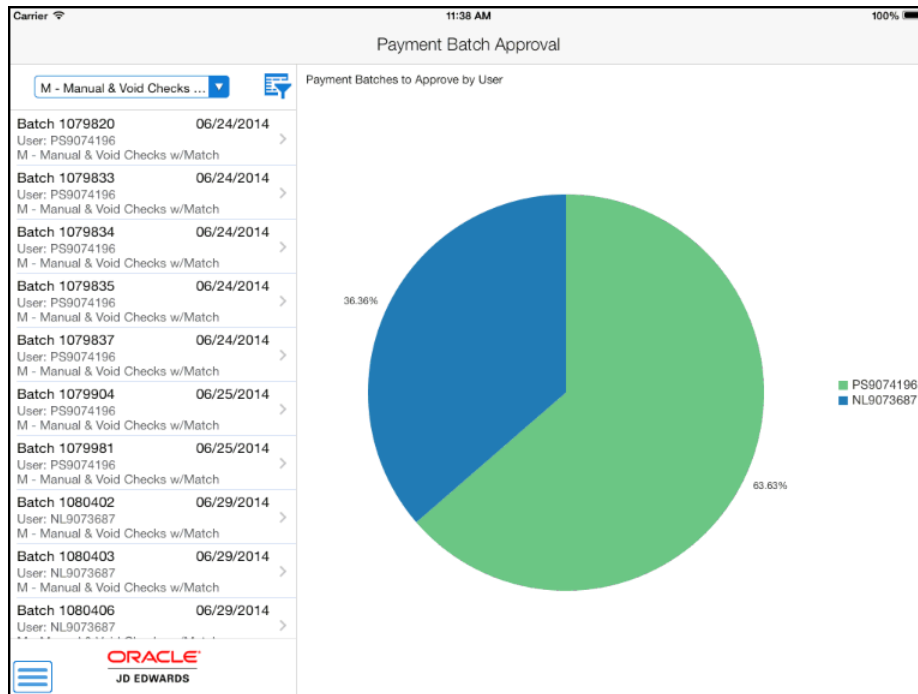
27.3.1 Reviewing Payment Batches Using a Mobile Tablet Application

To review batches of payments using a tablet:

1. Open the application by tapping the Payment Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Payment Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 27–1 Payment Batch Approval Home Screen: Tablet

The batches are categorized by users and are graphically displayed in the Payment Batches to Approve by User section. Each colored portion of the pie chart depicts the percentage of batches that are yet to be approved for each user.

2. To refine the list of batches displayed, tap the Filter button at the top of the left pane. You can filter the batches by:

- Batch Date
- User ID
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

3. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of batches that are displayed based on your filter values
- Saves the filter values that you entered

The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

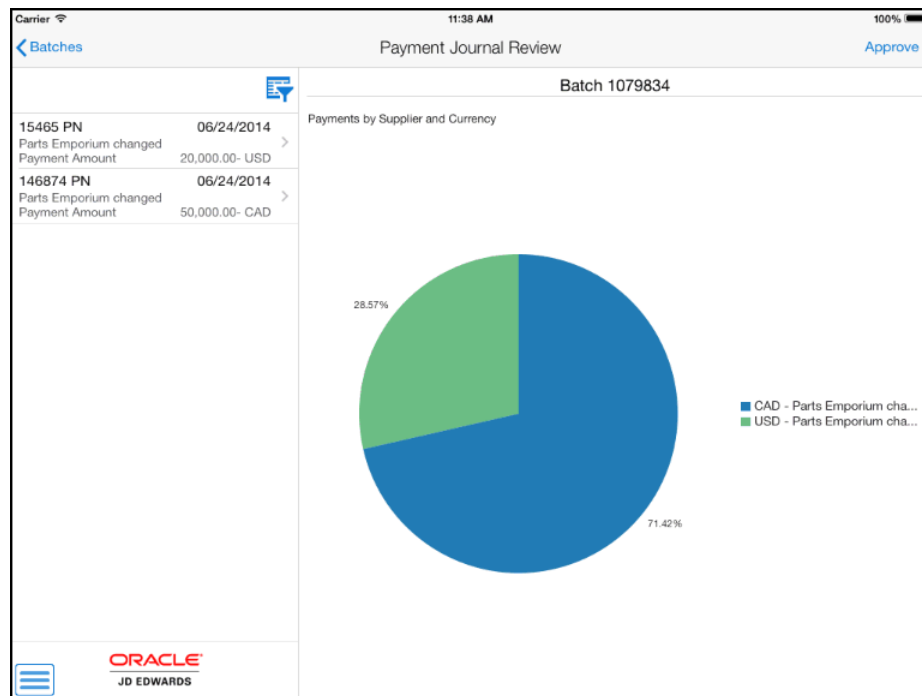
- Takes you to the list of batches associated with the last saved filter values, if applicable
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

4. To review the details of a batch, tap the batch from the list of batches.

The system takes you to the Payment Journal Review screen that has a list of payments associated with the batch. In the right pane, the Payments by Supplier and Currency section graphically displays the categorization of payments based on the supplier and currency amount.

Figure 27–2 Payment Journal Review: Tablet



5. To refine the list of payments displayed, tap the Filter button at the top of the left pane. You can filter payments by:
 - Payment Number
 - Payment Type
 - Currency Code
 - G/L Date
6. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays vouchers based on your filter values.

To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

7. To review the details of a payment, tap the payment from the list in the left pane.

The system takes you to the Payment Details screen. In the header, the system displays the payment details, such as batch number, payment document number, payee, payment date, account, payment amount, and base currency. If the

payment involves foreign amounts, the exchange rate and currency is also displayed.

In the left pane, the system displays a list of vouchers associated with the payment. For a voucher that involves foreign amounts, the foreign amount and the foreign currency is displayed in the list. In the right pane, the Voucher Details tab is open by default, and the system displays header information and line-level details of the selected voucher.

Figure 27–3 Payment Details - Voucher Details Screen: Tablet

Payments		Payment Details	
Batch:	1079833	Payment:	14578
Payee:	4343 - Parts Emporium changed	Payment Date:	06/24/2014
Account:	1.1110.BEAR - Bear Creek National Bank	Payment Amount:	128,000.00 USD
Exchange Rate:	0.0000000	Base Currency:	USD
2011874 PV 05/01/2005 4343 - Parts Emporium changed Company: 00019 - Brenda's Cash F... Payment Amount 58,000.00 USD		Voucher Details G/L Distribution	
2011875 PV 05/01/2005 4343 - Parts Emporium changed Company: 00019 - Brenda's Cash F... Payment Amount 70,000.00 USD		Invoice Number: 05405A Service/Tax Date: 05/01/2005 Business Unit: 19A - Basic BU Invoice Date: 05/01/2005 Payment Terms: G/L Date: 05/10/2005	
		Tax Rate Area: Tax Ex: Gross Amount: 58,000.00 Due Date: 05/01/2005 Pay Status: P Taxable Amount: 0.00 Remark: Tax Amount: 0.00	

In the Voucher Details tab in the right pane, you can:

- Review the voucher header information, such as invoice number, service/tax date, business unit, invoice date, payment terms, and G/L date.
- Review line-specific information, such as the tax rate/area, tax explanation code, due date, pay status, gross amount, taxable amount, tax amount details, and remarks associated with the line.
- Review text and photo attachments associated with a voucher line. Tap the first button on the left of the line to open the text attachments. The system retrieves the text attachments from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to a voucher line, tap the button below the text attachment button. The system displays the photos in a different screen with a list of photos in the left pane, and the first photo in the list, in the right pane.

When there are no image and text attachments associated with the voucher entry, the buttons are disabled.

8. To review general ledger distribution information, tap the G/L Distribution tab. You can review header information, such as the supplier address, amount to distribute, explanation, and G/L date.

Below the header information, you can review line-level details of how the invoice amount is distributed to multiple accounts. You can tap on the text and image buttons to view text and image attachments.

9. To return to the list of payments in the batch, tap the Payments button at the top left of the screen.
10. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

27.3.2 Approving Payment Batches Using a Mobile Tablet Application

To approve payment batches:

1. Open the application by tapping the Payment Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Payment Batch Approval home screen, you can view the list of payment batches that are currently awaiting approval.

2. Tap the batch that you want to approve. The system displays the Payment Journal Review screen.
3. Tap the Approve button at the top of the screen.
4. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

Note: If you are not authorized to approve batches, the system displays an error message when you tap the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed in the list.

5. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

27.4 Using the Payment Batch Approvals Mobile Smartphone Application (M04131)

The Payment Batch Approvals smartphone application enables you to review payment batches that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download the application from the application store and install it on your device.

To open the application, tap the Payment Appr icon and log in.

27.4.1 Reviewing Payment Batches Using a Mobile Smartphone Application

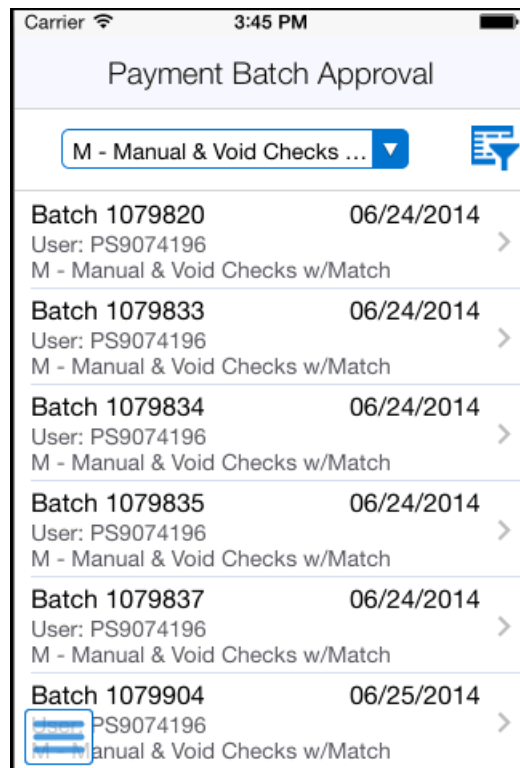
To review batches of payments using a smartphone:

1. Open the application by tapping the Payment Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Payment Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 27–4 Payment Batch Approval Home Screen: Smartphone



- To refine the list of batches displayed, tap the Filter button at the top of the pane. You can filter the batches by:

- Batch Date
- User ID
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

- In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of batches that are displayed based on your filter values
- Saves the filter values that you entered

The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of batches associated with the last saved filter values, if applicable

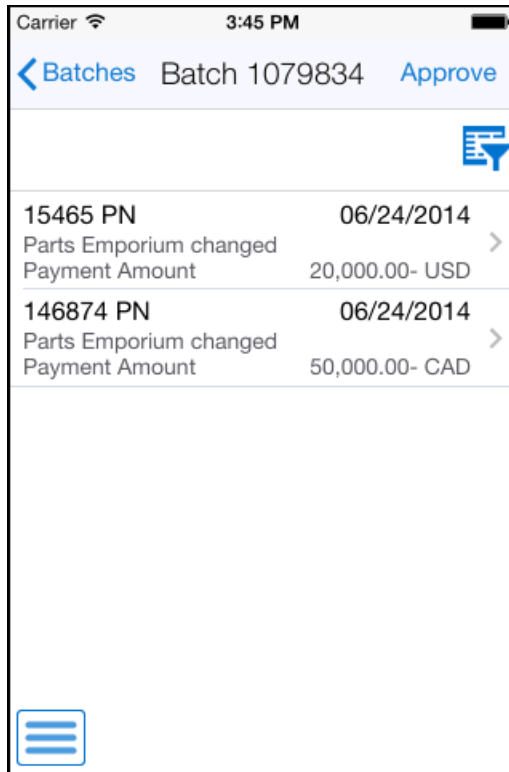
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

4. To review a batch, tap the batch from the list of batches.

The system displays a list of payments associated with the batch. For a payment that involves foreign amounts, the foreign amount and the foreign currency is displayed in the list.

Figure 27-5 List of Payments in a Batch: Smartphone



5. To refine the list of payments displayed, tap the Filter button at the top of the left pane. You can filter payments by:

- Payment Number
- Payment Type
- Currency Code
- G/L Date

6. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays vouchers based on your filter values.

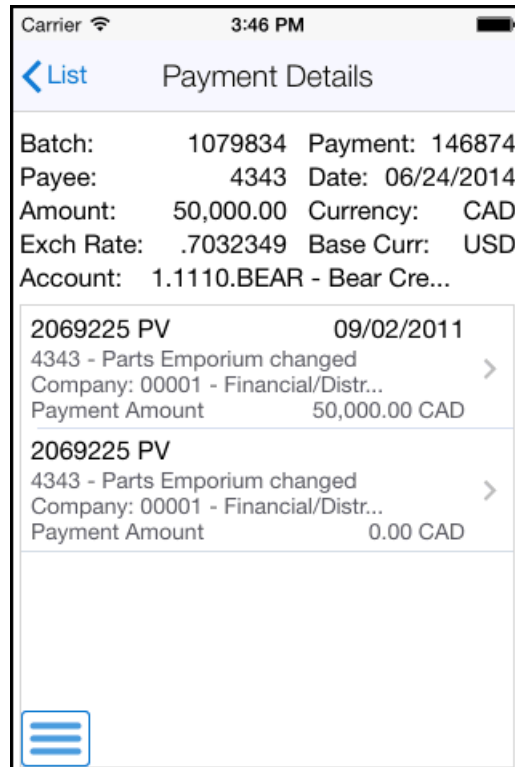
To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

7. To review the details of a payment, tap the payment from the list.

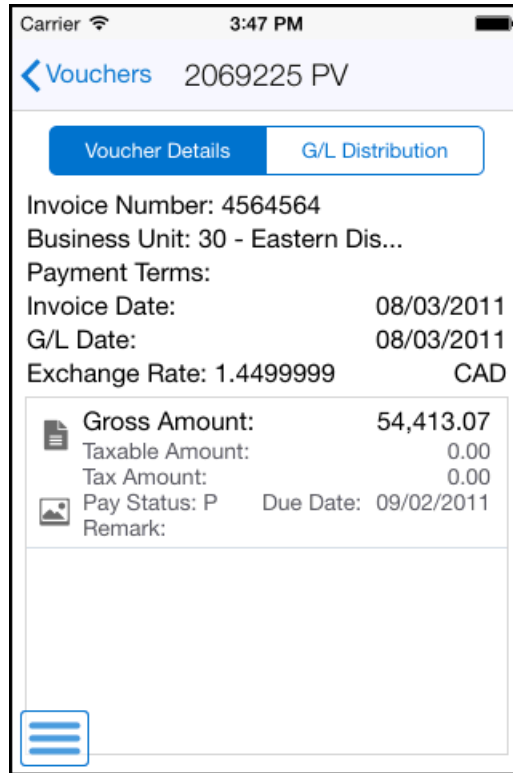
The system takes you to the Payment Details screen, which displays the list of vouchers associated with the payment. In the header, the system displays the payment details, such as batch number, payment document number, payee, payment date, payment amount, base currency, and account number. If the payment involves foreign amounts, the exchange rate and currency is also displayed.

Figure 27–6 Payment Details Screen: Smartphone



To return to the list of payments, tap the List button at the top of the screen.

8. To review line-level information of a voucher in the payment, tap the voucher. The system displays the Voucher Details screen.

Figure 27–7 Payment Details - Voucher Details Screen: Smartphone

In the Voucher Details tab, you can:

- Review the voucher header information, such as invoice number, business unit, payment terms, invoice date, G/L date, and exchange rate and currency (if it is a foreign transaction).
- Review line-specific information, such as gross amount, taxable amount, tax amount details, pay status, due date, and remarks associated with the line.
- Review text and photo attachments associated with a voucher line. Tap the first button on the left of the line to open the text attachments. The system retrieves the text attachments from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to a voucher line, tap the button below the text attachment button. The system displays the photos in a different screen with a list of photos in the left pane, and the first photo in the list, in the right pane.

When there are no image and text attachments associated with the voucher entry, the buttons are disabled.

9. To review general ledger distribution information, tap the G/L Distribution tab. You can review header information, such as the supplier address, amount to distribute, G/L date, and the exchange rate and currency (if it is a foreign transaction).

Below the header information, you can review line-level details of how the invoice amount is distributed to multiple accounts. You can tap on the text and image buttons to view text and image attachments.

10. To return to the list of vouchers in the payment, tap the Vouchers button at the top left of the screen.

11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

27.4.2 Approving Payment Batches Using a Mobile Smartphone

To approve payment batches:

1. Open the application by tapping the Payment Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Payment Batch Approval home screen, you can view the list of payment batches that are currently awaiting approval.

2. Tap the batch that you want to approve. The system displays the list of payments in the selected batch.
3. Tap the Approve button at the top of the screen.
4. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

Note: If you are not authorized to approve batches, the system displays an error message when you tap the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed in the list.

5. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Receipt Batch Approvals Mobile Applications

This chapter discusses these topics:

- [Section 28.1, "Receipt Batch Approvals Mobile Applications Overview"](#)
- [Section 28.2, "Setting Up the Receipt Batch Approvals Mobile Applications"](#)
- [Section 28.3, "Using the Receipt Batch Approvals Mobile Tablet Application \(M03B01\)"](#)
- [Section 28.4, "Using the Receipt Batch Approvals Mobile Smartphone Application \(M03B02\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Working with Batches" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.
-
-

28.1 Receipt Batch Approvals Mobile Applications Overview

You use the Receipt Batch Approvals mobile applications to review and approve batches of receipts on a mobile device.

The Receipt Batch Approvals mobile applications give you the ability to:

- Review all receipt batches that are in pending status.
- Review receipts in a batch.
- Review line-level information for a receipt.
- Approve a receipt batch.
- Review text and photos attachments associated with each receipt.

This table lists the applications that are available to review and approve receipt batches:

Type of Application	Additional Information
Base EnterpriseOne application	Use the Work With Batches program (P0011) in the JD Edwards EnterpriseOne system to review and approve receipt batches.
Tablet application	Receipt Batch Approvals (M03B01) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Receipt Batch Approvals
Smartphone application	Receipt Batch Approvals (M03B02) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Receipt Batch Approvals

Before using the Receipt Batch Approvals tablet or smartphone application, you must perform the following setup tasks:

- Activate batch security, and set up secured users and approvers.
- Set up the processing options for the mobile applications.
- Verify the processing options for the base EnterpriseOne application.

28.1.1 Differences and Limitations: Receipt Batch Approvals

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Batches Available for Review

The Receipt Batch Approvals mobile applications are set up to process and display only those receipt batches that are in pending status. However, in the base EnterpriseOne application, you can review batches of any status.

Revising Batch Information and Batch Status

Using the Receipt Batch Approvals mobile applications, you can review batches of receipts, and details of the receipts. You cannot revise existing receipt information or add receipts to a batch. However, in the base EnterpriseOne system, you can review and revise transaction details for a receipt and also add receipts to a receipt batch.

The Receipt Batch Approvals mobile applications do not provide the option of reverting the status of a batch from approved to pending. However, in the base EnterpriseOne application, you can revert the status of a batch from approved to pending if a batch needs further analysis.

Text and Image Attachment Functionality

Using the Receipt Batch Approvals mobile applications, you can review text and image attachments associated with receipts. You cannot revise existing attachments or add new attachments. However, in the base EnterpriseOne system, you can review and revise existing attachments, and also add new attachments.

28.2 Setting Up the Receipt Batch Approvals Mobile Applications

Before you use the Receipt Batch Approvals mobile applications (M03B01 and M03B02), you must complete the following setup:

- Activate batch security and set up secured users and approved users.

Secured users can only review batch information and are restricted from approving batches. Approved users can review and approve batches for secured users.

See "Setting Up Approved and Secured Users" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

- Set up the processing options for the Receipt Batch Approvals mobile applications (M03B01 and M03B02) in the JD Edwards EnterpriseOne system.
- Verify that the version of P0011 that you specify in the processing options of the tablet and smartphone applications is set up with the appropriate value in the Batch Type processing options. The P0011 program must include the receipt batch type for these mobile applications to function properly.

See "Setting Processing Options for Batches (P0011)" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

28.2.1 Setting Processing Options for the Receipt Batch Approvals Tablet Application (M03B01)

You use processing options to specify default processing information for a program.

28.2.1.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify which version of the Work With Batches program (P0011) the system uses to display and process receipt batches. The version that you specify here must have the receipt batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0009.

2. Receipts Journal Review (P03B212) Version

Use this processing option to specify which version of the Receipts Journal Review program (P03B212) the system uses to display receipts in a batch. If you leave this processing option blank, the system uses version ZJDE0001.

3. Standard Receipts Entry (P03B102) Version

Use this processing option to specify which version of the Standard Receipt Entry program (P03B102) the system uses to display transaction details associated with a standard receipt. If you leave this processing option blank, the system uses ZJDE0001.

28.2.2 Setting Processing Options for the Receipt Batch Approvals Smartphone Application (M03B02)

You use processing options to specify default processing information for a program.

28.2.2.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify which version of the Work With Batches program (P0011) the system uses to display and process receipt batches. The version that you

specify here must have the receipt batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0009.

2. Receipts Journal Review (P03B212) Version

Use this processing option to specify which version of the Receipts Journal Review program (P03B212) the system uses to display receipts in a batch. If you leave this processing option blank, the system uses version ZJDE0001.

3. Standard Receipts Entry (P03B102) Version

Use this processing option to specify which version of the Standard Receipt Entry program (P03B102) the system uses to display transaction details associated with a standard receipt. If you leave this processing option blank, the system uses ZJDE0001.

28.3 Using the Receipt Batch Approvals Mobile Tablet Application (M03B01)

The Receipt Batch Approvals mobile application enables you to review batches of receipts that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Receipt Appr icon and log in.

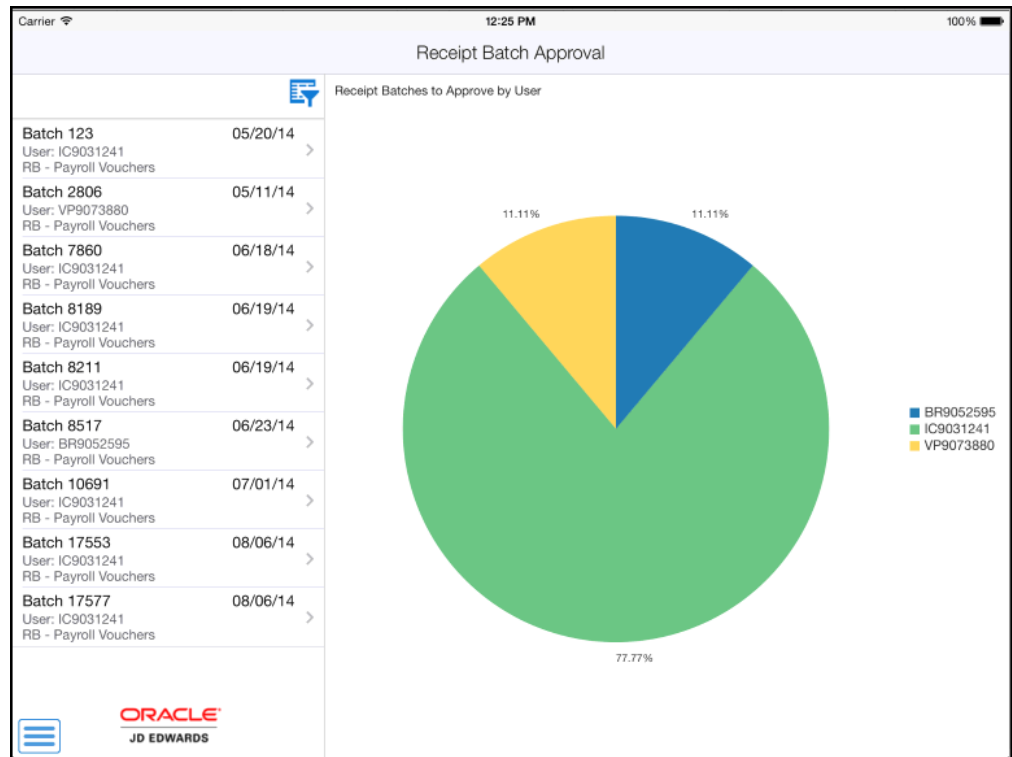
28.3.1 Reviewing Receipt Batches Awaiting Approvals Using a Mobile Tablet Application

To review batches of receipts using a tablet:

1. Open the application by tapping the Receipt Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Receipt Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 28–1 Receipt Batch Approval Home Screen - Tablet

The batches categorized by users are graphically displayed in the Receipt Batches to Approve by User section. Each colored portion of the pie chart depicts the percentage of batches awaiting approval for each user.

- To refine the list of batches displayed, tap the Filter button at the top of the left pane. You can filter the batches by:

- Batch Date
- User
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

- In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of batches that are displayed based on your filter values
- Saves the filter values that you entered

The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of batches associated with the last saved filter values, if applicable

- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields

To delete all the filter values you specified, and to enter new filter values, tap the Clear button.

4. To review a batch, tap the batch from the list of batches.
5. The system displays the Receipt Journal Review screen. The left pane has a list of receipts associated with the batch.

In the right pane, the system displays the header and the line-level details of the first receipt in three tabs: Receipt Details, Domestic Amounts, and Foreign Amounts (if the receipt is for a foreign transaction).
6. To refine the list of receipts displayed, tap the Filter button at the top of the left pane. You can filter receipts by:
 - Receipt Number
 - Receipt Date
 - Payor Number
 - Base Currency Code
7. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays receipts based on your filter values

To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all the filter values you specified, and to enter new filter values, tap the Clear button.
8. To review details of a receipt, tap the receipt in the left pane. In the Receipt Journal Review screen, the Receipt Details tab is displayed by default.

Figure 28–2 Receipt Journal Review: Receipt Details Screen - Tablet

Carrier 12:28 PM 100%

Batches Receipt Journal Review Approve

Batch 123

Receipt 201039 06/30/14

Payor: 4242-Capital System1
 Domestic Payment: 7,755.80 USD
 Foreign Payment: 1,000.0000 AED

Company: 00001 - Financial/Distribution Company G/L Date: 06/30/14
 Customer: 6031 - Eastern Distribution Center Exchange Rate: 7.7557978
 Bank Account: 1.1110.BEAR - Default Bank account
 Remark:

Document:	4585 RI 001	Payment Amount:	7,755.80
Company:	00001-Financial/Distributor	Discount Taken:	0.00
Remark:		Gross Amount:	3,620,313.34
Receipt Reference:		Due Date:	05/19/14

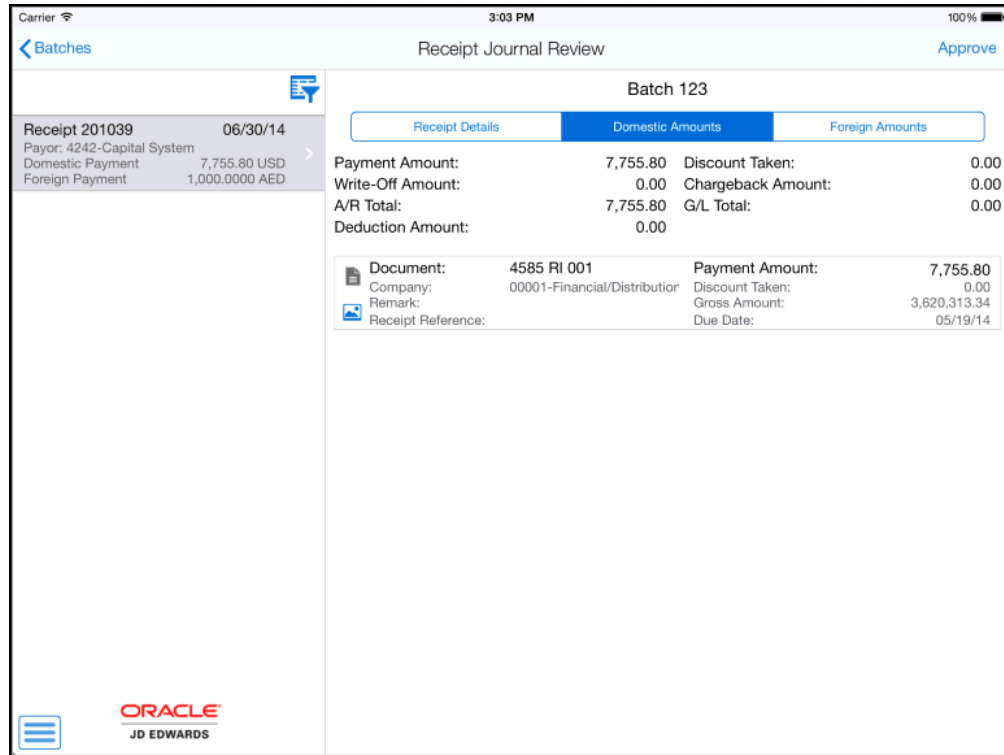
ORACLE
JD EDWARDS

On the Receipt Details tab:

- Review the header information, such as company name, customer number, bank account, G/L date, exchange rate (in case it is a foreign transaction), and remark.
- Below the header information, you can review the line-level details of the invoices that have been matched to the receipt, such as the document number, document type, company number and name, payment amount, discount taken, gross amount, due date, remark, and receipt reference details.
- Review text and photo attachments associated with a receipt entry. Tap the first button on the left of the line to open the text attachments. The system retrieves the text attachment from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to a receipt entry, tap the button below the text attachment button. The system displays the photos in a different screen with a list of photos in the left pane, and the first photo in the list, on the right pane.

When there are no image and text attachments associated with the receipt, the buttons are disabled.

9. To review domestic amount details of the receipt, tap the Domestic Amounts tab.

Figure 28–3 Receipt Journal Review: Domestic Amounts Screen - Tablet

On the Domestic Amounts tab:

- Review payment amount, write-off amount, A/R total, deduction amount, discount taken, chargeback amount, and G/L total amount.
 - Below the header information, you can review the line-level details of the invoices that have been matched to the receipt, such as the document number, document type, company name and number, payment amount, discount taken, gross amount, due date, remark, and receipt reference details.
 - Review text and photo attachments.
10. If the receipt is for a foreign transaction, the Foreign Amounts tab is also displayed. To review foreign amount details of the receipt, tap the Foreign Amounts tab.

On the Foreign Amounts tab:

- Review payment amount, write-off amount, discount taken, chargeback, and base currency amount.
 - Below the header information, you can review the line-level details of the invoices that have been matched to the receipt, such as the document number, document type, company name and number, payment amount, discount taken, gross amount, due date, remark, and receipt reference details.
 - Review text and photo attachments.
11. To return to the list of batches, tap the Batches button at the top left of the screen.
12. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

28.3.2 Approving Receipt Batches Using a Mobile Tablet Application

To approve receipt batches:

1. Open the application by tapping the Receipt Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Receipt Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

2. Tap the batch that you want to approve. The system displays the Receipt Journal Review screen.
3. Tap the Approve button at the top of the screen.
4. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

Note: If you are not authorized to approve batches, the system displays an error message when you tap the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed in the list.

5. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

28.4 Using the Receipt Batch Approvals Mobile Smartphone Application (M03B02)

The Receipt Batch Approvals smartphone application enables you to review batches of receipts that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Receipt Appr icon and log in.

28.4.1 Reviewing Receipt Batches Awaiting Approval Using a Mobile Smartphone Application

To review batches of receipts using a smartphone:

1. Open the application by tapping the Receipt Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Receipt Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 28–4 Receipt Batch Approval Home Screen - Smartphone

- To refine the list of batches displayed, tap the Filter button at the top of the pane. You can filter the batches by:

- Batch Date
- User
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

- In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of batches that are displayed based on your filter values
 - Saves the filter values that you entered

The system displays the saved filter values the next time you open the filter screen.

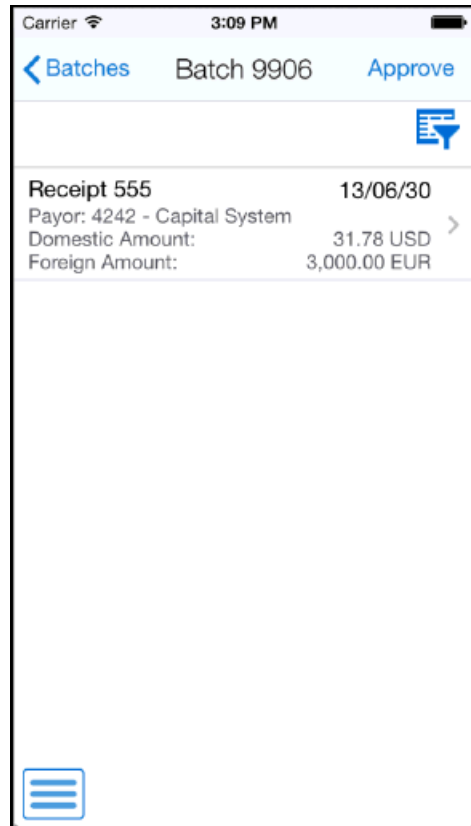
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of batches associated with the last saved filter values, if applicable
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

4. To review a batch, tap the batch from the list of batches.

Figure 28–5 List of Receipts: Smartphone



5. The system displays a list of receipts associated with the selected batch. For a receipt that involves foreign amounts, the foreign amount and foreign currency are displayed in the list.

The system displays the receipt number, receipt date, payor number, domestic amount, and foreign amount (in case of a foreign transaction) for each receipt in the batch.

6. To refine the list of receipts displayed, tap the Filter button at the top of the pane. You can filter receipts by:
 - Receipt Number
 - Receipt Date
 - Payor Number
 - Base Currency Code
7. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays receipts based on your filter values.

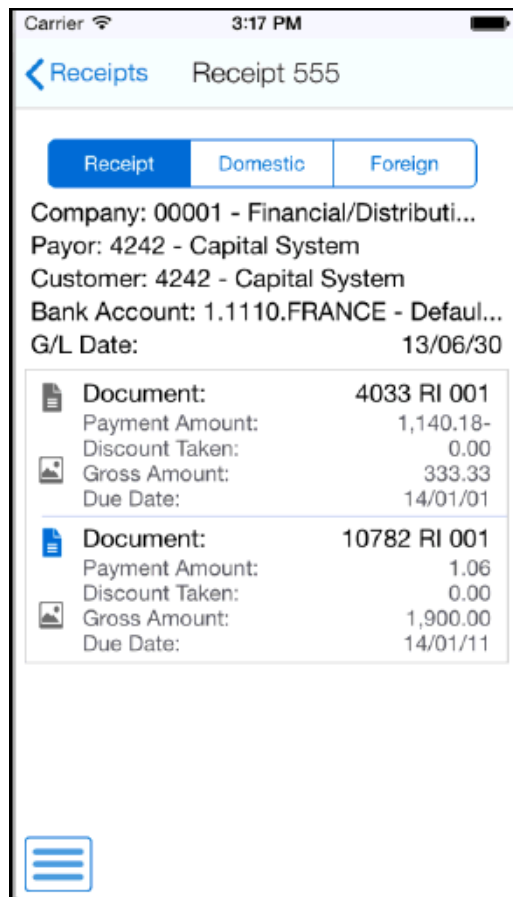
To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

8. To review details of a receipt, tap the receipt. The system displays the header and the line-level details of the receipt in three tabs: Receipt Details, Domestic Amounts, and Foreign Amounts (if the receipt is for a foreign transaction).

The Receipt Details tab is displayed by default.

Figure 28–6 Receipt Screen: Smartphone



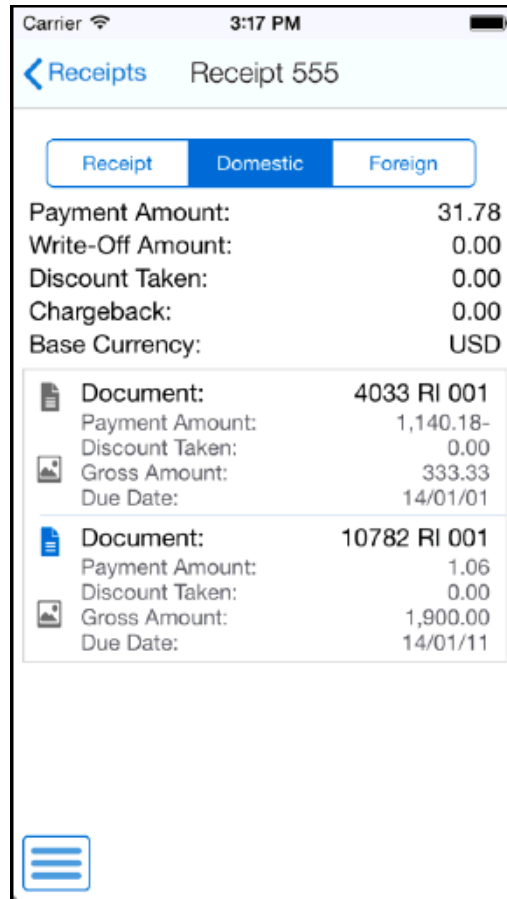
On the Receipt tab:

- Review the header information, such as company name and number, payor name, customer name and number, bank account, G/L date, and receipt date.
- Below the header information, you can review the line-level details of the invoices that have been matched to the receipt, such as the document number, document type, payment amount, discount taken, gross amount, and due date.
- Review text and photo attachments associated with a receipt entry. Tap the first button on the left of the line to open the text attachments. The system retrieves the text attachment from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to a receipt entry, tap the button below the text attachment button. The system displays the photos in a different screen with a list of photos in the left pane, and the first photo in the list, on the right pane.

When there are no image and text attachments associated with the receipt, the buttons are disabled.

9. To review domestic amount details of the receipt, tap the Domestic tab.

Figure 28–7 Domestic Details Screen: Smartphone



On the Domestic tab:

- Review payment amount, write-off amount, discount taken, chargeback, and base currency code.
 - Below the header information, you can review the line-level details of the invoices that have been matched to the receipt, such as the document number, document type, payment amount, discount taken, gross amount, and due date.
 - Review text and photo attachments.
10. If the receipt is for a foreign transaction, the Foreign tab is also displayed. To review foreign amount details of the receipt, tap the Foreign tab.

On the Foreign tab:

- Review payment amount, write-off amount, discount taken, chargeback, and exchange rate.
- Below the header information, you can review the line-level details of the invoices that have been matched to the receipt, such as the document number,

document type, payment amount, discount taken, gross amount, and due date.

- Review text and photo attachments.
11. To return to the list of receipts in the batch, tap the Receipts button at the top of the screen.
 12. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

28.4.2 Approving Receipt Batches Using a Mobile Smartphone Application

To approve receipt batches:

1. Open the application by tapping the Receipt Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

On the Receipt Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

2. Tap the batch that you want to approve. The system displays the batch details.
3. Tap the Approve button at the top of the screen.
4. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

Note: If you are not authorized to approve batches, the system displays an error message when you tap the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed in the list.

5. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Voucher Batch Approvals Mobile Applications

This chapter discusses these topics:

- [Section 29.1, "Voucher Batch Approvals Mobile Applications Overview"](#)
- [Section 29.2, "Setting Up the Voucher Batch Approvals Mobile Applications"](#)
- [Section 29.3, "Using the Voucher Batch Approvals Mobile Tablet Application"](#)
- [Section 29.4, "Using the Voucher Batch Approvals Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Working with Batches" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*
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29.1 Voucher Batch Approvals Mobile Applications Overview

You use the Voucher Batch Approvals mobile applications to review and approve batches of vouchers on a mobile device.

The Voucher Batch Approvals mobile applications give you the ability to:

- Review all voucher batches that are in pending status.
- Review vouchers in a batch.
- Review line-level information for a voucher.
- Approve a voucher batch.
- Review text attachments and photos associated with each voucher line.

This table lists the applications that are available to review and approve voucher batches:

Type of Application	Additional Information
Base EnterpriseOne application	Use the Work With Batches application (P0011) in the JD Edwards EnterpriseOne system to review and approve voucher batches.
Tablet application	Voucher Batch Approvals (M04041) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> JD Edwards Voucher Batch Approvals
Smartphone application	Voucher Batch Approvals (M04042) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> JD Edwards Voucher Batch Approvals

Before using the Voucher Batch Approvals tablet or smartphone application, you must perform the following setup tasks:

- Activate batch security, and set up secured users and approvers.
- Set up the processing options of the mobile applications.
- Verify the processing options of the base EnterpriseOne application.

29.1.1 Differences and Limitations: Voucher Batch Approvals

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Batches Available for Review

The Voucher Batch Approvals mobile applications are set up to process and display only those voucher batches that are in pending status. However, in the base EnterpriseOne application, you can review batches that are at any status.

Revising Batch Information and Batch Status

Using the Voucher Batch Approvals mobile applications, you can review batches of vouchers, and details associated with vouchers. You cannot revise existing voucher information. However, in the base EnterpriseOne system, you can review and revise voucher information.

The Voucher Batch Approvals mobile applications do not provide the option of reverting the status of a batch from approved to pending. However, in the base EnterpriseOne application, you can revert the status of a batch from approved to pending if a batch needs further analysis.

Text and Image Attachment Functionality

Using the Voucher Batch Approvals mobile applications, you can review text and image attachments associated with voucher lines. You cannot revise existing attachments or add new attachments. However, in the base EnterpriseOne system, you can review and revise existing attachments, and also add new attachments.

29.2 Setting Up the Voucher Batch Approvals Mobile Applications

Before you use the Voucher Batch Approvals mobile applications (M04041 and M04042), you must complete the following setups:

- Activate batch security, and set up secured users and approved users.
Secured users can only review batch information and are restricted from approving batches. Approved users can approve batches for secured users.
See "Setting Up Approved and Secured Users" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*
- Set up the processing options for the Voucher Batch Approvals mobile applications (M04041 and M04042) in the JD Edwards EnterpriseOne system.
- Verify that the version of the Work With Batches program (P0011) that you specify in the processing options of the tablet and smartphone applications is set up with the appropriate value in the Batch Type processing options. The Work With Batches program must include the voucher batch type for these mobile applications to function properly.
See "Setting Processing Options for Batches (P0011)" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

29.2.1 Setting Processing Options for the Voucher Batch Approvals Tablet Application (M04041)

You use processing options to specify default processing information for a program.

29.2.1.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify the version of the Work With Batches program (P0011) that the system uses to display and process voucher batches. The version that you specify here must have the voucher batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0002.

2. Voucher Batch Journal Review (P0411B) Version

Use this processing option to specify the version of the Voucher Batch Journal Review program (P0411B) that the system uses to display voucher batch journal details. If you leave this processing option blank, the system uses ZJDE0001.

3. A/P Standard Voucher Entry (P0411) Version

Use this processing option to specify the version of the A/P Standard Voucher Entry program (P0411) the system uses to display payments details for a voucher. If you leave this processing option blank, the system uses ZJDE0001.

29.2.2 Setting Processing Options for the Voucher Batch Approvals Smartphone Application (M04042)

You use processing options to specify default processing information for a program.

29.2.2.1 Versions

1. Work With Batches (P0011) Version

Use this processing option to specify the version of the Work With Batches program (P0011) that the system uses to display and process voucher batches. The version that you specify here must have the voucher batch type in the Batch Type processing option. If you leave this processing option blank, the system uses ZJDE0002.

2. Voucher Batch Journal Review (P0411B) Version

Use this processing option to specify the version of the Voucher Batch Journal Review program (P0411B) that the system uses to display voucher batch journal details. If you leave this processing option blank, the system uses ZJDE0001.

3. A/P Standard Voucher Entry (P0411) Version

Use this processing option to specify the version of the A/P Standard Voucher Entry program (P0411) the system uses to display payments details for a voucher. If you leave this processing option blank, the system uses ZJDE0001.

29.3 Using the Voucher Batch Approvals Mobile Tablet Application

The Voucher Batch Approvals tablet application enables you to review batches of vouchers that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Voucher Appr icon and log in.

29.3.1 Reviewing Voucher Batches Using a Mobile Tablet

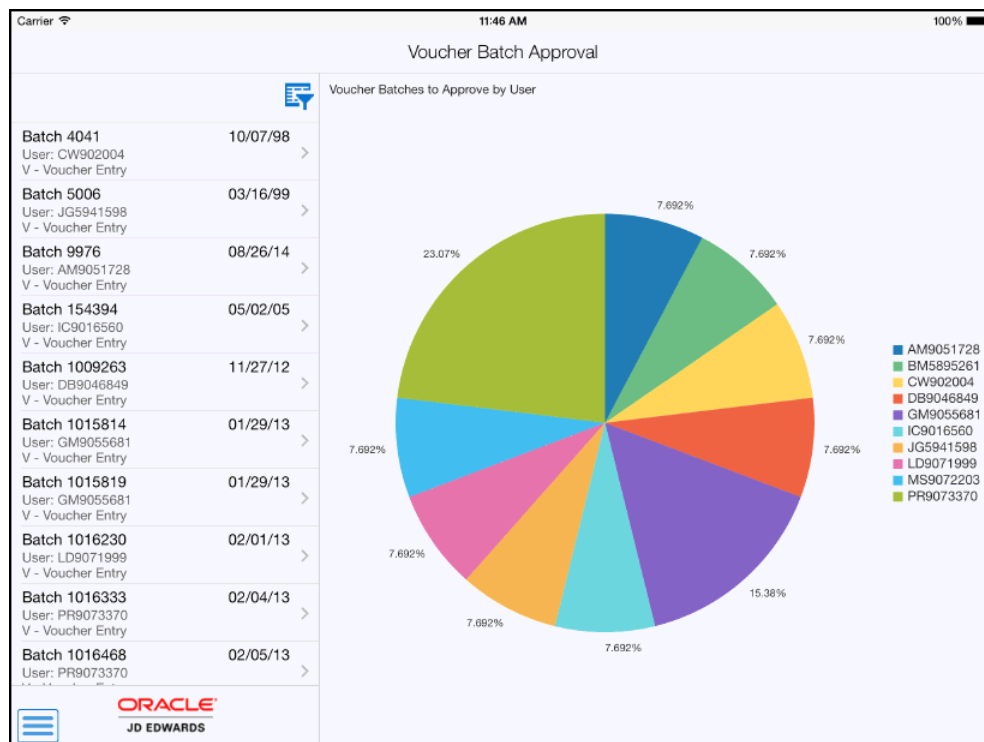
To review voucher batches using a mobile tablet:

1. Open the application by tapping the Voucher Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Voucher Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 29–1 Voucher Batch Approval Home Screen: Tablet



The batches are categorized by users, and are graphically displayed in the Voucher Batches to Approve by User section. Each colored portion of the graph depicts the percentage of the batches that are yet to be approved for each user.

3. To refine the batches that appear on your screen, tap the filter icon at the top of the left pane.

You can use these fields to filter the batches:

- Batch Date
- User
- Batch Number
- Batch Type

By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of batches that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of batches associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

5. To review a batch, tap the batch from the list of batches.

Figure 29–2 Voucher Journal Review Screen: Tablet

Carrier 1:55 PM 100%

< Batches Voucher Journal Review Approve

Batch 1084238

Voucher Details G/L Distribution

1 P4	08/25/14	Parts Emporium changed Company: 00001 - Financial/Distr... Domestic Amount: 2,269.00 USD
1 PH	08/22/14	Parts Emporium changed Company: 00001 - Financial/Distr... Domestic Amount: 8,000.00 USD Foreign Amount: 10,000.00 CAD
705 PV	08/14/14	EU Tax Area: Ctry=BE, with Tax Id Company: 11128 - EU VAT - Consta... Domestic Amount: 207,975.01 EUR Foreign Amount: 277,300.00 USD
706 PV	08/14/14	EU Tax Area: Ctry=BE, with Tax Id Company: 11128 - EU VAT - Consta... Domestic Amount: 12,100.48 EUR
51019 PV	08/01/14	Parts Emporium changed Company: 00001 - Financial/Distr... Domestic Amount: 5,280.00 EUR

Invoice Number: 3615836 Service/Tax Date: 08/25/14
Exchange Rate: 0.0000000 Invoice Date: 08/25/14
Payment Terms: G/L Date: 08/25/14
Business Unit: 1 - Financial/Distribution Company

Tax Rate Area: DEN	Tax Ex: S	Gross Amount: 1,969.00
Due Date: 08/25/14	Pay Status: A	Taxable Amount: 1,835.04
Remark: construction work at office		Tax Amount: 133.96
Tax Rate Area: DEN	Tax Ex: S	Gross Amount: 100.00
Due Date: 08/25/14	Pay Status: A	Taxable Amount: 93.20
Remark: miscellaneous supplies		Tax Amount: 6.80
Tax Rate Area: DEN	Tax Ex: S	Gross Amount: 200.00
Due Date: 08/25/14	Pay Status: A	Taxable Amount: 186.39
Remark: lunch for crew		Tax Amount: 13.61

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6. The system takes you to the Voucher Journal Review screen that has a list of vouchers associated with the batch. For a voucher that involves foreign amounts, the foreign amount and the foreign currency is displayed in the list. In the right pane, the Voucher Details tab is open by default, and the system displays header information and line-level details of the first voucher in the list.
7. To refine the vouchers that appear on your screen, tap the filter icon at the top of the left pane.

You can use these fields to filter the vouchers:

 - Voucher Number
 - Voucher Company
 - Voucher Type
 - Currency Code
 - G/L Date
8. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays vouchers based on your filter values.

To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

9. To review details of a different voucher, tap the voucher. The selected voucher is highlighted in the voucher list. In the Voucher Details tab on the right pane, you can:

- Review the voucher header information, such as invoice number, service/tax date, exchange rate, invoice date, G/L date, payment terms, and business unit.
 - Review line-specific information, such as the tax rate/area, tax explanation code, pay status, due date, gross amount, taxable amount, tax amount details, and remarks associated with the line.
 - To review text attachments associated with a voucher line, tap the top icon on the left of the line. The system retrieves the text attachment from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to a voucher line, tap the icon below the text attachment icon. The system displays the photos screen with a list of photos in the left pane, and the first photo in the list on the right pane.

When there are no image and text attachments associated with the journal entry line, the icons are disabled.
10. To review general ledger distribution information, tap the G/L Distribution tab. You can review header information, such as the supplier address, amount to distribute, explanation, exchange rate, and G/L date.

Below the header information, you can review line-level details of how the invoice amount is distributed to multiple accounts. You can tap on the text and image icons to view text and image attachments.
11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

29.3.2 Approving Voucher Batches Using a Mobile Tablet

Complete the following actions to approve voucher batches:

1. Open the application by tapping the Voucher Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Voucher Batch Approval home screen, you can view the list of batches that are currently awaiting approval.
3. Tap the batch that you want to approve. The system takes you to the Voucher Journal Review screen.
4. To approve the batch, tap the Approve button.
5. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

If you are not an approver, the system displays an error message when you select the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed.
6. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

29.4 Using the Voucher Batch Approvals Mobile Smartphone Application

The Voucher Batch Approvals smartphone application enables you to review batches of vouchers that are pending approval, and approve them from your mobile device.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Voucher Appr icon and log in.

29.4.1 Reviewing Voucher Batches Using a Mobile Smartphone

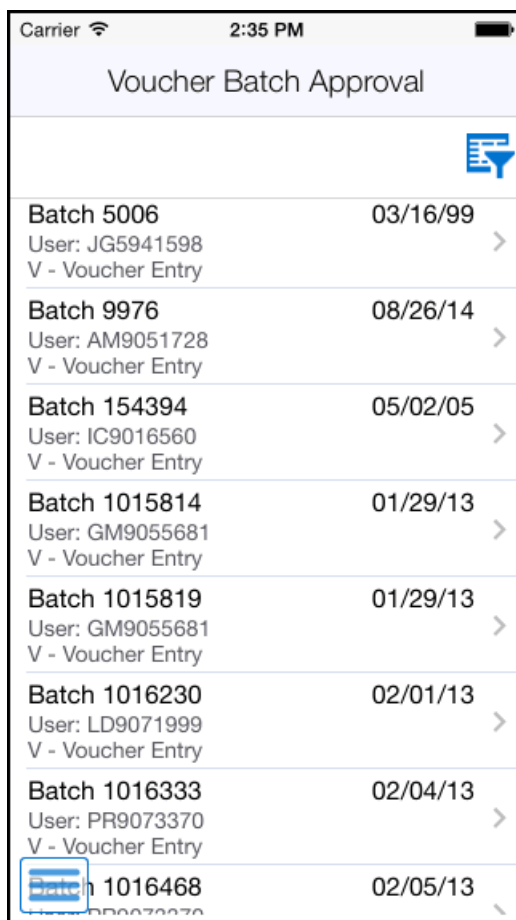
To review voucher batches using a mobile smartphone:

1. Open the application by tapping the Voucher Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Voucher Batch Approval home screen, you can view the list of batches that are currently awaiting approval.

Figure 29–3 Voucher Batch Approval Home Screen: Smartphone



3. To refine the batches that appear on your screen, tap the filter icon at the top right of the screen.

You can use these fields to filter the batches:

- Batch Date
- User
- Batch Number

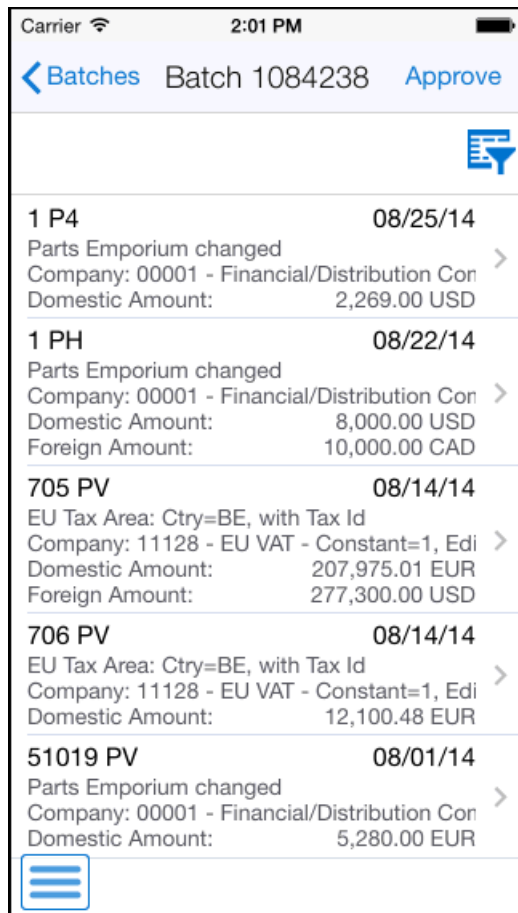
- Batch Type
 By default, the system populates this filter field with the batch type specified in the Batch Type processing option of the version of the Work With Batches program (P0011) that you use for the mobile application.
4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of batches that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

 - Takes you to the list of batches associated with the last saved filter values, if applicable.
 - Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.
 5. To review a batch, tap the batch from the list of batches.

Figure 29–4 List of Vouchers in a Batch: Smartphone



6. The system takes you to the screen that has a list of vouchers associated with the batch. For a voucher that involves foreign amounts, the foreign amount and the foreign currency is displayed in the list.
7. To refine the vouchers that appear on your screen, tap the filter icon at the top right of your screen.

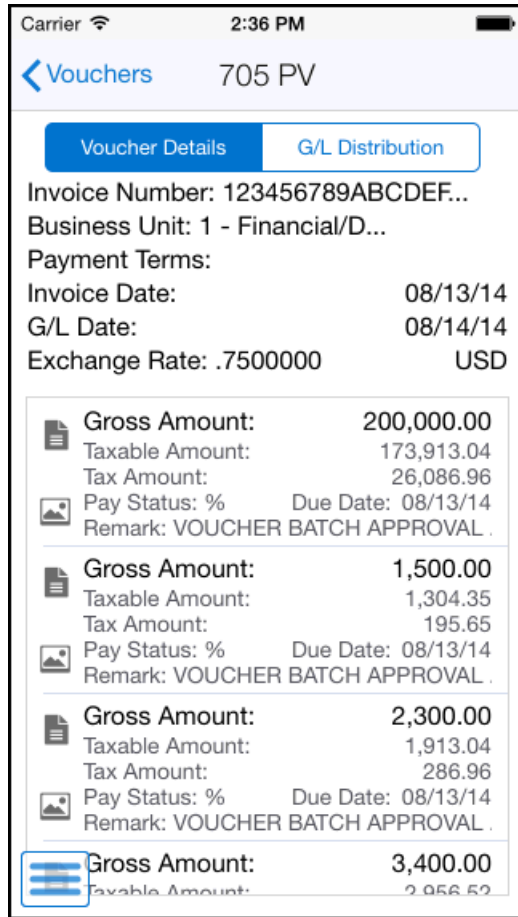
You can use these fields to filter the vouchers:

- Voucher Number
 - Voucher Company
 - Voucher Type
 - Currency Code
 - G/L Date
8. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system displays vouchers based on your filter values.

To discontinue the use of filter values, and to close the filter screen, tap the Cancel button.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

9. To view line-level information of a voucher, tap the voucher.

Figure 29–5 Voucher Details Screen: Smartphone

The system displays the Voucher Details screen, and you can:

- Review the voucher header information, such as invoice number and date, exchange rate (if it is a foreign transaction), G/L date, payment terms, and business unit.
- Review line-specific information, such as the gross amount, taxable amount, tax amount details, pay status, due date, and remarks associated with the line.
- To review text attachments associated with the voucher line, tap the top icon on the left of the line. The system retrieves the text attachment from the base EnterpriseOne system and displays the texts in a different screen. To view photos attached to a voucher line, tap the icon below the text attachment icon. The system displays the photos screen with a list of photos in the left pane, and the first photo in the list on the right pane.

When there are no image and text attachments associated with the voucher line, the icons are disabled.

10. To review general ledger distribution information, tap the G/L Distribution tab. You can review header information, such as the supplier address, tax rate/area, amount to distribute, exchange rate, and G/L date.

Below the header information, you can review line-level details of how the invoice amount is distributed to multiple accounts. You can tap on the text and image icons to view text and image attachments.

11. To go back to the list of vouchers, tap the Vouchers button at the top left of the screen.
12. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

29.4.2 Approving Voucher Batches Using a Mobile Smartphone

Complete the following actions to approve voucher batches:

1. Open the application by tapping the Voucher Appr icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Voucher Batch Approval home screen, you can view the list of batches that are currently awaiting approval.
3. Tap the batch that you want to approve. The system takes you to the screen that has a list of vouchers.
4. To approve the batch, tap the Approve button.
5. On the Confirm Approval screen, tap the Approve button to approve the batch. Note that you can also click Cancel if you do not want to proceed.

If you are not an approver, the system displays an error message when you select the Approve button.

After approving a batch, the system returns you to the home screen. Notice that the batch you approved is no longer displayed.

6. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Part IV

Health and Safety Management

This part contains these chapters:

- [Chapter 30, "Incident Scoreboard Mobile Applications"](#)
- [Section 31, "Report an Incident Mobile Applications"](#)

Incident Scoreboard Mobile Applications

This chapter discusses these topics:

- [Section 30.1, "Incident Scoreboard Overview"](#)
- [Section 30.2, "Using the Scoreboard Mobile Tablet Application"](#)
- [Section 30.3, "Using the Scoreboard Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- One View Reporting for Health and Safety Incident Management (Release 9.1 Update) in the JD Edwards EnterpriseOne Applications One View Reporting User Guide
 - Introduction to JD Edwards EnterpriseOne Health and Safety Incident Management in the JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide
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30.1 Incident Scoreboard Overview

You use the Scoreboard mobile applications to easily view the number of health and safety incidents that occurred over a specific period of time. The applications provide overall incident counts, along with incident counts by category. You can view the incidents by category, and view the detailed information associated with each incident.

Note: The Scoreboard provides you with counts for total incidents, and for each incident category. Note that the total incident count might vary from the combined total of the category counts, as some incidents are counted under multiple categories. For example, if an incident was considered an injury/illness incident and an equipment incident, the incident would appear under both of those categories, but would appear only once in the total incident count.

This table lists the applications that are available to review health and safety incidents:

Type of Application	Additional Information
Base EnterpriseOne Application	<p>Use these applications in the JD Edwards EnterpriseOne system to review health and safety incident information:</p> <ul style="list-style-type: none"> ■ Incident Master (P54HS00) ■ Incident Portlet (P54HSPT) <p>Note that this program is not accessible to users. This program is used to run the EnterpriseOne Health and Safety Portal page which displays Days Since Last Incident and Days Since Last Reportable Incident.</p> <ul style="list-style-type: none"> ■ One View Incident Summary Inquiry (P54HS220) ■ One View Incident People Inquiry (P54HS230) ■ One View Incident Equipment Inquiry (P54HS240)
Tablet Application	<p>Scoreboard (M54HS41)</p> <p>To download the tablet application to your device, search on this text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Scoreboard
Smartphone Application	<p>Scoreboard (M54HS40)</p> <p>To download the smartphone application to your device, search on this text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Scoreboard

30.1.1 Differences and Limitations: Scoreboard Search Results

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, the mobile applications provide a subset of the functionality available in the base software.

When using the Scoreboard mobile applications, be aware that the search functionality in the mobile applications is hard-coded with search filters, as described in the following table. These hard-coded search filters might cause your search results to appear differently in the mobile applications compared to the base applications.

Incident Category	Hard-Coded Search Filters
All Incidents	<p>Incidents that are marked as potential incidents or excludable incidents are not included in any of the incident counts displayed on the mobile applications.</p> <p>This applies to all of the incident counts displayed in these mobile applications.</p>
Injury/Illness	<p>Only those incidents with the Injury/Illness checkbox selected on the Incident Master are included in the Injury/Illness counts.</p>
Environment	<p>Only those incidents with the Environmental Impact checkbox selected on the Incident Master are included in the Environment counts.</p>

Incident Category	Hard-Coded Search Filters
Equipment	<p>Only incidents that include damaged, company-owned equipment are included in the Equipment incident counts. Equipment incidents with damaged third-party equipment do not appear in the Equipment incident counts.</p> <p>The system uses the attributes indicated on the equipment records associated with an incident to determine whether to include them in the count.</p> <p>Additionally, any incident that meets the criteria counts as 1 toward the incident count regardless of how many equipment records exist for the incident.</p>
Reportable	<p>Only those incidents with a Y value in the OSHA field are included in the Reportable incident count.</p> <p>Additionally, in the base application a record exists for each person involved in a reportable incident. Each of these records has the same incident number. In the mobile applications, these records are summarized into one incident, by incident number, and appear only once in the Reportable Incident count.</p>

30.2 Using the Scoreboard Mobile Tablet Application

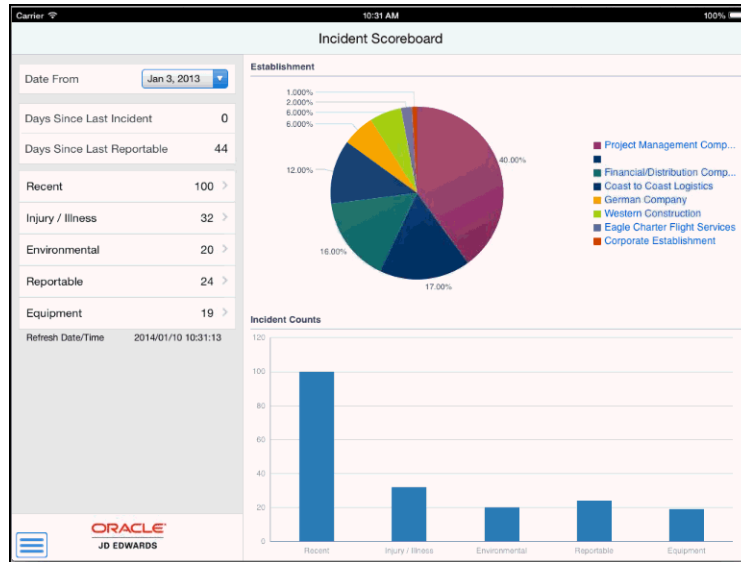
The Scoreboard tablet application (M54HS41) enables users to view summarized lists of incidents by date range, review lists of incidents by category, and view detailed information about each incident on a mobile tablet.

Before you can use the application, you must download and install the application from the application store on your device.

30.2.1 Reviewing Incidents Using the Scoreboard Mobile Tablet Application

To review health and safety incidents:

1. Open the application by tapping the icon on your device, and log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Incident Scoreboard home screen, review the current incident data. To refresh the data on the screen, swipe down on the panel with the list of incident counts to refresh the counts.

Figure 30–1 Incident Scoreboard: Home**Date From**

This field uses the default date of one week prior to the system date. Upon entry, the system displays incident counts and data based on this date. You can change the date by tapping the date drop down menu and selecting a different date. Upon selecting a different date, the system updates the incident counts and data.

Days Since Last Incident

This field displays the number of days since the last incident of any kind occurred.

Days Since Last Reportable

This field displays the number of days since the last reportable incident. Because all incidents are not reportable, this value, and the value in the Days Since Last Incident field might vary.

An incident is reportable if at least one of the associated people records on the incident is marked as reportable.

Incident Category Fields

These fields list the number of incidents by category since the selected date. The top item, Recent, includes all incidents that occurred since the specific date. The other fields in this section include the number of incidents in that specific category that occurred since the specified date.

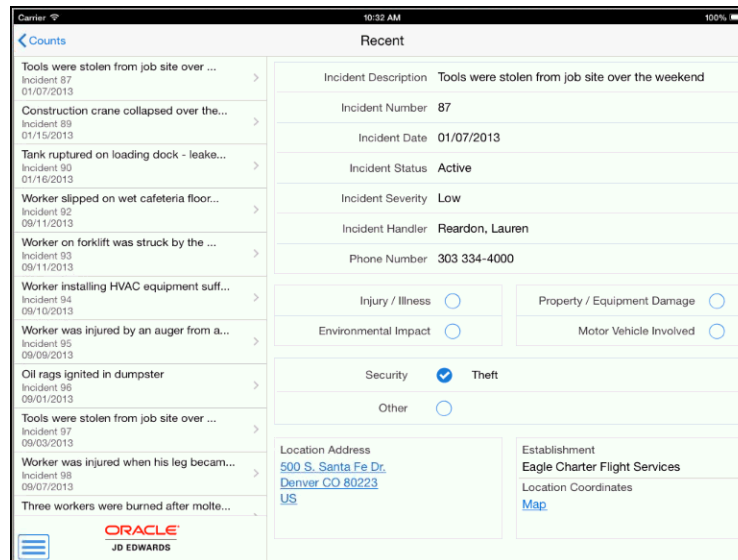
Note that the incident counts displayed in these fields are also graphically displayed in the Incident Counts section on the right side of the screen.

To review details about any of these incidents, tap the field or the bar in the graph that coincides with the incidents you want to view.

Establishment

This graph displays the establishments where the incidents occurred.

3. Tap any of the incident category fields on the left pane, segments in the Establishment pie chart, or the bars in the Incident Counts graph to display a list of incidents in that category.

Figure 30–2 Recent: Tablet

The first incident in the list is displayed in the right pane of the screen.

4. To review details about a different incident, tap the incident. The selected incident is highlighted in the incident list.
5. Tap the data in the Location Address section, or the Map link in the Location Coordinates section, to use the device's map and navigational features.
6. To return to the previous screen, tap the Counts button.
7. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

30.3 Using the Scoreboard Mobile Smartphone Application

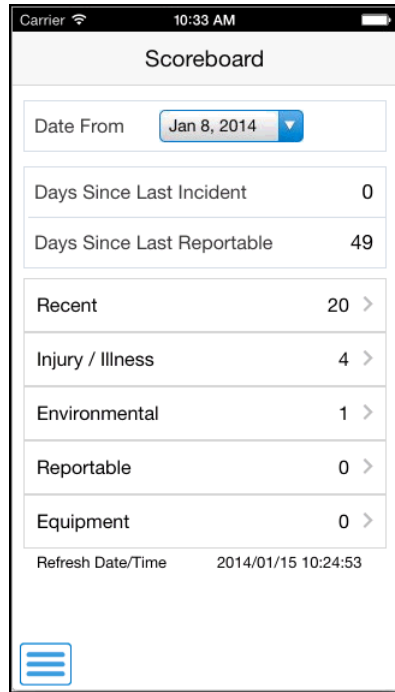
The Scoreboard smartphone application (M54HS40) enables users to view summarized lists of incidents by date range, review lists of incidents by category, and view detailed information about each incident on a mobile smartphone.

Before you can use the application, you must download and install the application from the application store on your device.

30.3.1 Reviewing Incidents Using the Incident Scoreboard Mobile Smartphone Application

To review health and safety incidents:

1. Open the application by tapping the icon on your device, and log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Scoreboard screen, review recent incident data. To refresh the data on the screen, swipe down on the panel with the list of incident counts to refresh the counts.

Figure 30–3 Incident Scoreboard: Smartphone**Date From**

This field uses the default date of one week prior to the system date. Upon entry, the system displays incident counts and data based on this date. You can change the date by tapping the date drop down menu and selecting a different date. Upon selecting a different date, the system updates the incident counts and data.

Days Since Last Incident

This field displays the number of days since the last incident of any kind occurred.

Days Since Last Reportable

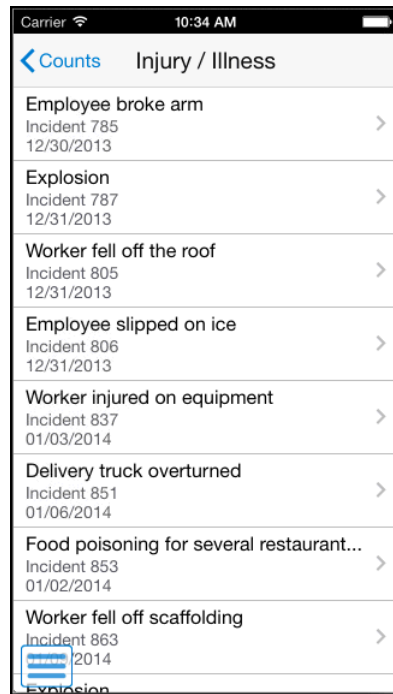
This field displays the number of days since the last reportable incident. Because all incidents are not reportable, this value, and the value in the Days Since Last Incident field might vary.

An incident is reportable if at least one of the associated people records on the incident is marked as reportable.

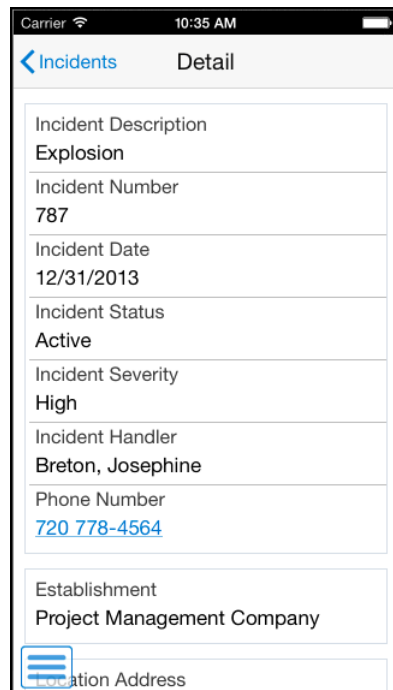
Incident Category fields

These fields list the number of incidents by category that have occurred since the selected date. The top item, Recent, includes all incidents that occurred since the specified date. The other fields include the number of incidents in that specific category that have occurred since the specified date.

3. To review details about any of these incidents, tap the category you want to view. The application displays a list of incidents in that category.

Figure 30–4 Injury/Illness: Smartphone

- To review details about a specific incident, tap the incident.

Figure 30–5 Detail: Smartphone

- Tap the phone number to call the incident handler. Tap the data in the Location Address section or the Map link in the Location Coordinates section to use the map or navigational features of your device.
- To return to the previous screen, tap the Incidents button.

7. To return to the previous screen, tap the Counts button.
8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Report an Incident Mobile Applications

This chapter discusses these topics:

- [Section 31.1, "Report an Incident Mobile Applications Overview"](#)
- [Section 31.2, "Setting Up the Report an Incident Mobile Applications"](#)
- [Section 31.3, "Using the Report an Incident Mobile Tablet Application"](#)
- [Section 31.4, "Using the Report an Incident Mobile Smartphone Application \(M54HS31\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Entering and Updating Incidents Using the Incident Master Program (P54HS00)" in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide*
 - "Entering Incidents Using the Report an Incident Program (P54HS30)" in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide*
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31.1 Report an Incident Mobile Applications Overview

You use the Report an Incident mobile applications to review incidents, and to enter new incidents. You can:

- Enter incident details, such as the description of an incident, the location where the incident occurred, the date and time of the incident, and the date and time when you report the incident. If you turned on the location setting on your mobile device, you can enable the applications to populate the location coordinates where the incident occurred.
- Attach details of the people who are involved in the incident to the incident record.
- Add photos associated with the incident and view existing photos.

This table lists the applications that are available to review and enter health and safety incidents:

Type of Application	Additional Information
Base EnterpriseOne application	To review existing incidents and to enter new incidents, use these applications in the JD Edwards EnterpriseOne system: <ul style="list-style-type: none"> ■ Incident Master program (P54HS00) ■ Report an Incident program (P54HS30)
Tablet application	Add Incident (M54HS32) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Report an Incident
Smartphone application	Add Incident (M54HS31) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Report an Incident

Before using the Report an Incident mobile applications, you must set the processing options for the Report an Incident mobile applications.

31.1.1 Differences and Limitations: Report an Incident

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The Report an Incident mobile smartphone application uses your login ID to search for incidents that you are associated with. After you launch the smartphone application, the system displays a list of your incidents that occurred seven days prior to the system date. To search for and filter incidents from your list, you can use the date filter in the application.

The Report an Incident mobile tablet application processes all incidents available in the EnterpriseOne system. After you launch the tablet application, the system displays a list of all incidents that occurred seven days prior to the system date. In the tablet application, other filters apart from the date filter are also available.

In the base EnterpriseOne Incident Master program (P54HS00), you can access all incidents. You have access to several Query By Example (QBE) fields that you can use to search and filter incidents. Therefore, your search results in the mobile applications can differ from the search results in the base application.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

31.2 Setting Up the Report an Incident Mobile Applications

Processing Options

Before you use the Report an Incident tablet and smartphone applications, you must set up the processing options of the applications in the JD Edwards EnterpriseOne system. You must also review the processing options for the Incident Master program (P54HS00) and the Report an Incident program (P54HS30) to verify that the processing options are valid when you process incident data by using the mobile device.

Location Services

You can use the device's location services to automatically display the latitude and longitude values of the location for an incident. To use the device's location services for the Report an Incident mobile applications, you must verify that the location setting in the mobile device (tablet or smartphone) is turned on.

When the location setting is turned on in the smartphone, the Report an Incident smartphone application displays a window asking if you want to enable location services. You get this window when you add a new incident using the smartphone application. After you confirm to enable location services for the application, the application displays the latitude and longitude values of the location.

When the location setting is turned on in the tablet, the Report and Incident tablet application automatically displays the latitude and longitude values of the location. The tablet application does not ask the user for a confirmation whether to enable location services.

You can turn off the location services for the applications (smartphone and tablet) if you do not want the system to populate the location coordinates of the incident location. To turn off location services for an application, you must go to the mobile device location setting, and manually turn off the location services for the application.

See:

- "Setting Processing Options for the Incident Master Program (P54HS00)" in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide*
- "Setting Processing Options for the Report an Incident Program (P54HS30)" in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide*

31.2.1 Setting Processing Options for the Report an Incident Mobile Tablet Application

You use processing options to specify default processing information for a program.

31.2.1.1 Versions

1. Incident Master (P54HS00) Version

Use this processing option to specify which version of the Incident Master program (P54HS00) the Add Incident tablet application (M54HS32) uses to display incidents. If you leave this processing option blank, the system uses ZJDE0001.

2. Report an Incident (P54HS30) Version

Use this processing option to specify which version of the Report an Incident program (P54HS30) the Add Incident tablet application (M54HS32) uses to add incidents. If you leave this processing option blank, the system uses ZJDE0001.

31.2.2 Setting Processing Options for the Report an Incident Mobile Smartphone Application

You use processing options to specify default processing information for a program.

31.2.2.1 Versions

1. Incident Master (P54HS00) Version

Use this processing option to specify which version of the Incident Master program (P54HS00) the Add Incident smartphone application (M54HS31) uses to display incidents. If you leave this processing option blank, the system uses ZJDE0001.

2. Report an Incident (P54HS30) Version

Use this processing option to specify which version of the Report an Incident program (P54HS30) the Add Incident smartphone application (M54HS31) uses to add incidents. If you leave this processing option blank, the system uses ZJDE0001.

31.3 Using the Report an Incident Mobile Tablet Application

The Report an Incident mobile tablet application enables you to review all incidents, and to enter new incidents. You can use filters to search for and filter incidents.

Before you can use the application, you must download and install the Report an Incident application from the application store on your device.

31.3.1 Entering Health and Safety Incidents Using a Mobile Tablet Application

To enter health and safety incidents:

1. Open the application by tapping the Add Incident icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Report an Incident screen, review the incidents in the list. By default, the system displays incidents that occurred one week prior to the system date.
In the right pane, the system displays the details of the incident that appear first in the list.

Figure 31–1 Report an Incident Home Screen: Tablet

The screenshot displays the 'Report an Incident' application interface. At the top, the status bar shows 'Carrier', '1:34 PM', and '100%' battery. The main header is 'Report an Incident'. Below this, there is a 'Date From' dropdown menu set to 'May 12, 2012' with a filter icon. A list of incidents is shown on the left, with the top one selected: 'Fire in the office' (Incident 454, 05/19/2014). The right pane shows details for this incident, including a tabbed interface with 'Details' selected. The details include: Incident Date and Time (05/19/2014, 07:52:02), Reported Date and Time (05/19/2014, 07:52:02), Incident Status (Default), Incident Severity (Default), Incident Handler (Parkinson, Rob), and a phone number (303 762-9810). There are also checkboxes for 'Injury / Illness' (checked), 'Property / Equipment Damage' (checked), 'Environmental Impact' (unchecked), and 'Motor Vehicle Involved' (unchecked). Below these are 'Security' (checked), 'Unauthorized Access', 'Other' (checked), and 'Fire'. At the bottom left is the Oracle JD Edwards logo, and at the bottom right is a 'Photos (1)' link.

Date From

This field uses the default date of one week prior to the system date. After you open the tablet application, the system displays incidents based on this date. You can change the date by tapping the date dropdown menu and selecting a different date. When you select a different date, the system automatically updates the incidents in the list.

3. To filter work orders, tap the filter icon next to the Date From field.

Establishment

To add an establishment to your search criteria, tap the Visual Assist icon to search for a value and return it to the Establishment field, or manually enter the establishment address book number in the field.

Business Unit

To add a business unit to your search criteria, tap the Visual Assist icon to search for a value and return it to the Business Unit field, or manually enter the address book number of the business unit in the field.

Incident Severity

To add incident severity to your search criteria, tap the Incident Severity dropdown menu and select a value that identifies the severity of the incident.

Incident Status

To add incident status to your search criteria, tap the Incident Status dropdown menu and select a status.

Incident Classification

Select the incident classification options (Injury/Illness, Environmental Impact, etc) that you want to add to your search criteria.

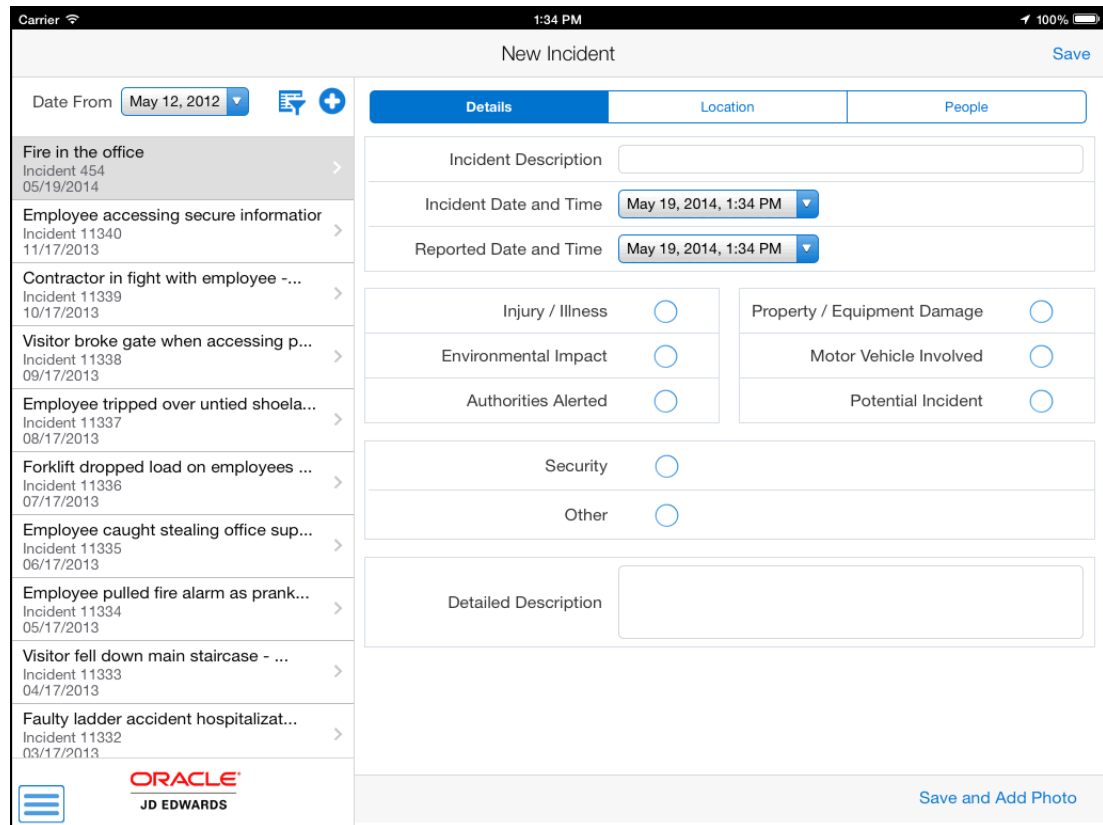
4. In the filters screen, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of incidents that are displayed based on your filter values.
 - Saves the filter values that you entered.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

 - Takes you to the list of incidents associated with the last saved filter values, if applicable.
 - Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all of the filter values that you specified, and to enter new filter values, tap the Clear button.
5. To enter a new incident, tap the add icon next to the filter icon. The system displays the New Incident screen that has three tabs: Details, Location, and People. The Details tab is open by default.

Figure 31–2 New Incident Screen: Tablet



In the Details tab, you can:

- Enter a maximum of 100 characters to describe the incident.

- Tap the Incident Date and Time, and Reported Date and Time dropdown menus to select the date and time when the incident occurred, and the date and time when the incident was reported. The application uses the system date and time as the default date and time in these fields. You can change the date and time in these fields by tapping the date dropdown menus and selecting a different date and time.
 - Select the options to indicate whether the incident caused injury or illness, resulted in any damages, had an impact on the environment, whether vehicles were involved and authorities alerted, and whether it was a potential incident.
 - Select the Security option to indicate the incident was a security issue, such as a threat or assault. When you select this option, the system displays a dropdown menu next to the option. Tap the dropdown menu and select an option to categorize the security type.
 - Select the Other option to indicate whether the incident has other attributes, such as a fire, explosion, or perhaps is being used to indicate a safety inspection. When you select this option, the system displays a dropdown menu next to the option. Tap the dropdown menu and select an option to categorize the other type.
 - Enter a detailed description of the incident. The system passes the information that you enter here as media object text attachments in the base EnterpriseOne program.
6. To add location details, tap the Location tab.

Figure 31–3 New Incident Location Screen: Tablet

The screenshot displays the 'New Incident' screen with the 'Location' tab selected. The left sidebar lists several incident entries, each with a title, incident number, and date. The main area contains a form with the following fields:

- Company:** Searchable text field.
- Project Number:** Searchable text field.
- Establishment:** Text field containing the value '2'. A dropdown arrow is visible to the right.
- Business Unit:** Searchable text field.
- Location:** Text field.
- Latitude:** Text field containing the value '37.785834'.
- Longitude:** Text field containing the value '-122.406417'.

At the bottom of the screen, the Oracle JD Edwards logo is on the left, and a 'Save and Add Photo' button is on the right.

In the Location screen, you:

- Enter the location information where the incident occurred: the company address book number, business unit, the establishment address book number, the project number, and a description of the location. You can tap the Visual Assist icon to search for and select values for fields that have the Visual Assist icon next to them, or you can manually enter the values. The system populates the values for the Company and Business Unit fields based on the logged in user, if the user is set up in the Employee Master.

The system populates the Establishment field with the value from the Establishment processing option of the Incident Master program (P54HS00), if the value is set up in the processing option. You can edit the Establishment field.

- Review or enter the latitude and longitude values of the location. If you have enabled the location setting in the tablet, the system populates the Latitude and Longitude fields with the geo-coordinates from the device. You can edit the values in these fields.

If you have not enabled the location setting in the tablet, the system does not populate the Latitude and Longitude fields. You can enter the Latitude and Longitude values manually.

7. To add details of the people involved in the incident, tap the People tab. In the People screen, tap the add icon to add a person to the incident. When you tap the add icon, the system displays the screen where you can add person information.

Figure 31–4 Person Window Displayed on People Screen: Tablet

The screenshot shows a mobile application interface. On the left, there is a list of incident records with details like 'Date From', 'Employee accessing secure informatior', 'Contractor in fight with employee -...', 'Visitor broke gate when accessing p...', 'Employee tripped over untied shoela...', 'Forklift dropped load on employees ...', 'Employee caught stealing office sup...', 'Employee pulled fire alarm as prank...', 'Visitor fell down main staircase - ...', 'Faulty ladder accident hospitalizat...', and 'Employee Car Accident Off Campus'. On the right, there is a 'Person Window' form with the following fields: 'Person ID' (with a search icon), 'Person Name' (with a search icon), 'Injury/Illness Description', 'Incident Role' (a dropdown menu showing '-- Select One --'), 'Incident Classification' (radio buttons for Employee, Injured, 3rd Party, On Premises, Contractor), and 'Shift Code' (a dropdown menu showing '-- Select One --'). The top of the screen shows 'Carrier', '4:18 PM', and '100%' battery. The bottom of the screen shows the Oracle JD Edwards logo and a 'Save and Add Photo' button.

In the person screen, you:

- Enter the address book number or the name of the person. To attach a person to the incident record, you must complete either the Person ID or the Person Name field; otherwise, the system displays an error message that neither of

the fields are complete and you cannot save the person record. Complete the Person ID field only if the person you are attaching to the incident has a valid address book number in the JD Edwards EnterpriseOne system.

If you enter a valid address book number in the Person ID field, the system populates the associated person's name in the Person Name field. If you enter an invalid address book number, the system displays an error message, and disables the Person Name field. To correct the error, you must tap the OK button in the error message. The system automatically clears the value in the Person ID field, and then you can either enter a valid address book number or leave the field blank, and complete the Person Name field instead.

- Enter a description of the injury and illness.
- Tap the Incident Role drop-down menu and select a value that identifies the role of the person in the incident.
- Select the options to indicate that the person is an employee, is injured, is a third party, was on the premises when the incident happened, or is a contractor.
- Tap the Shift Code drop-down menu and select the person's daily work shift.
- Tap the Part of Body drop-down menu and select the part of the body injured in the incident.
- Enter a description of the action taken after the incident.

To save the person detail that you entered, tap the Save button. To close the person screen without saving your entry, tap the Cancel button.

The system returns you to the New Incident People screen that has the name of the person you attached to the incident.

8. To add more people to the incident, tap the add icon and enter their details. To edit the person details you entered, tap the edit icon on the left of the person line. To delete the person record from the incident, tap the delete icon on the right of the person line.

Note: The tablet application handles privacy case, and replaces the person name with 99999999 for a person marked as a privacy case in the base EnterpriseOne system.

See "Entering and Updating Incidents Using the Incident Master Program (P54HS00)" in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide*

9. To save the incident, tap the Save button. When you tap the Save button, the system takes you to the home screen, and you can view the new incident that you entered at the top of the incident list.

If you do not save your incident record, you will lose unsaved changes, including the people entries that you saved.

10. To save the incident and to also add a photo to the incident, tap the Save and Add Photo button. The system takes you to the Photo screen. To access the Album and Camera feature of your device, tap the Add button. Tap the Album option to add a new photo to the incident from the device's photo gallery. Tap the Camera option to take a new photo by using the camera feature of your device and attach it to the incident. You can add a description of the photo.

The system saves the photos in a list.

11. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

31.3.2 Reviewing Health and Safety Incidents Using a Mobile Tablet Application

To review health and safety incidents, complete the following actions:

1. Tap the incident that you want to review from the list of incidents.
The system displays incident details, location information, and people details associated with the incident.
2. To call the incident handler for the incident, tap the phone number in the Incident Handler line.
3. To use the device's navigational feature, tap the text in the Location Address section. To use the device's map feature, tap the Map link in the Location Coordinates section.
4. To review details of people involved in the incident, tap the People tab. You cannot add or delete person for existing incidents.
5. To view photos attached to incidents, tap the Photos button. The number displayed on the Photos button represents the total number of photos related to the incident. You cannot edit or delete photos from existing incidents.

31.4 Using the Report an Incident Mobile Smartphone Application (M54HS31)

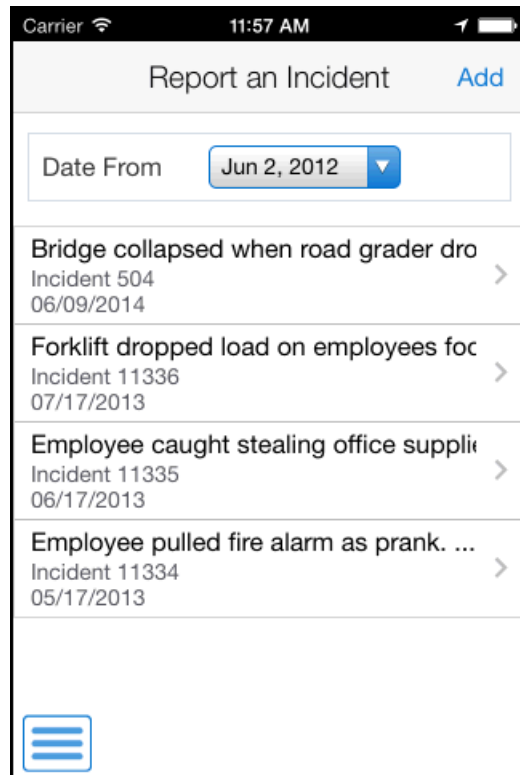
You use the Report an Incident mobile smartphone application to easily view incidents for which you are the originator, handler, or investigator, and to enter new incidents. You can enter new incidents, attach people details to incidents, add photos to incidents, and view photos attached to incidents.

Before you can use the application, you must download and install the Report an Incident application from the application store on your device.

31.4.1 Entering Health and Safety Incidents Using a Mobile Smartphone Application

To enter health and safety incidents:

1. Open the application by tapping the Add Incident icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Report an Incident screen, review the incidents in the list. By default, the system displays 25 incidents that occurred one week prior to the system date. To refresh the data on the screen, swipe down on the screen. To view more incidents, tap the Load More Rows option at the bottom of the screen.

Figure 31–5 Report an Incident Home Screen: Smartphone**Date From**

This field uses the default date of one week prior to the system date. After you enter the smartphone application, the system displays incidents based on this date. You can change the date by tapping the date dropdown menu and selecting a different date. When you select a different date, the system automatically updates the incidents in the list.

3. To enter a new incident, tap the Add button. When you tap the Add button, the system displays a window asking if you want to turn on location services to determine your location. If you confirm that you want to enable location services for the application, the application displays the latitude and longitude values of the location for an incident.

See [Section 31.2, "Setting Up the Report an Incident Mobile Applications"](#)

The system takes you to the New Incident screen that has two tabs: Details and People.

Figure 31–6 New Incident Screen: Smartphone

The screenshot shows a mobile application interface for reporting an incident. At the top, there's a status bar with 'Carrier', signal strength, Wi-Fi, and the time '11:49 AM'. Below that is a navigation bar with a back arrow, 'Cancel', 'New Incident', and 'Save'. The main content area has two tabs: 'Details' (selected) and 'People'. Under 'Details', there are four sections: 'Incident Date and Time' with a dropdown menu showing 'Jun 9, 2014, 11:49 AM'; 'Reported Date and Time' with a dropdown menu showing 'Jun 9, 2014, 11:49 AM'; 'Incident Description' with a text input field; and 'Location' with a text input field. At the bottom, there is a blue hamburger menu icon and a 'Save and Add Photo' button.

In the Details tab, you can:

- Enter the date and time when the incident occurred, and the date and time when the incident was reported. The application uses the system date and time as the default date and time in the Incident Date and Time and Reported Date and Time fields. You can change the date and time by tapping the date dropdown menu and selecting a different date and time.
- Enter a maximum of 100 characters to describe the incident, and enter the location of the incident.
- Review or enter the latitude and longitude values of the location. If you have enabled the location services for the smartphone application, the system populates the Latitude and Longitude fields with the geo-coordinates from the device. You can edit the values in these fields.

If you have not enabled the location services for the smartphone application, the system does not populate the Latitude and Longitude fields. You can enter the Latitude and Longitude values manually.

Note: If the fields at the bottom of the screen are obscured by the keyboard, you can tap the Next Field button to move to the next fields.

To add people associated with the incident, tap the People tab. In the People screen, tap the Add Person button located at the bottom of the screen. The system displays the Person screen.

Figure 31–7 Person Screen: Smartphone

In the Person screen, you:

- Enter the address book number or the name of the person. To attach a person to the incident record, you must complete either the Person ID or the Person Name field; otherwise, the system displays an error message that neither of the fields are complete and you cannot save the person record. Complete the Person ID field only if the person you are attaching to the incident has a valid address book number in the JD Edwards EnterpriseOne system.

If you enter a valid address book number in the Person ID field, the system populates the associated person's name in the Person Name field. If you enter an invalid address book number, the system displays an error message, and disables the Person Name field. To correct the error, you must tap the OK button in the error message. The system automatically clears the value in the Person ID field and you can either enter a valid address book number, or leave the field blank, and complete the Person Name field instead.

- Enter a description of the injury and illness.
- Tap the Incident Role dropdown menu and select a value that identifies the role of the person in the incident.
- Select the options to indicate that the person is an employee, is injured, is a third party, was on the premises when the incident happened, or is a contractor.

To save the person record, tap the Save button. The system returns to the New Incident People screen that has the name of the person you attached to the incident. You can add more people to the incident by tapping the Add Person button and entering their details. You can also edit person detail and delete person record before saving the incident.

Note: The smartphone application does not handle privacy case, and a person's name is displayed even if the person is marked as a privacy case in the base EnterpriseOne system.

4. To save the incident, tap the Save button. When you tap the Save button, the system takes you to the Report an Incident screen. Here, you can view the new incident that you entered at the top of the incident list.
5. To go back to the Report an Incident screen without saving your entry, tap the Cancel button. If you tap the Cancel button, the system does not save the people entries that you made.
6. To add a photo to the incident, tap the Save and Add Photo button. The system takes you to the New Photo screen. To access the Album and Camera feature of your device, tap the Add button. Tap the Album option to add a new photo to the incident from the device's photo gallery. Tap the Camera option to take a new photo by using the camera feature of your device and attach it to the incident. You can add a description of the photo.

The system saves the photos to the New Photo screen in a list.

7. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

31.4.2 Reviewing Health and Safety Incidents Using a Mobile Smartphone Application

To review health and safety incidents, complete the following actions:

1. Tap the incident that you want to review from the Report an Incident list.
The system displays the Incident screen that has the details of the incident: the incident date and time, reported date and time, incident description, location description, and latitude and longitude values of the location the incident occurred.
2. To review details of a person involved in the incident, tap the person line in the People screen. You cannot add or delete person record for existing incidents.
3. To view photos attached to incidents, tap the Photos button. The number displayed on the Photos button represents the total number of photos related to the incident. You cannot edit or delete photos from existing incidents.

Part V

Human Capital Management Fundamentals

This part contains the following chapters:

- [Chapter 32, "Contact Employee Mobile Application"](#)

Contact Employee Mobile Application

This chapter discusses these topics:

- [Section 32.1, "Contact Employee Mobile Application Overview"](#)
- [Section 32.2, "Setting Up the Contact Employee Mobile Smartphone Application"](#)
- [Section 32.3, "Using the Contact Employee Mobile Smartphone Application \(M080101\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- *Entering Organizational Assignment Information in the JD Edwards EnterpriseOne Human Capital Management Fundamentals Implementation Guide.*
 - *Setting Up Employee Information in the JD Edwards EnterpriseOne Human Capital Management Fundamentals Implementation Guide.*
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32.1 Contact Employee Mobile Application Overview

You use the Contact Employee mobile application to search for employees and view employee organization, location, and contact information. You can use filters to search for employees. The Contact Employee mobile application enables you to view an employee's photo, display a work location map, and initiate a call or compose short message service (SMS) text message.

This table lists the applications that are available to review employee information:

Type of Application	Additional Information
Base EnterpriseOne application	Use these applications in the JD Edwards EnterpriseOne system to search for and review employee information: <ul style="list-style-type: none"> ■ Employee Organizational Assignments (P0801ORG) ■ Employee Information (P0801) ■ Address Book Revisions (P01012)

Type of Application	Additional Information
Smartphone application	Contact Employee (M080101) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Contact Employee

Before using the Contact Employee mobile smartphone application, you must set the processing options for the Contact Employee application (M080101).

32.1.1 Differences and Limitations: Contact Employee

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Employee Information Displayed

The Contact Employee mobile smartphone application displays basic employee information. When you search for an employee, the application displays the employee information based on a wild card search on the alpha name of an employee. Not all the employee information available in the base software is displayed in the mobile application.

Organization Assignment Displayed

This application displays only the home company description, home business unit description, job title, manager information, and work location. Your search results in the mobile application for organization assignment can differ from the search results in the base application.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

32.2 Setting Up the Contact Employee Mobile Smartphone Application

Before you use the Contact Employee mobile smartphone application (M080101), you must set up the processing options of the application in the JD Edwards EnterpriseOne system. You use the processing options to specify the version of the Employee Organizational Assignments program (P0801ORG) that you want to use.

See Setting Processing Options for Employee Organizational Assignments program (P0801ORG) in the *JD Edwards EnterpriseOne Human Capital Management Fundamentals Implementation Guide*.

32.2.1 Setting Processing Options for the Contact Employee Mobile Smartphone Application (M080101)

You use processing options to specify default processing information for a program.

32.2.1.1 Versions

1. Employee Organizations Assignment (P0801ORG) Version

Use this processing option to specify the version of the Employee Organizational Assignments program (P0801ORG). The system uses the version of P0801ORG to retrieve employee information. If you leave this processing option blank, the system uses version ZJDE0001.

2. Address Book (P01012) Version

Use this processing option to specify the version of the Address Book program (P01012). The system uses this processing options to retrieve employee address book information. If you leave this processing option blank, the system uses version ZJDE0001.

32.2.1.2 Display

1. Work Phone Number Type

Use this processing option to specify the address book phone type for a work phone number. The system uses this processing option to display an employee's work phone number. If you leave this processing option blank, the mobile application will not display a work phone number.

2. Mobile Phone Number Type

Use this processing option to specify the address book phone type for a mobile phone number. The system uses this processing option to display an employee's mobile phone number. If you leave this processing option blank, the mobile application will not display a mobile phone number.

3. Email Address Type

Use this processing option to specify the address book electronic address type for an e-mail address. The system uses this processing option to display an employee's e-mail address. If you leave this processing option blank, the mobile application does not display an e-mail address.

4. Employee Work Location Related Address Number

Employee Work Location Related Address Number Use this processing option to specify the employee's address book related address number that you are using to store the address book number of the employee's work location. To display an employee's work location address, you must first set up work location address book records and then associate those address book numbers to the employee's Related Address Number. If you leave this processing option blank, the mobile application will not display employee work location address information.

32.3 Using the Contact Employee Mobile Smartphone Application (M080101)

Use the Contact Employee mobile smartphone application to:

- Search and view basic employee information.
- View employee address information.
- Use mapping and navigation features of your device to locate employee work locations.
- Send e-mails to or use the short message service (SMS) for an employee.

- Call employees from your device.

Before you can use the application, you must download and install the application from the application store on your device.

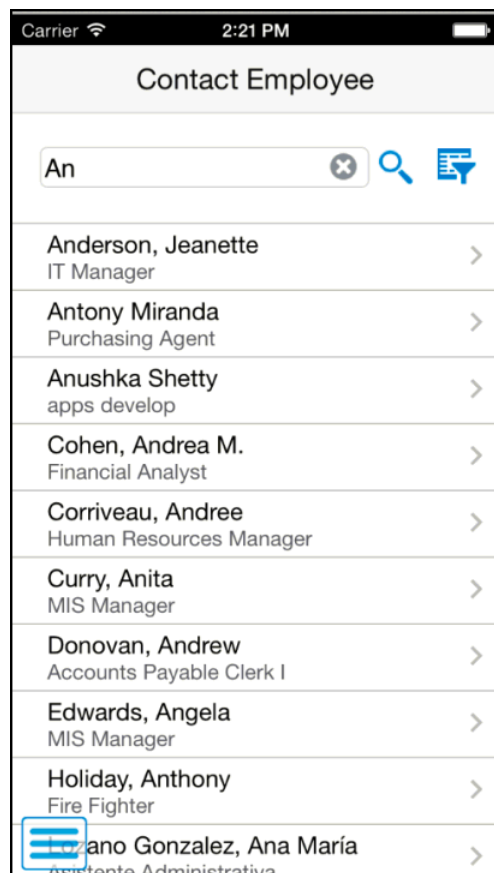
To open the application, tap the icon and log in.

32.3.1 Reviewing Employee Information Using Contact Employee Mobile Smartphone Application

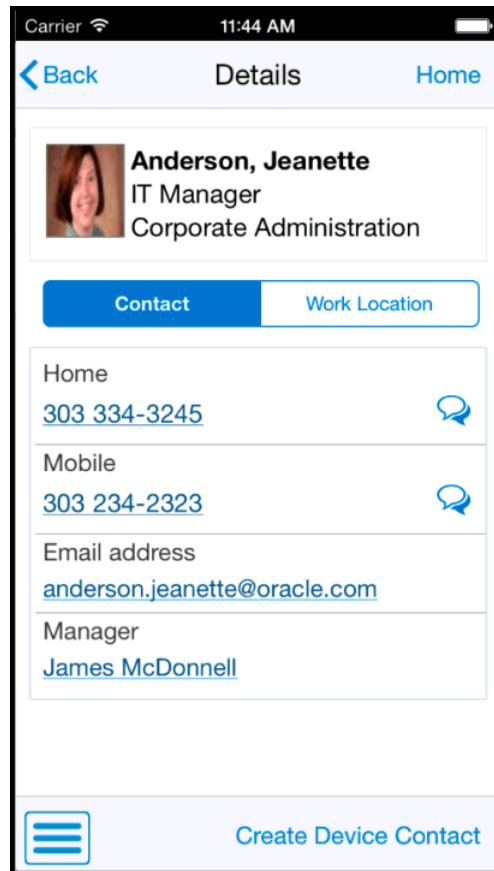
To review employee information:

1. Open the application by tapping the icon on your device, and then log in.
See [Section 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Contact Employee home screen, enter the employee name in the Search field, and tap the Search Button. The system lists all employees that satisfy the search text.
3. To review employee information, tap the employee record from the list of contact employees.

Figure 32–1 Contact Employee - Search



On the Details screen, the system displays header information and two tabs: Contact and Work Location. The Contact tab is open by default.

Figure 32–2 Contact Employee - Contact

The header information displays an employee's photo, name, job title and home business unit.

Note: The employee photo needs to be attached to the Address Book record, through the Address Book Revisions program (P01012) in the JD Edwards EnterpriseOne system.

See Entering Address Book Records.

Entering Employee Information.

The system displays the job title of an employee based on the title specified in the Job Entry and Evaluation program (P08001) in the JD Edwards EnterpriseOne system.

See Entering Job Information

To call an employee's work phone number, tap the work phone number. To compose an SMS and send it to the employee, tap the messaging icon next to the phone number.

To call the employee on their mobile phone, tap the second phone number. To compose an SMS and send it to the employee, tap the messaging icon next to the phone number.

Note: The system displays the labels for the phone fields based on the phone type that you specify in the Work Phone Number Type and Mobile Phone Number Type processing options of the Contact Employee mobile smartphone application (M080101).

Email Address

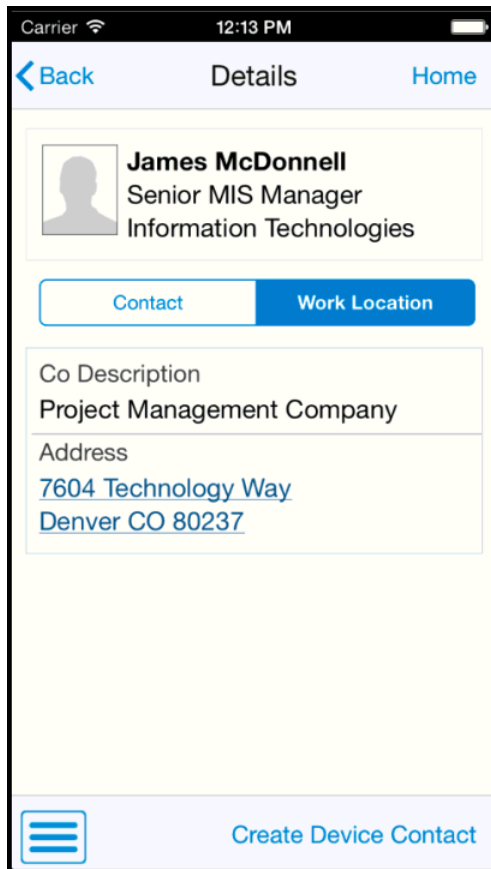
To compose an e-mail, tap the e-mail address.

Manager

To access the manager's profile, tap the manager's name.

4. To review work location details for the selected employee, tap the Work Location tab.

Figure 32–3 Contact Employee - Work Location



The system displays the employee's Home Company and work location address. Work location address information is based on the Address Book records that you have established for your company's work locations and that you have associated to a Related Address field on each employee's address book record.

Address

Tap the employee address to use the map and navigation capabilities of your mobile device.

5. Tap the Create Device Contact button to add the contact record to your device contacts. If the contact does not already exist, the system adds the contact to your device and displays a confirmation message that the contact has been added. If the contact already exists, the system does not update anything, and returns a message that the contact exists.

6. Tap the Back button to return to the previous screen.

When you tap the Back button, the application returns to the immediate previous screen.

For example, if you have moved from one employee record to the next by tapping their manager's name, when you tap Back button, the application returns you to each previous screen.

7. Tap the Home button to return to the Contact Employee home screen.
8. To further filter the employee list, tap the Filter button at the top of the Contact Employee screen.

Name

Tap the Name field to enter an employee name.

Company (Co)

Enter a home company or tap the Search icon to select the home company information.

Home Business Unit

Enter a home business unit or tap the Search icon to search for a home business unit.

Title

To enter a job title, tap the Search icon and select a job title.

To clear the search text that you entered, tap the Clear icon next to the Title field.

Manager

To search for employee's by manager, tap the Search button to search and select the manager.

To clear the search text that you entered, tap the Clear icon next to the Manager field.

9. To delete the filter values that you specified, and to enter new filter values, tap the Clear button.
10. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system takes you to the Contact Employee form and displays a list of employees, based on your filter values.
11. To discontinue the search and to go back to the Contact Employee list, tap the Cancel button.
12. To log out of the application, tap the menu button at the bottom left of the screen, and then tap Logout.

Employee Time Entry Mobile Application (Release 9.1 update)

This chapter discusses these topics:

- [Section 33.1, "Employee Time Entry Mobile Applications Overview"](#)
- [Section 33.2, "Setting Up the Employee Time Entry Mobile Applications"](#)
- [Section 33.3, "Using the Employee Time Entry Mobile Tablet Application \(M0511213\)"](#)
- [Section 33.4, "Using the Employee Time Entry Mobile Smartphone Application \(M0511214\)"](#)

Important Note: Before using the mobile application, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

Entering Timecards for Employees in the JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide.

Setting Up Self-Service Time Entry in the JD Edwards EnterpriseOne Human Capital Management Self-Service Implementation Guide.

33.1 Employee Time Entry Mobile Applications Overview

You use the Employee Time Entry mobile applications to allow employees to enter, review, update, and submit timecards. The tablet and smartphone applications enable you to enter timecards using these entry methods:

- You can view a list of pay periods. You can select a pay period and enter a new timecard.
- You can review any existing timecard. You can update timecards that are saved or rejected. You cannot update timecards that are approved or submitted for approval.
- You can copy any timecard from a historical pay period.

This table lists the applications that are available to review and update existing employee timecards, and to enter new timecards:

Type of Application	Additional Information
Base EnterpriseOne application	<p>To update existing timecards and to enter new timecards, use these applications in the JD Edwards EnterpriseOne system:</p> <ul style="list-style-type: none"> ■ Employee Time Entry application (P051123) ■ Time Entry Self Service Director program (P051125)
Tablet application	<p>Employee Time Entry (M0511213)</p> <p>To download the application to your tablet, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Employee Time Entry
Smartphone application	<p>Employee Time Entry (M0511214)</p> <p>To download the application to your device, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Employee Time Entry

Before using the Employee Time Entry tablet application, you must set up the versions and processing options for the following programs. You then specify, in the processing options for the mobile tablet application, the versions that you have set up to process timecard data on the mobile devices.

- Time Entry Self-Service Director program (P051125)
- Employee Organizational Assignments program (P0801ORG)
- Employee Basic Compensation program (P0801CMP)

33.1.1 Differences and Limitations: Employee Time Entry

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

While the Employee Time Entry mobile application does not function differently than base EnterpriseOne applications, it does offer the mobile user a subset of time entry information.

33.2 Setting Up the Employee Time Entry Mobile Applications

Before using the Employee Time Entry mobile applications, verify that the processing options for each application are set correctly. The processing options for both the tablet and smartphone applications specify which versions of the base EnterpriseOne applications the mobile applications use.

The system administrator must set the processing options for the mobile application before the application is made available to end users.

See “Setting Processing Options for Time Entry Self Service Director program (P051125)” in the *JD Edwards EnterpriseOne Applications Human Capital Management Self-Service Implementation Guide*.

33.2.1 Setting Processing Options for the Employee Time Entry Mobile Tablet Application (M0511213)

You use processing options to specify default processing information for a program.

33.2.1.1 Versions

1. Time Entry Self Service Director (P051125) Version

Use this processing option to specify the version of the Time Entry Self Service Director program (P051125) the system uses to run the Employee Time Entry mobile tablet application (M0511213). If you leave this processing option blank, the system uses version ZJDE0001.

2. Employee Organizational Assignments (P0801ORG) Version

Use this processing option to specify the version of the Employee Organizational Assignments program (P0801ORG) the system uses to run the Employee Time Entry mobile tablet application (M0511213). If you leave this processing option blank, the system uses version ZJDE0001.

3. Employee Basic Compensation (P0801CMP) Version

Use this processing option to specify the version of the Employee Basic Compensation program (P0801CMP) the system uses to run the Employee Time Entry mobile tablet application (M0511213). If you leave this processing option blank, the system uses version ZJDE0001.

33.2.2 Setting Processing Options for the Employee Time Entry Mobile Smartphone Application (M0511214)

You use processing options to specify default processing information for a program.

33.2.2.1 Versions

1. Time Entry Self Service Director (P051125) Version

Use this processing option to specify the version of the Time Entry Self Service Director program (P051125) the system uses to run the Employee Time Entry mobile smartphone application (M0511214). If you leave this processing option blank, the system uses version ZJDE0001.

2. Employee Organizational Assignments (P0801ORG) Version

Use this processing option to specify the version of the Employee Organizational Assignments program (P0801ORG) the system uses to run the Employee Time Entry mobile smartphone application (M0511214). If you leave this processing option blank, the system uses version ZJDE0001.

3. Employee Basic Compensation (P0801CMP) Version

Use this processing option to specify the version of the Employee Basic Compensation program (P0801CMP) the system uses to run the Employee Time Entry mobile smartphone application (M0511214). If you leave this processing option blank, the system uses version ZJDE0001.

33.3 Using the Employee Time Entry Mobile Tablet Application (M0511213)

The Employee Time Entry tablet application enables you to enter, review, update, and submit timecards for a selected pay period.

Before you can use the application, you must download the application from the application store, and install it on your device.

To open the application, tap the Employee Time Entry icon and log in.

33.3.1 Entering Timecards Using the Mobile Tablet Application

To enter timecards:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications."](#)
2. The Employee Time Entry home screen appears, and by default, it displays the current Pay Period on the left side as defined in the Time Entry Self-Service Director program (P051125). You can also tap the Search button to search and select a different pay period to enter your timecard.
3. The Pay Period is followed by Hours that displays the hours you have entered out of the total hours for the mentioned pay period.

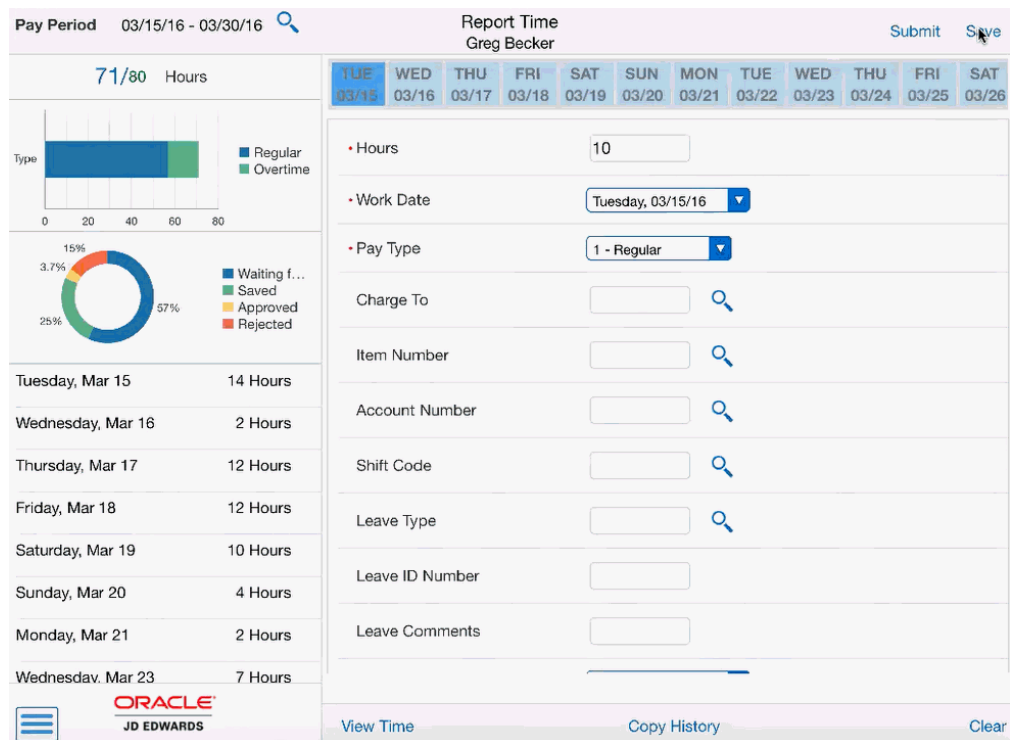
Note that the hours are also graphically displayed with hours entered in the mentioned pay period by type. Tap on each bar to get more information as a pop-up box.

The graph is followed by a pie chart that displays the percentage of hours entered in the mentioned pay period by status. Tap on each section to get more information as a pop-up box.

The left side of the screen also displays a summarized list of hours you have entered in the mentioned pay period by each day. You can select any day to view the timecard.

4. You can enter a new timecard on the right side of the screen. The top of the screen displays each day of the mentioned pay period as a Calendar. You can select any day from the Calendar or you can tap Work Date and select any day from the drop-down menu to enter a new timecard.

Figure 33–1 Report Time



5. Complete the time entry fields on the timecard; the following time entry fields are mandatory to enter details:
 - Work Date
 - Hours
 - Pay Type

Note: The time entry fields displayed on the screen are set and sequenced in the Employee Self-Service Time Entry Setup program (P051123) by the system administrator.

6. After you complete entering the data in the time entry fields on the timecard, tap one of these options:
 - Clear
Tap this option if you want to clear the values on the timecard without saving it.
 - Save
Tap this option if you want to save the timecard, but do not yet want to submit it.
 - Submit
Tap this option if you want to save and submit the timecard for approval.
7. To enter additional timecards for the pay period, repeat steps 2 through 4 in this task.
You can also add a timecard from the View Time screen:
 - Tap the View Time button at the bottom left of the Report Time screen to open it.
 - Tap the Add icon on the top right of the View Time screen.
 - Complete the time entry fields on the timecard.
 - Tap either the Save or the Submit button.

33.3.2 Reviewing, Editing, and Submitting Timecards Using the Mobile Tablet Application

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications."](#)
The Employee Time Entry home screen appears, and by default, displays the summarized list of hours you have entered each day during the current pay period.
2. You can tap on any record in the summarized list to review the timecards you have entered on the particular day within the pay period.
3. Alternatively, to view the details of all timecards that have been entered for the entire pay period, tap the View Time button at the bottom left of the screen.
4. On the View Time screen, review the list of all timecards for the pay period. You can tap the arrow on the right side of the record to display additional details.

Figure 33–2 View Time

Status	Hours	Work Date	Pay Type	Charge To	Item Number
Waiting for Approval	1.00	03/15/2016	1	50	
Waiting for Approval	5.00	03/15/2016	1	50	
Approved	4.00	03/15/2016	1	50	
Saved	1.50	03/15/2016	1	50	
Waiting for Approval	1.00	03/15/2016	1	50	
Waiting for Approval	1.00	03/15/2016	1	50	

5. You can edit a timecard that have the following status:

- Saved
- Rejected

To edit a timecard, swipe the record to the left side and tap the Edit button. You can make changes, and then tap either the Save or the Submit button.

If the timecard is at a status that does not allow you to update it, the Edit button does not appear when you swipe the record towards the left side. You can tap on the View button to view the timecard. The fields are read-only, and the timecard cannot be changed.

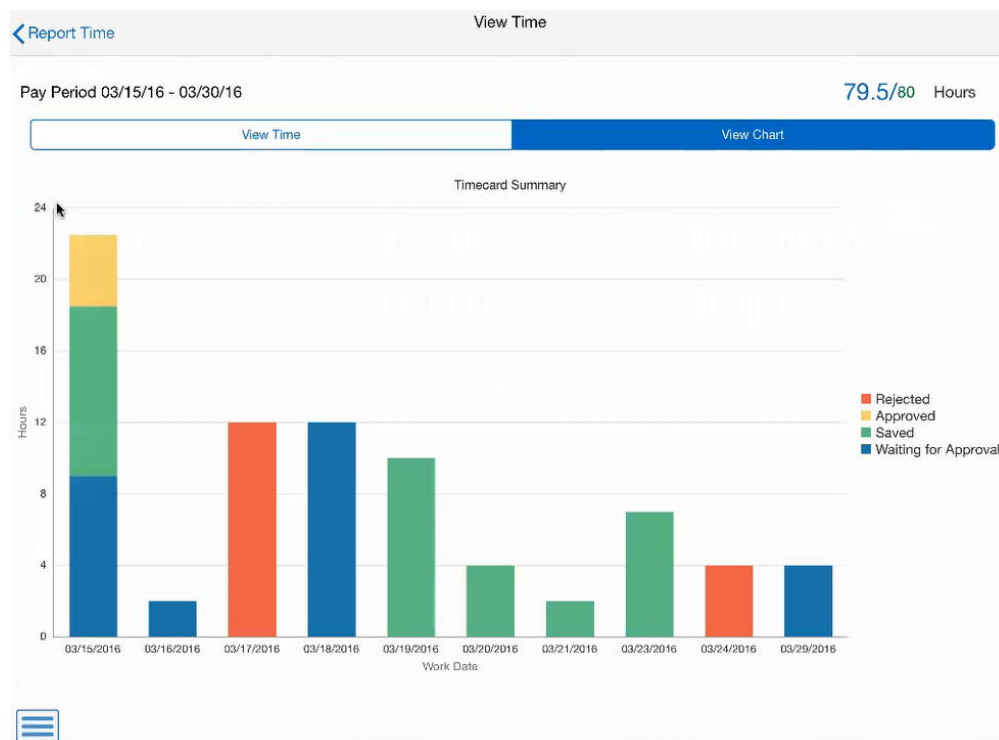
6. To select timecards for submission, tap the circle on the left side of the records you want to select, or tap the Select All button. After selecting one or more timecards, tap the Submit button at the top right of the screen. The Submit button appears only after you have selected one or more timecards. Tap the Clear All button to clear your selection.
7. To delete timecards, swipe the record towards the left side and tap the Delete button.
8. You can copy an existing timecard. To copy an existing timecard within the current pay period, swipe the record towards the left side and tap the Copy button. You can make changes, and then tap either the Save or the Submit button.

You can also copy a timecard from a historical pay period.

- On the Report Time screen, tap the Copy History button at the bottom. The Copy History screen opens.
- Tap the Search button next to Pay Period End Date to search and select your pay period. The list of timecards for the selected pay period is displayed.

- Tap the Copy button on the right side of a record to copy the existing timecard.
 - You can make changes, and then tap either the Save or the Submit button. The new timecard is saved or submitted within the current pay period.
9. To view a summary chart of the timecards in the pay period, tap the View Chart tab on the View Time screen.

Figure 33–3 View Chart



33.4 Using the Employee Time Entry Mobile Smartphone Application (M0511214)

The Employee Time Entry smartphone application enables you to enter, review, update, and submit timecards for a selected pay period.

Before you can use the application, you must download the application from the application store, and install it on your device.

To open the application, tap the Employee Time Entry icon and log in.

33.4.1 Entering Timecards Using the Mobile Smartphone Application

To enter timecards:

1. Open the application by tapping the icon on your device, and then log in.
See [Section 3, "Logging Into Mobile Enterprise Applications"](#)
2. The Employee Time Entry home screen appears, and by default, it displays the current Pay Period as defined in the Time Entry Self-Service Director program (P051125). You can also tap the Search button to search and select a different pay period to enter your timecard.

The Pay Period is followed by Hours that displays the hours you have entered out of the total hours for the mentioned pay period.

3. You can enter a new timecard. The Employee Time Entry home screen displays the Enter Time tab by default. You can tap Work Date and select any day from the drop-down menu to enter a new timecard.

Figure 33–4 Enter Time

4. Complete the time entry fields on the timecard; the following time entry fields are mandatory to enter details:
 - Work Date
 - Hours
 - Pay Type

Note: The time entry fields displayed on the screen are set and sequenced in the Employee Self-Service Time Entry Setup program (P051123) by the system administrator.

5. After you complete entering the data in the time entry fields on the timecard, tap one of these options:
 - Clear
Tap this option at the bottom right if you want to clear the values on the timecard without saving it.
 - Save

Tap this option at the top left if you want to save the timecard, but do not yet want to submit it.

- Submit

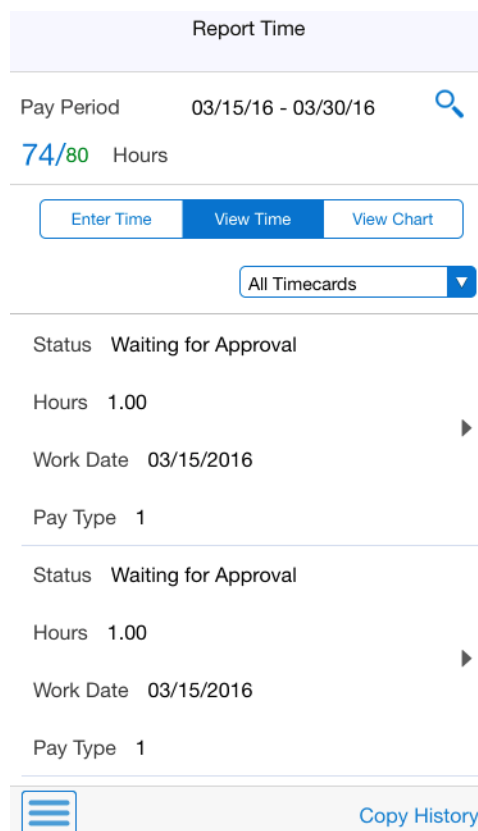
Tap this option at the top right if you want to save and submit the timecard for approval.

6. To enter additional timecards for the pay period, repeat steps 2 through 4 in this task.

33.4.2 Reviewing, Editing, and Submitting Timecards Using the Mobile Smartphone Application

1. Open the application by tapping the icon on your device, and then log in. See [Section 3, "Logging Into Mobile Enterprise Applications"](#)
2. To view the details of all timecards that have been entered for the entire pay period, tap the View Time tab.
3. On the View Time screen, review the list of all timecards for the pay period. You can tap the arrow on the right side of the record to display additional details.

Figure 33–5 View Time



4. You can edit a timecard that have the following status:
 - Saved
 - Rejected

To edit a timecard, swipe the record to the left side and tap the Edit button. You can make changes, and then tap either the Save or the Submit button.

If the timecard is at a status that does not allow you to update it, the Edit button does not appear when you swipe the record towards the left side. You can tap on the View button to view the timecard. The fields are read-only, and the timecard cannot be changed.

5. To delete timecards, swipe the record towards the left side and tap the Delete button.
6. You can copy an existing timecard. To copy an existing timecard within the current pay period, swipe the record towards the left side and tap the Copy button. You can make changes, and then tap either the Save or the Submit button.

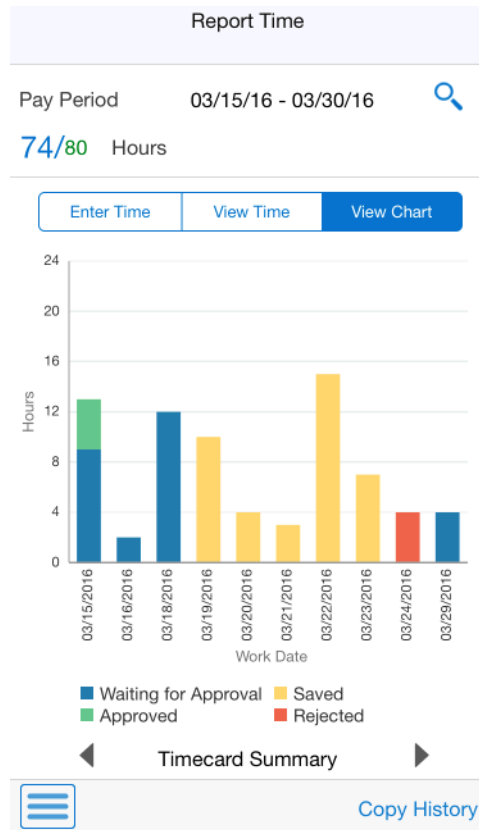
You can also copy a timecard from a historical pay period.

- On the Enter Time screen, tap the Copy History button at the bottom. The Copy History screen opens.
 - Tap the Search button next to Pay Period End Date to search and select your pay period. The list of timecards for the selected pay period is displayed.
 - Tap the Copy button on the right side of a record to copy the existing timecard.
 - You can make changes, and then tap either the Save or the Submit button. The new timecard is saved or submitted within the current pay period.
7. To view a summary chart of the timecards in the pay period, tap the View Chart tab on the View Time screen.

You can tap the View Chart tab to view the following charts:

- Timecard Summary
A summary chart of the timecards in the pay period with different status.
- Hours by Status
A pie chart that displays the percentage of hours entered in the pay period by status. Tap on each section to get more information as a pop-up box.
- Hours by Type
A graph that displays hours entered in the pay period by type. Tap on each bar to get more information as a pop-up box.

Figure 33-6 View Chart



Part VI

Project Management

This part contains these chapters:

- Chapter 34, "Change Request Approval Mobile Applications"
- Chapter 35, "Change Request Entry Mobile Applications"
- Chapter 36, "Field Progress Entry Mobile Applications"
- Chapter 37, "Field Status Review Mobile Applications"
- Chapter 38, "Job Progress Entry Mobile Application"
- Chapter 39, "Manage Cost Code Schedule Mobile Applications"
- Chapter 40, "Project Status Review Mobile Applications"
- Chapter 41, "Project Time Entry Mobile Applications"

Change Request Approval Mobile Applications

This chapter discusses these topics:

- [Section 34.1, "Change Request Approval Mobile Applications Overview"](#)
- [Section 34.2, "Setting Up the Change Request Approval Mobile Applications"](#)
- [Section 34.3, "Using the Change Request Approval Mobile Tablet Application"](#)
- [Section 34.4, "Using the Change Request Approval Mobile Tablet Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to approve change requests in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Revising and Approving Change Requests, PCOs and COs in the JD Edwards EnterpriseOne Applications Change Management Implementation Guide.](#)
-
-

34.1 Change Request Approval Mobile Applications Overview

You use the Change Request Approval mobile applications to view and update the status of change requests, and the line items associated with change requests, that are awaiting approval.

Note: Depending on your organization's change request approval processes and policies, the Change Request Entry mobile applications might have been set up to allow users to approve change requests. Contact your system administrator to determine which application you should use to approve change requests on a mobile device.

See [Chapter 35, "Change Request Entry Mobile Applications"](#)

This table lists the applications that are available to approve change requests:

Type of Application	Additional Information
Base EnterpriseOne Application	Use this application in the JD Edwards EnterpriseOne system to review and update the status of change requests that are awaiting approval: <ul style="list-style-type: none"> ■ Change Request Entry (P5310)
Tablet Application	Change Request Approval Mobile Tablet Program (M53103) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards CR Approval
Smartphone Application	Change Request Approval Mobile Phone Program (M53104) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ CR Approval

Before using the Change Request Approval tablet or smartphone application, you must set the processing options for both programs.

34.1.1 Differences and Limitations: Change Request Approval

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

34.2 Setting Up the Change Request Approval Mobile Applications

Before using the Change Request Approval mobile applications, you should review and set the processing options.

34.2.1 Setting Processing Options for the Change Request Approval Mobile Tablet Program (M53103)

You use processing options to specify default processing information for a program.

34.2.1.1 Versions

1. Change Request Entry (P5310) Version

Use this processing option to specify the version of the Change Request Entry program (P5310) that the Change Request Approval mobile application uses when processing change request information. If you leave this option blank, the system uses version ZJDE0001.

34.2.2 Setting Processing Options for the Change Request Approval Mobile Phone Program (M53104)

You use processing options to specify default processing information for a program.

34.2.2.1 Versions

1. Change Request Entry (P5310) Version

Use this processing option to specify the version of the Change Request Entry program (P5310) that the Change Request Approval mobile application uses when processing change request information. If you leave this option blank, the system uses version ZJDE0001.

34.3 Using the Change Request Approval Mobile Tablet Application

The Change Request Approval mobile tablet application enables you to review change requests that are awaiting approval, and update the status codes for the change requests and the associated line items.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

34.3.1 Approving Change Requests Using a Mobile Tablet

To approve a change request using the Change Request Approval mobile tablet application:

1. Open the application by tapping the icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. On the Change Request Approval home screen, enter a description of the change request you want to review and then tap the Search button.

You can enter text strings, individual words, or partial words. The system returns all change requests that contain the entered text in the Description field.

3. To narrow your search, tap the Filter button. In the Filters screen, complete any of the fields to narrow your search criteria. To continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of change requests that meet your search criteria.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the Filters screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

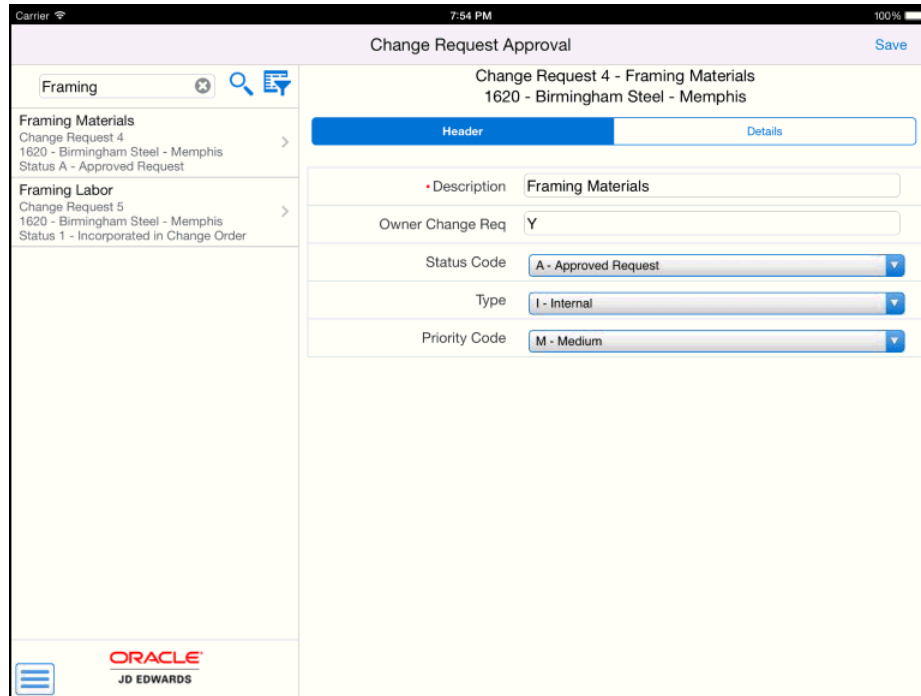
- Takes you to the list of change requests associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values, tap the Clear button.

4. When your search is complete, the system returns a list of change requests that meet your criteria, and displays the details for the first change request in the list on the right side of the screen.

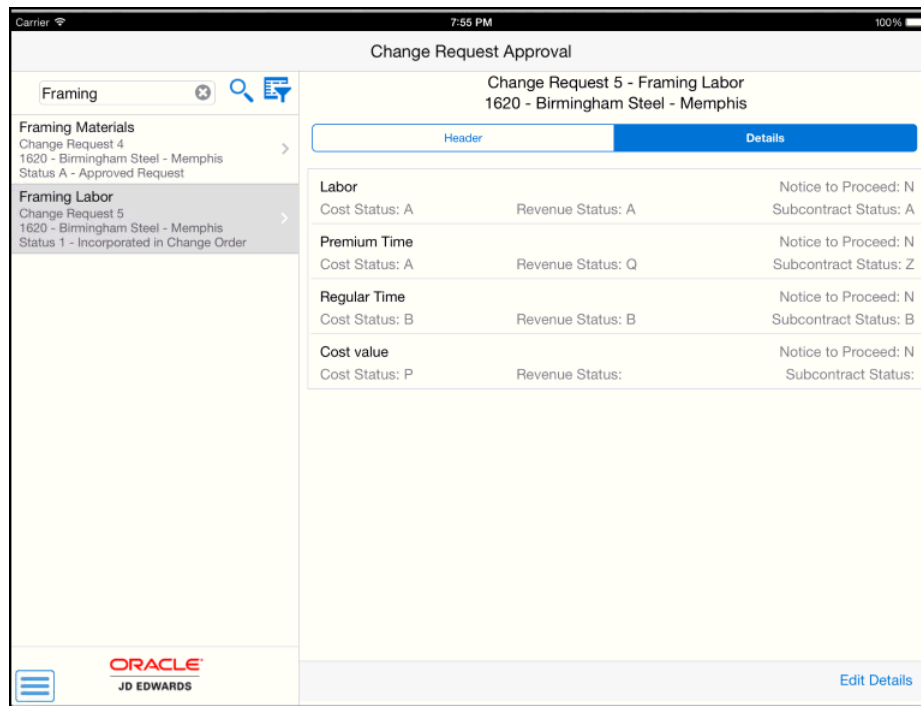
To select a different change request, tap on the record in the list on the left side of the screen.

Figure 34–1 Change Request Approval: Header Tab



5. To approve the change request at the header level, select the Approved status from the Status Code field on the Header tab, and then click Save.
6. To review the line items associated with the change request, tap the Details tab.

Figure 34–2 Change Request Approval: Details Tab



7. To update the status on any of the line items, tap the Edit Details button at the bottom of the screen.

The system displays a list of the line items on the left of the screen, and the details of the first record on the right side. To update a different line item, tap the record you want to review from the list.

Figure 34–3 Change Request Approval: Detail Line Updates

The screenshot shows the 'Change Request Approval' mobile application interface. On the left, there is a list of line items under the heading 'Change Requests'. The items are categorized into 'Labor requests', 'Premium Time1', and 'Regular Time2', each with sub-statuses. On the right, the details for 'Change Request 5 - Framing Labor' are displayed. The details include a 'Detail Description' field with the value 'Labor requests', a 'Status' field set to 'A' with an 'Approved' button, and various numerical fields for 'Original Amount', 'Quoted Amount', 'Final Amount', 'Original Unit Rate', 'Quoted Unit Rate', 'Final Unit Rate', 'Original Quantity', 'Quoted Quantity', and 'Final Quantity', all showing zero or 20,000.00. The 'Unit of Measure' is set to 'HR - Hour'. The 'Account Number' is '1620.1341.01011110' and the 'Account Description' is 'Labor'. The Oracle JD Edwards logo is visible at the bottom left of the screen.

8. Tap the Cost, Revenue, or Subcontract tab, and then update the Status field. Tap the Save button at the top right of the screen when you have finished updating the change request.
9. To return to the previous screen, tap the Change Requests button at the top left of the screen.
10. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

34.4 Using the Change Request Approval Mobile Tablet Application

The Change Request Approval mobile tablet application enables you to review change requests that are awaiting approval, and update the status codes for the change requests and the associated line items.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

34.4.1 Approving Change Requests Using a Mobile Smartphone

To approve a change request using the Change Request Approval mobile smartphone application:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Change Request Approval home screen, enter a description of the change request you want to review and then tap the Search button.

You can enter text strings, individual words, or partial words. The system returns all change requests that contain the entered text in the Description field.

3. To narrow your search, tap the Filter button. In the Filters screen, complete any of the fields to narrow your search criteria. To continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of change requests that meet your search criteria.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the Filters screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of change requests associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values, tap the Clear button.

4. When your search is complete, the system returns a list of change requests that meet your criteria.

To select a change request, tap on the record in the list.

Figure 34-4 Change Request Approval Details: Header Tab

The screenshot shows the 'Details' screen for a change request. At the top, there are navigation options: '< Requests', 'Details', and 'Save'. The main content area displays the following information:

- Title: 3 - Foundation Equipment
- Location: 1620 - Birmingham Steel - Memphis
- Header/Details tabs: 'Header' is selected.
- Description: Foundation Equipment
- Owner Change Required: Y
- Status Code: 3 - Proceed in Scope
- Type: I - Internal
- Priority Code: M - Medium

A hamburger menu icon is visible at the bottom left of the screen.

5. To approve the change request at the header level, select the Approved status from the Status Code field on the Header tab, and then click Save.
6. To review the line items associated with the change request, tap the Details tab.
7. To review the details for a line item, tap the record. The system brings you to the Line Details screen.

Figure 34–5 Change Request Approval Line Details: Cost Tab

The screenshot displays the 'Line Details' screen for a change request. At the top, there is a navigation bar with a back arrow labeled 'Request', the title 'Line Details', and a 'Save' button. Below this, the request details are shown: '3 - Foundation Equipment' and '1620 - Birmingham Steel - Memphis'. There are three tabs: 'Cost' (selected), 'Revenue', and 'Subcontract'. The main content area is divided into several sections: 'Detail Description' with a text field containing 'Equipment'; 'Cost Status' with a text field containing 'A' and a magnifying glass icon; 'Account Number' with a text field containing '1620.1350.0202026' and a magnifying glass icon; 'Account Description' with a text field containing 'Equipment'; 'Original Amount' with a text field containing '7,000.00'; and 'Original Unit Rate' with a text field containing a blue icon.

8. Tap the Cost, Revenue, or Subcontract tab, and then update the Status field. Tap the Save button at the top right of the screen when you have finished updating the change request.
9. To return to the previous screen, tap the Request button at the top left of the screen.
10. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Change Request Entry Mobile Applications

This chapter discusses these topics:

- [Section 35.1, "Change Request Entry Mobile Applications Overview"](#)
- [Section 35.2, "Setting Up the Change Request Entry Mobile Applications"](#)
- [Section 35.3, "Using the Change Request Entry Mobile Tablet Application"](#)
- [Section 35.4, "Using the Change Request Entry Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to organize, enter and update change requests in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the Change Request Entry mobile applications discussed in this chapter, see:

- [Creating Change Requests in the JD Edwards EnterpriseOne Applications Change Management Implementation Guide.](#)
-

35.1 Change Request Entry Mobile Applications Overview

You use the Change Request Entry mobile applications to enter new change requests or review and update existing change requests on your mobile device. You use change requests to record and monitor changes to a job as the job progresses. A change request is the lowest level in the change management hierarchy and contains the detailed information that you need to track changes to a job.

Details about how to organize, enter, and manage change requests can be found in the [Creating Change Requests](#) chapter in the [JD Edwards EnterpriseOne Applications Change Management Implementation Guide](#).

Note: Depending on how you set the processing options for the Change Request Entry mobile applications, users might have the ability to approve change requests from the entry application.

You can use the processing options to restrict users from approving change requests, or the detail lines associated with the change request, from the entry application. If you restrict approval from this application, users who have the authority to approve change requests can use the Change Request Approval mobile applications to approve change requests and the associated detail lines. See: [Chapter 34, "Change Request Approval Mobile Applications"](#)

This table lists the applications that are available to enter and update change requests:

Type of Application	Additional Information
Base EnterpriseOne Application	Use this application in the JD Edwards EnterpriseOne system to enter, review, and update change requests: <ul style="list-style-type: none"> Change Request Entry (P5310)
Tablet Application	Change Request Entry Mobile Tablet Program (M53101) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> JD Edwards CR Entry
Smartphone Application	Change Request Entry Mobile Phone Program (M53102) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> JD Edwards CR Entry

Before using the Change Request Entry tablet or smartphone application, you must set the processing options for both programs.

35.1.1 Differences and Limitations: Change Request Entry

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Restricting Approval

You can use the processing options of the Change Request Entry mobile application to restrict users from approving change requests, or the detail lines associated with the change request, from the entry application. To restrict users from approving records with this application, you enter the approval status codes that users are restricted from using in the processing options.

By setting up the processing options to restrict approval, you can grant access to the Change Request Entry application to all employees who have the authority to enter and update change requests, regardless of their approval authority. Then, users who have the authority to approve change requests can use the Change Request Approval mobile application to approve the change requests.

If you leave the processing options blank, the system enables users to enter, update, *and approve* the change requests and the associated detail lines on the change request from the Change Request Entry mobile application.

The implementation team for your organization should review the change request approval policies and processes to determine whether all users of the entry application are able to approve change requests, or whether to restrict approval and require authorized employees to use the Change Request Approval mobile application to approve change requests.

Initial Change Request Entry

Using the Change Request Entry mobile application, users can create a change request, and enter multiple details lines on that request. In the base EnterpriseOne application, users can enter header information, along with multiple detail lines, upon initial change request entry. Using the mobile application, the user must enter the header information for the change request, and can then enter one detail line. To enter additional lines on the request, the user must first save the change request (which can include the required header, and one optional detail line). After the change request is saved, you can update the request with the additional line items.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

35.2 Setting Up the Change Request Entry Mobile Applications

Before using the mobile applications, you must review and set the processing options.

35.2.1 Setting Processing Options for the Change Request Entry Mobile Tablet Program (M53101)

You use processing options to specify default processing information for a program.

35.2.1.1 Edits

Use the processing options on the Edits tab to restrict users from entering approval status codes in the Change Request Entry mobile application. If you leave these options blank, users are able to approve records using this application. To restrict users from approving records, you must enter the status code values that represent the approved status. Users cannot enter the status codes entered in these processing options when using the Change Request Entry mobile application.

1. Header Status Code

Use this processing option to specify the status code that is used to approve change request headers. These values are stored in UDC table 53/SD. If you leave this option blank, users can approve change requests using the Change Request Entry mobile tablet application.

2. Cost Status Code

Use this processing option to specify the status code that is used to approve cost lines on a change request. These values are stored in the F53101 table. If you leave this option blank, users can approve cost lines on a change request using the Change Request Entry mobile tablet application.

3. Revenue Status Code

Use this processing option to specify the status code that is used to approve revenue lines on a change request. These values are stored in the F53101 table. If you leave this option blank, users can approve revenue lines on a change request using the Change Request Entry mobile tablet application.

4. Subcontract Status Code

Use this processing option to specify the status code that is used to approve subcontract lines on a change request. These values are stored in the F53101 table. If you leave this option blank, users can approve subcontract lines on a change request using the Change Request Entry mobile tablet application.

35.2.1.2 Versions

1. Change Request Entry (P5310) Version

Use this processing option to specify the version of the Change Request Entry program (P5310) that the mobile application uses to process change request information on the mobile device. If you leave this option blank, the system uses version ZJDE0001.

35.2.2 Setting Processing Options for the Change Request Entry Mobile Phone Program (M53102)

You use processing options to specify default processing information for a program.

35.2.2.1 Edits

Use the processing options on the Edits tab to restrict users from entering approval status codes in the Change Request Entry mobile application. If you leave these options blank, users are able to approve records using this application. To restrict users from approving records, you must enter the status code values that represent the approved status. Users cannot enter the status codes entered in these processing options when using the Change Request Entry mobile application.

1. Header Status Code

Use this processing option to specify the status code that is used to approve change request headers. These values are stored in UDC table 53/SD. If you leave this option blank, users can approve change requests using the Change Request Entry mobile tablet application.

2. Cost Status Code

Use this processing option to specify the status code that is used to approve cost lines on a change request. These values are stored in the F53101 table. If you leave this option blank, users can approve cost lines on a change request using the Change Request Entry mobile tablet application.

3. Revenue Status Code

Use this processing option to specify the status code that is used to approve revenue lines on a change request. These values are stored in the F53101 table. If you leave this option blank, users can approve revenue lines on a change request using the Change Request Entry mobile tablet application.

4. Subcontract Status Code

Use this processing option to specify the status code that is used to approve subcontract lines on a change request. These values are stored in the F53101 table. If you leave this option blank, users can approve subcontract lines on a change request using the Change Request Entry mobile tablet application.

35.2.2.2 Versions

1. Change Request Entry (P5310) Version

Use this processing option to specify the version of the Change Request Entry program (P5310) that the mobile application uses to process change request information on the mobile device. If you leave this option blank, the system uses version ZJDE0001.

35.3 Using the Change Request Entry Mobile Tablet Application

The Change Request Entry mobile tablet application enables you to enter new change requests and review and update existing change requests.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

35.3.1 Entering Change Requests Using a Mobile Tablet

To enter a change request using the Change Request Entry mobile tablet application:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Change Requests home screen, tap the add button.

Figure 35–1 Change Requests: Add

The screenshot displays the 'Change Requests' application interface on a mobile device. At the top, there's a status bar with 'Carrier', '12:02 PM', and '100%' battery. Below that, the title 'Change Requests' is centered, with a 'Save' button on the right. A search bar labeled 'Enter Description' is on the left. A navigation bar below the search bar has tabs for 'Header', 'Cost', 'Revenue', and 'Subcontract'. The main form area contains several input fields: 'Description' (with a red asterisk), 'Job Number' (with a red asterisk and a search icon), 'Owner Change Required', 'Status Code' (a dropdown menu currently showing 'A - Approved Request'), 'Type' (a dropdown menu showing '-- Select One --'), 'Priority Code' (a dropdown menu showing '-- Select One --'), and 'Detail Description' (with a red asterisk). At the bottom left, there's a menu icon and the 'ORACLE JD EDWARDS' logo.

3. Complete the required Description and Detail Description fields. Optionally, you can also enter or select values for the following fields:
 - Job Number
 - Owner Change Required
 - Status Code
 - Type
 - Priority Code

- Detail Description
4. You can save the change request after entering the header information by tapping the Save button at the top right of the screen. Alternatively, you can also enter one detail line before saving.
 5. To enter a detail line, tap the Cost, Revenue, or Subcontract tab. Complete the necessary fields on the tab, and then tap the Save button at the top right of the screen.

Figure 35–2 Change Requests: Cost Tab

The screenshot displays the 'Change Requests' application interface on a mobile device. The top navigation bar includes a 'Save' button. Below the title, there are four tabs: 'Header', 'Cost', 'Revenue', and 'Subcontract', with 'Cost' currently selected. The left sidebar shows a list of change requests under 'Framing Materials' and 'Framing Labor'. The main area on the right contains a form with the following fields: Status (P), Original Amount (200), Quoted Amount, Final Amount, Original Unit Rate, Quoted Unit Rate, Final Unit Rate, Original Quantity, Quoted Quantity, Final Quantity, Unit of Measure (dropdown menu), Account Number, Account Description, and Pricing Type. The Oracle JD Edwards logo is located at the bottom left of the screen.

Note that you can enter only one detail line during the initial creation of the change request. To add additional detail lines to the change request, you must save the record and then update the change request with the additional lines. See the task, [Section 35.3.2, "Updating Existing Change Requests Using a Mobile Tablet"](#)

6. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

35.3.2 Updating Existing Change Requests Using a Mobile Tablet

To update an existing change request using the Change Request Entry mobile tablet application:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Change Requests home screen, enter a description of the change request and then tap the Search button.
You can enter text strings, individual words, or partial words. The system returns all change requests that contain the entered text in the Description field.
3. To narrow your search, tap the Filter button. In the Filters screen, complete any of the fields to narrow your search criteria. To continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of change requests that meet your search criteria.

- Saves the filter values that you entered. The system displays the saved filter values the next time you open the Filters screen.

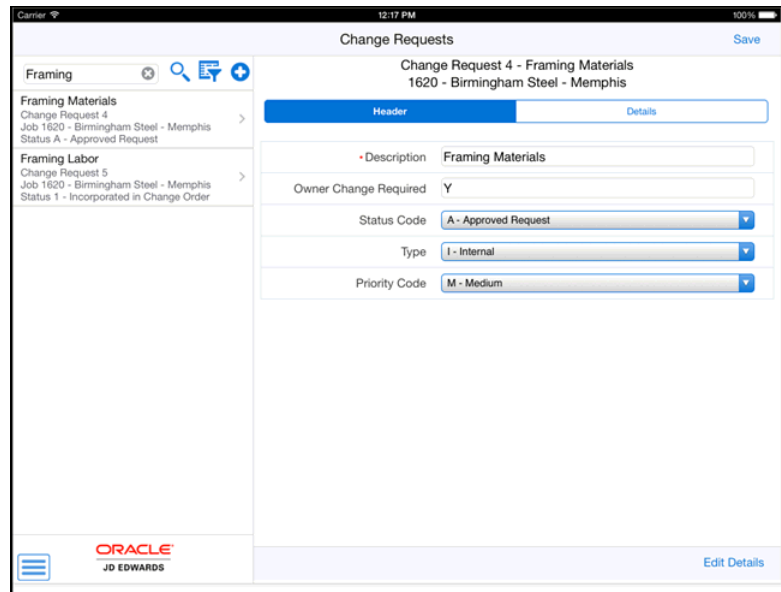
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of change requests associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values, tap the Clear button.

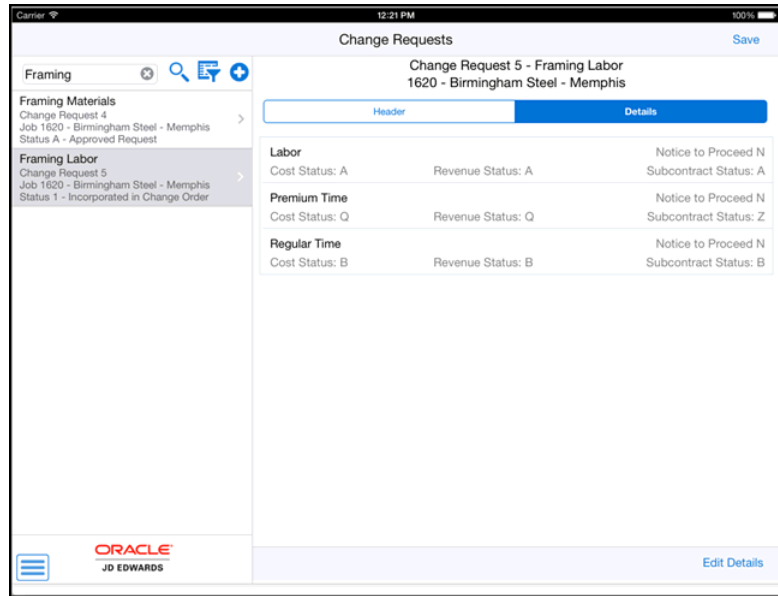
4. The system displays a list of change requests that meet your search criteria on the left of the screen, and displays on the right side of the screen the header information of the first change request in the results list.

Figure 35–3 Change Requests: Search Results



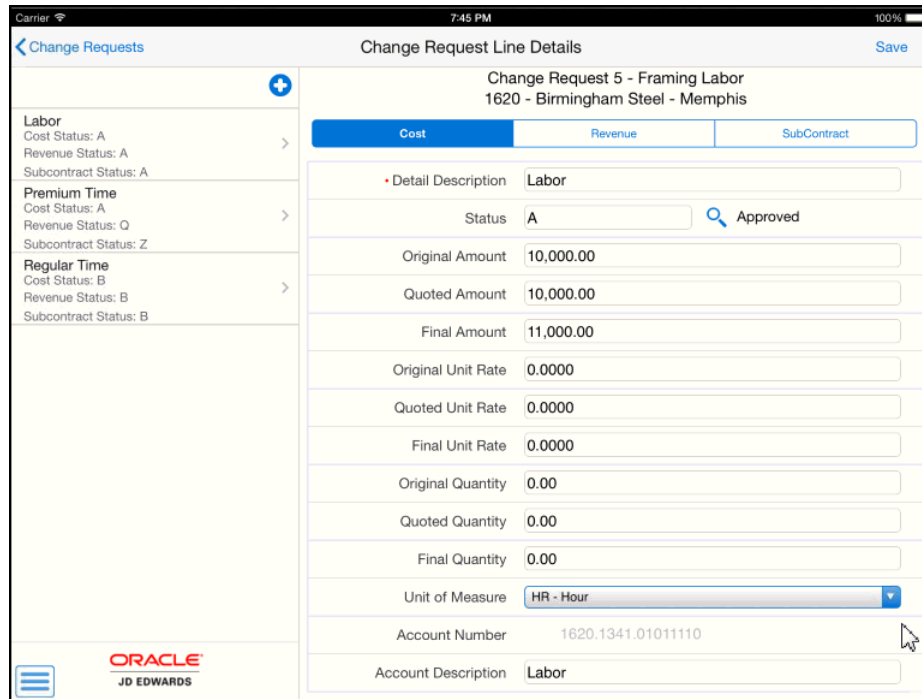
5. From the results list, tap the change request you want to update.
6. You can update any of the fields on the Header tab. If you are finished making your changes, tap the Save button at the top right of the screen.
7. Tap the Details tab to review detail line items associated with the change request.

Figure 35–4 Change Requests: Details Tab



- To update an existing line item or add a new line item, tap the Edit Details button at the bottom right of the screen. The system brings you to a new screen with each line item on the left side of the screen, and the details of the first line item displayed in the right side of the screen.

Figure 35–5 Change Request Line Details



- To update an existing line item, tap the record you want to update in the list. To enter a new line item, tap the Add button at the top of the list.
- Tap the Cost, Revenue, or Subcontract tabs to update the information for that line item. When you are finished, tap the Save button at the top right of the screen.

11. To update another line item, tap the record in the list on the left side of the screen, update the details, and then tap the Save button.
12. To return to the previous screen, tap the Change Requests button at the top right of the screen. If you have made changes to the header that you have not yet saved, tap the Save button.
13. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

35.4 Using the Change Request Entry Mobile Smartphone Application

The Change Request Entry mobile smartphone application enables you to enter new change requests and review and update existing change requests.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

35.4.1 Entering Change Requests Using a Mobile Smartphone

To enter a change request using the Change Request Entry mobile smartphone application:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. On the Change Requests home screen, tap the add button.
3. On the Header screen, complete the required Description and Job Number fields. Optionally, you can also enter or select values for the following fields:
 - Status Code
 - Type
 - Priority Code
 - Owner Change Required

Figure 35–6 Change Request Entry Header

Carrier 6:11 PM

<List Header Next

• Description

• Job Number
 🔍

Status Code
-- Select One --

Type
-- Select One --

Priority Code
-- Select One --

Owner Change Required
Y

☰

4. Tap the Next button at the top right to enter detail lines for the change request.
5. To enter a detail line, tap the Cost, Revenue, or Subcontract tab. Complete the necessary fields on each tab, and then tap the Save button at the top right of the screen.

Figure 35–7 Change Request Entry Detail

Carrier 6:11 PM

<Header Detail Save

Cost Revenue Subcontract

• Detail Description

Cost Status
 🔍

Account Number
 🔍

Account Description

Original Amount

Original Unit Rate

Original Quantity

☰

Note that you can enter only one detail line during the initial creation of the change request. To add additional detail lines to the change request, you must save the record and then update the change request with the additional lines. See the task, [Section 35.4.2, "Updating Existing Change Requests Using a Mobile Smartphone"](#)

6. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

35.4.2 Updating Existing Change Requests Using a Mobile Smartphone

To update an existing change request using the Change Request Entry mobile smartphone application:

1. Open the application by tapping the icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. On the Change Requests home screen, enter a description of the change request and then tap the Search button.

You can enter text strings, individual words, or partial words. The system returns all change requests that contain the entered text in the Description field.

3. To narrow your search, tap the Filter button. In the Filters screen, complete any of the fields to narrow your search criteria. To continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of change requests that meet your search criteria.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the Filters screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

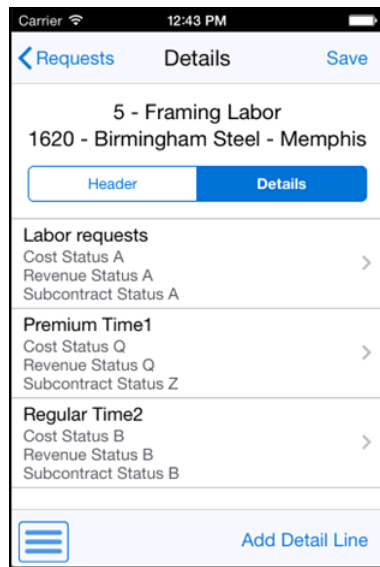
- Takes you to the list of change requests associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values, tap the Clear button.

4. The system displays a list of change requests that meet your search criteria. Tap the record you want to update.
5. You can update any of the fields on the Header tab. If you are finished making your changes, tap the Save button at the top right of the screen.
6. Tap the Details tab to review detail line items associated with the change request.
7. To update an existing line item, tap the record you want to update.

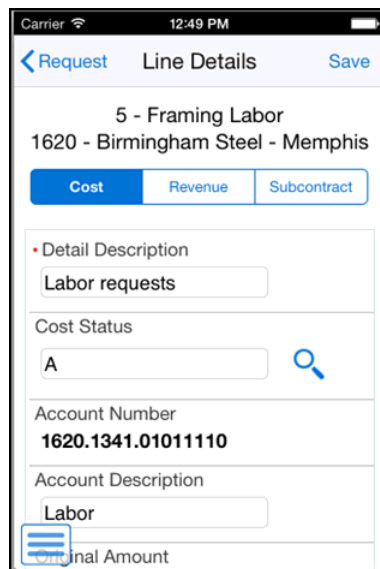
To enter a new line item, tap the Add Detail Line button at the bottom right.

Figure 35–8 Change Request Entry Details



8. Tap the Cost, Revenue, or Subcontract tabs to update the information for that line item. When you are finished, tap the Save button at the top right of the screen.

Figure 35–9 Change Request Entry Line Details



9. To update or add another line item, tap the Request button at the top left to return to the previous screen, and then repeat steps 7 and 8.
10. To return to the previous screen, tap the Request button at the top right of the screen, then tap the Requests button at the top right to return to the home screen.
11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Field Progress Entry Mobile Applications

This chapter discusses these topics:

- [Section 36.1, "Field Progress Entry Mobile Applications Overview"](#)
- [Section 36.2, "Setting Processing Options for the Field Progress Entry Mobile Applications"](#)
- [Section 36.3, "Setting Up Time Entry Information for the Mobile Field Progress Entry Applications"](#)
- [Section 36.5, "Using the Field Progress Entry Mobile Tablet Application"](#)
- [Section 36.6, "Using the Mobile Field Progress Labor Entry Smartphone Application"](#)
- [Section 36.7, "Using the Mobile Field Progress Equipment Entry Smartphone Application"](#)
- [Section 36.8, "Using the Mobile Field Account Progress Entry Smartphone Application"](#)

Important Note: Before using the Field Progress Entry mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile application discussed in this chapter, see:

- [Understanding Self-Service Time Entry in the JD Edwards EnterpriseOne Applications Human Capital Management Self Service Implementation Guide.](#)
 - [Entering Charges Using Equipment Time Entry in the JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide.](#)
 - [Understanding the Account Progress Entry Program \(P510211\) in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide.](#)
-
-

36.1 Field Progress Entry Mobile Applications Overview

The Field Progress Entry mobile applications provide project managers and others the ability to enter labor and equipment time entry, and to review account progress details for a selected job and cost code.

The Field Progress Entry mobile tablet application (M51050) enables you to perform all of these field progress entry review and update functions. Three mobile smartphone applications have been created to provide users with the ability to update field progress data:

- Mobile Field Progress Labor Entry - Phone application (M51051)
- Mobile Field Progress Equipment Entry - Phone application (M51052)
- Mobile Field Account Progress Entry - Phone application (M51053)

Using these applications, you can:

- Enter timecards for a selected crew, for your direct report employees, or for employees for whom you have delegate rights.
- Enter equipment time entry.
- Review budgeted units vs. actual units. (tablet only)
- Review and update account progress, which includes actual units, percent complete, and force +/- units.

This table lists the applications that are available to enter or update the field progress information:

Type of Application	Additional Information
Base EnterpriseOne Application	Use these applications in the JD Edwards EnterpriseOne system to review and update field progress details: <ul style="list-style-type: none"> ■ Employee Summary Time Entry program (P051128) ■ Equipment Time Entry (P12110) ■ Account Progress Entry (P510211)
Tablet Application	Mobile Field Progress Entry - Tablet (M51050) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Field Progress Entry
Smartphone Applications	Mobile Field Progress Labor Entry - Phone (M51051) To download the application to your smartphone device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Field Progress Labor Entry Mobile Field Progress Equipment Entry - Phone (M51052) To download the application to your smartphone device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Field Progress Equipment Entry Mobile Field Account Progress Entry - Phone (M51053) To download the application to your smartphone device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Field Account Progress Entry

Before using the Field Progress Entry mobile applications, you must set up processing options to specify the versions of several JD Edwards EnterpriseOne applications that are used during mobile field progress entry data processing.

Barcode Scanning (Release 9.1 Update)

The Field Progress Entry mobile tablet application (M51050) and the Field Progress Equipment Entry mobile smartphone application (M51052) are designed to scan data from a barcode and populate the equipment number in the Equipment field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

36.2 Setting Processing Options for the Field Progress Entry Mobile Applications

The Field Progress Entry mobile applications all include sets of processing options that you must review and update before using the applications. These processing options determine which versions of base EnterpriseOne programs are used when processing field progress data, and how data is displayed in the mobile applications.

36.2.1 Setting Processing Options for the Mobile Field Progress Entry Tablet Application (M51050)

You use processing options to specify default processing information for a program.

36.2.1.1 Process

1. Budget Hours Code

Use this processing option to specify the code for Budget Hours to display on the Budget/Actual tab. Values for this processing option are defined in the Define Inquiry Columns (P51921) program. For example, if you want to display the Original Budget Hours, enter the code that represents the Original Budget Hours (for example, OBU). The application then displays the hours and description associated with the OBU code.

Use the visual assist to select a valid value for this processing option.

2. Actual Hours Code

Use this processing option to specify the code for Actual Hours to display on the Budget/Actual tab. Values for this processing option are defined in the Define Inquiry Columns (P51921) program. For example, if you want to display the Actual Hours, enter the code that represents the Actual Hours (for example, AU). The application then displays the hours and description associated with the AU code.

Use the visual assist to select a valid value for this processing option.

3. Crew ID Required

Use this processing option to specify whether Crew ID on the Labor tab is a required field. Values are:

1: Crew ID required.

Blank: Crew ID is not required.

36.2.1.2 Display

1. Display Labor Tab

Use this processing option to specify whether to display the Labor tab in the application. For example, if your organization does not use JD Edwards EnterpriseOne Time and Labor, you might hide this tab. Values include:

1: Hide the Labor tab.

Blank: Display the Labor tab.

2. Display Equipment Tab

Use this processing option to specify whether to display the Equipment tab in the application. For example, if your organization does not enter equipment time, you might hide this tab. Values include:

1: Hide the Equipment tab.

Blank: Display the Equipment tab.

3. Display Account Progress Tab

Use this processing option to specify whether to display the Account Progress tab in the application. For example, if you do not want employees to update account information using the mobile application you might hide this tab. Values include:

1: Hide the Account Progress tab.

Blank: Display the Account Progress tab.

36.2.1.3 Versions

Use these processing options to specify the version of the specified program that the mobile application uses to process field progress data. If you leave any of these options blank, the system uses version ZJDE0001.

- **1. Cost Code Schedule (P51901) Version**
- **2. Job Status Inquiry (P512000) Version**
- **3. User Defined Codes (P0004A) Version**
- **4. Resource Master (P48310) Version**
- **5. Equipment Time Entry (P12110) Version**
- **6. Account Progress Entry (P510211) Version**
- **7. Equipment Search and Select (P17012S) Version**
- **8. Time Entry Self Service Director (P051125) Version**
- **9. Employee Profile (P060116) Version**
- **10. Employee Basic Compensation (P0801CMP) Version**
- **11. Employee Organizational Assignments (P0801ORG) Version**
- **12. Manager Delegates Setup (P051126) Version**
- **13. Job Progress Entry (P510212) Version**

36.2.2 Setting Processing Options for the Mobile Field Progress Labor Entry Phone Application (M51051)

You use processing options to specify default processing information for a program.

36.2.2.1 Process

3. Crew ID Required

Use this processing option to specify whether Crew ID is a required field. Values are:

1: Crew ID required.

Blank: Crew ID is not required.

36.2.2.2 Versions

Use these processing options to specify the version of the specified program that the mobile application uses to process field progress data. If you leave any of these options blank, the system uses version ZJDE0001.

- 1. Cost Code Schedule (P51901) Version
- 2. Resource Master (P48310) Version
- 3. Employee Profile (P060116) Version
- 4. Employee Basic Compensation (P0801CMP) Version
- 5. Employee Organizational Assignments (P0801ORG) Version
- 6. Time Entry Self Service Director (P051125) Version
- 7. Manager Delegates Setup (P051126) Version
- 8. User Defined Codes (P0004A) Version

36.2.3 Setting Processing Options for the Mobile Field Progress Equipment Entry Phone Application (M51052)

You use processing options to specify default processing information for a program.

36.2.3.1 Versions

Use these processing options to specify the version of the specified program that the mobile application uses to process field progress data. If you leave any of these options blank, the system uses version ZJDE0001.

- 1. Cost Code Schedule (P51901) Version
- 2. Equipment Time Entry (P12110) Version
- 3. User Defined Codes (P0004A) Version

36.2.4 Setting Processing Options for the Mobile Field Account Progress Entry Phone Application (M51053)

You use processing options to specify default processing information for a program.

36.2.4.1 Versions

Use these processing options to specify the version of the specified program that the mobile application uses to process field progress data. If you leave any of these options blank, the system uses version ZJDE0001.

- 1. Cost Code Schedule (P51901) Version
- 2. Account Progress Entry (P510211) Version
- 3. Job Progress Entry (P510212) Version

36.3 Setting Up Time Entry Information for the Mobile Field Progress Entry Applications

If you are using these mobile applications to enter timecards for employees, you must first verify that your system is set up to allow entry of timecards using the HCM Self-Service system. You also use the self-service setup to specify which pay types are available to employees when creating self-service timecards.

For additional information and instructions about setting up and using self service time entry, see [Setting Up Self-Service Time Entry](#).

Additionally, if your users are entering time for employees other than those employees who directly report to them, you must verify that delegate records have been set up, and that those records are set up with an Authorization Type of 1, which enables users to enter, change, delete, approve, and reject timecards for the specified employees. You must also verify that the delegate records are set up to include the appropriate date range.

For additional information about setting up time entry delegate information, see [Understanding Manager Delegates Setup for Time Entry](#).

If your users are using a crew ID to retrieve employees, they should verify that the system has the employees assigned to the crew in the Resource Master table (F48310). You use the Resource Master program (P48310) to assign employees to a crew.

For additional information about assigning resources to crews, see [Understanding Resource Master Records](#).

Lastly, be aware that after you create timecards using these mobile applications, those timecards are stored in the F06116Z1 table, and must be transferred to the F06116 before they can be processed through a payroll cycle. For additional information about this process, see [Setting Up Time Entry Batch Processing](#).

36.4 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Field Progress Entry mobile tablet application (M51050) and the Field Progress Equipment Entry mobile smartphone application (M51052) include the Equipment field in one location in the application. When you enter new equipment time entry information, the Equipment field displays as you select the Equipment tab in the Field Progress Entry screen for tablet application. For the smartphone application, the Equipment field appears in the Equipment screen that displays when you enter new equipment time entry information. When you enter new equipment time entry information using the Field Progress Entry tablet and smartphone applications, you must enter the equipment number in the Equipment field.

You can populate the Equipment field in the equipment time entry information screen using the following options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.

- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note: When you enable the Bluetooth option on your device, the system may disable the device's keyboard.

36.5 Using the Field Progress Entry Mobile Tablet Application

Use the Field Progress Entry tablet application to review project information, enter timecards for employees, enter billing information for equipment, and to work with account progress entries.

Before you can use the application, you must download and install the application from the application store on your device.

36.5.1 Updating Field Progress Entries Using the Field Progress Entry Mobile Tablet Application

To update field progress entry:

1. Open the application by tapping the Field Prog icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Field Progress Entry home screen, enter the job number in the Enter Job Number field and then tap the Search button.

The system displays the list of records based on your search criteria, and displays the details of the first record in the right pane of the screen.

3. If you do not know the job number, or if you want to enter additional search criteria to narrow your search results, tap the filter button.
4. In the Filters pane, the values for Cost Code, Cost Type, and Level of Detail are populated based on the default information that is set up in the versions of the programs specified in the processing options of the tablet application. You can leave these values as they are, override them, or clear them to meet your search needs. Tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of cost codes that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

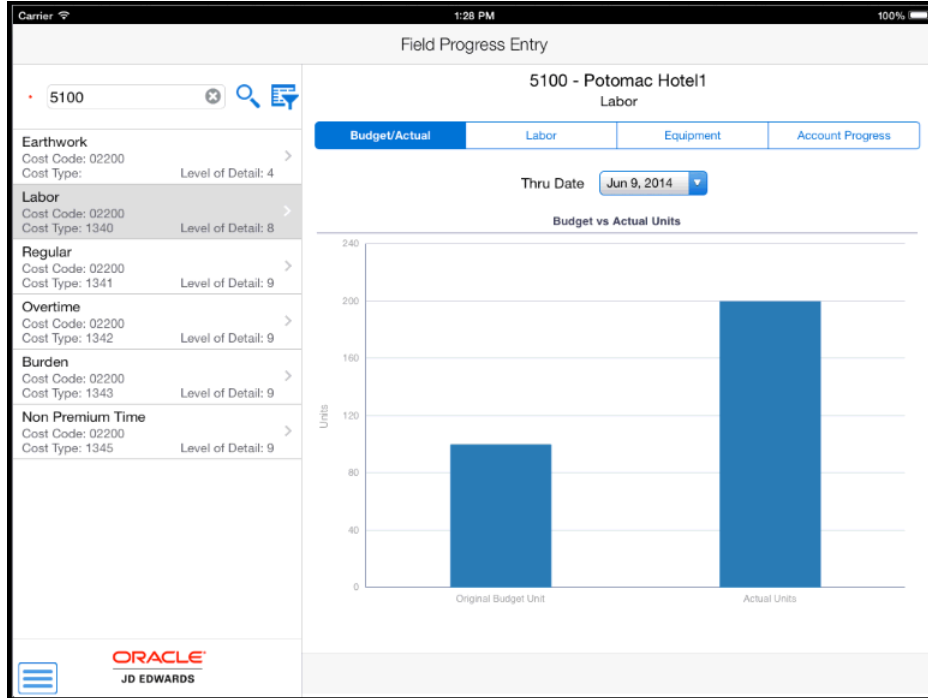
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of cost codes associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

- The system returns you to the Field Progress Entry form with a list of records that meet your search criteria. The first record is automatically selected, and details associated with that record are displayed on the right side of the screen.
Tap any record in the list to review the details for that record.

Figure 36–1 Field Progress Entry



- The device displays the Budget vs. Actual Units graph on the right side of the screen, with the system date in the Thru Date field. You can change this date.
- To enter labor details, tap the Labor tab.

Figure 36–2 Field Progress Entry: Labor Tab

The screenshot displays the 'Field Progress Entry' mobile application interface. At the top, it shows the carrier, time (1:30 PM), and battery level (100%). The main header is 'Field Progress Entry' with a sub-header '5100 - Potomac Hotel1 Labor'. Below this are four tabs: 'Budget/Actual', 'Labor' (selected), 'Equipment', and 'Account Progress'. The left sidebar lists various cost codes and their levels of detail: Earthwork (02200, 1340, Level of Detail: 4), Labor (02200, 1340, Level of Detail: 8), Regular (02200, 1341, Level of Detail: 9), Overtime (02200, 1342, Level of Detail: 9), Burden (02200, 1343, Level of Detail: 9), and Non Premium Time (02200, 1345, Level of Detail: 9). The main form contains the following fields: Crew ID (9250), Employee (8446 - Bennett, Jody), Pay Period End Date (06/10/2014), Work Date (06/01/2014), Pay Type (1 - Regular), Hours (8), Job Title (Maintenance Electrician App 2), Subledger (A - Address Book Number, 7500), Equipment Worked (34665, Forklift), Equipment Hours (4), Rate Code (01 - Hourly), and Shift Code (1 - Days). At the bottom, there are 'Clear' and 'Save' buttons, and the Oracle JD Edwards logo.

Crew ID and Employee Fields

Select an employee from the Employee drop down list. If you entered a value in the Crew ID field, the system populates the Employee list with only those employees who belong to the specified crew. If you leave the Crew ID field blank, the system populates the Employee list with all direct reports of the logged on user.

The system displays an error if you do not have the authority to enter timecards for the selected employee.

Whether the Crew ID field is required or optional is controlled by the application's processing options.

Pay Period End Date and Work Date

Use the visual assist to retrieve a valid pay period end date. The system provides only valid pay period end dates based on the selected employee's pay cycle code.

After selecting a pay period end date, select a work date. The system allows you to select from dates within the pay period associated with the specified pay period end date.

Pay Type and Hours

Select a pay type from the Pay Type drop down list. The system provides only those pay types that the employee has been authorized to use. Enter the number of hours for the timecard. These fields are required.

Additionally, complete any of the remaining optional fields on the Labor tab, and then tap the Save button at the bottom right.

The system displays the Record Created message.

8. To enter equipment time entry that can be separate from the time entered for labor and equipment, tap the Equipment tab.

Figure 36–3 Field Progress Entry: Equipment Tab

The screenshot shows the 'Field Progress Entry' mobile application interface. At the top, it displays 'Carrier', '2:24 PM', and '100%' battery. The main title is 'Field Progress Entry'. Below this, there's a search bar with '5100' and a magnifying glass icon. The entry details are for '5100 - Potomac Hotel Regular Pay'. A navigation bar at the top right has four tabs: 'Budget/Actual', 'Labor', 'Equipment' (which is selected and highlighted in blue), and 'Account Progress'. On the left side, there's a list of cost codes and types, including 'WIP Offset-Contract Bi', 'Percent of Cost Adjust', 'WIP Offset-Material Co', 'WIP Offset-Recognized', 'WIP Offset-Job Loss Pr', 'Regular Pay' (which is highlighted), 'Overtime Pay', 'Miscellaneous Pay', 'FICA/Medicare', and '401K Contribution'. The main form area contains several fields: 'Work Date' (Mar 31, 2017), 'Equipment' (1001) with a QR code icon and 'AA9 Motor Grader' text, 'Rate Code' (01 - Hourly), 'Billing Rate', 'Units/Hours' (5), 'Amount' (500), 'Remark' (Faulty Equipment), 'Subledger' (O - Order Number), and 'Batch Number'. At the bottom, there are 'Clear' and 'Save' buttons. The Oracle JD Edwards logo is visible in the bottom left corner.

Select a work date. The default date is the system date, but you can change the date if needed.

Equipment (Release 9.1 Update)

Equipment is a required field. To enter data in the Equipment field use one of the following options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 36.4, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/"4CE0460D0G" in the Equipment field to search and select a piece of equipment.

Rates, Hours, and Amount

When you enter equipment time, you can specify a rate code, and enter a billing rate. You can also enter the units or hours. For example, if you enter a billing rate of 20, and you enter 10 hours, the system calculates the amount to be 200. However, if you enter a value in the Amount field, that value overrides what you enter in the Billing Rate and Units/Hours fields. You must enter a value in either the Units/Hours field or the Amount field. Both of these fields cannot be blank.

Subledger Type and Subledger

Select a Subledger Type and then enter a valid subledger value in the Subledger field (next to the Subledger Type drop down list).

Batch Number

After you save the record, the system assigns and displays a batch number. If you enter another record with the same date, the system retains the batch number. If you enter another record with a different date, the system removes the batch number, and creates a new batch number when you save the record.

Rates, Hours, and Amount

When you enter equipment time, you can specify a rate code, and enter a billing rate. You can also enter the units or hours. For example, if you enter a billing rate of 20, and you enter 10 hours, the system calculates the amount to be 200. However, if you enter a value in the Amount field, that value overrides what you enter in the Billing Rate and Units/Hours fields. You must enter a value in either the Units/Hours field or the Amount field. Both of these fields cannot be blank.

Subledger Type and Subledger

Select a Subledger Type and then enter a valid subledger value in the Subledger field (next to the Subledger Type drop down list).

Batch Number

After you save the record, the system assigns and displays a batch number. If you enter another record with the same date, the system retains the batch number. If you enter another record with a different date, the system removes the batch number, and creates a new batch number when you save the record.

Tap the Save button at the bottom right of the screen.

9. To review and modify account progress information, tap the Account Progress tab.

Figure 36–4 Field Progress Entry: Account Progress Tab

The screenshot displays the 'Field Progress Entry' application interface. At the top, it shows '9 - Corporate Administration' and 'AE Integrity Adjustmen'. Below this, there are four tabs: 'Budget/Actual', 'Labor', 'Equipment', and 'Account Progress' (which is selected). The main area is divided into two columns. The left column lists various cost codes and their details, such as 'AE Integrity Adjustmen' (Cost Code: AE, Cost Type: 9142, Level of Detail: 8) and 'Bear Creek National Ban' (Cost Code: BEAR, Cost Type: 1105, Level of Detail: 7). The right column contains a form with the following fields: 'Subledger' (with a search icon), 'Actual Units' (value: 50), 'Percent Complete' (value: 0), 'Force +/- Units' (value: 0), 'Force Total Units' (value: 0), 'Reference' (value: BAM1225), 'Explanation' (value: Testing Detail Updates), and 'Method of Computation' (value: E - Estimate to Complete). At the bottom right, there is a 'Save' button. The Oracle JD Edwards logo is visible at the bottom left of the screen.

To enter a subledger, tap the Visual Assist button, select a Subledger type and enter a subledger value, then tap Apply. Entering a subledger is optional.

Specify values in the Actual Units, Percent Complete, Force +/- Units, and Force Total Units fields. These fields are optional. Note that the fields that are editable is determined by the value in the Method of Computation field.

The values in the Explanation and Reference fields are retrieved from program versions specified in the processing options. If no value is found for the Explanation field, the system populates the field with *Field Progress Entry*. You can override this value.

Tap the Save button at the bottom right of the screen.

10. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

36.6 Using the Mobile Field Progress Labor Entry Smartphone Application

Use the Field Progress Labor Entry smartphone application to enter the timecard information for employees by job and cost type.

Before you can use the application, you must download and install the application from the application store on your device.

36.6.1 Entering Timecards Using the Field Progress Labor Entry Mobile Smartphone Application

To enter timecards for field progress:

1. Open the application by tapping the Labor Entry icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Field Progress Labor Entry home screen, enter the job number in the Enter Job Number field and then tap the Search button.

The system displays the list of records based on your search criteria.

3. If you do not know the job number, or if you want to enter additional search criteria to narrow your search results, tap the filter button.
4. In the Filters pane, the values for Cost Code, Cost Type, and Level of Detail are populated based on the default information that is set up in the versions of the programs specified in the processing options. You can leave these values as they are, override them, or clear them to meet your search needs. Tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of cost codes that are displayed based on your filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the cost code list associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system returns you to the Field Progress Labor Entry screen with a list of records that meet your search criteria.

Tap any record in the list to review to create timecards for that record.

6. On the Labor screen, enter the timecard details.

Figure 36–5 Labor

The screenshot shows a mobile application interface for entering labor data. At the top, the status bar shows 'Carrier', signal strength, and the time '5:42 PM'. The app header has a back arrow, 'Search', the title 'Labor', and a 'Save' button. Below the header, the form is titled 'Labor' and displays 'Cost Code 02200' and 'Cost Type 1340'. The form contains several fields: 'Crew ID' with the value '9250' and a search icon; 'Employee' with a dropdown menu showing '8446 - Bennett, Jody'; 'Pay Period End Date' with the value '06/10/2014' and a search icon; 'Work Date' with a dropdown menu showing '06/02/2014'; 'Pay Type' with a dropdown menu showing '1 - Regular'; and 'Hours' with the value '10'. At the bottom left is a menu icon (three horizontal lines) and at the bottom right is a 'Clear' button.

Crew ID and Employee Fields

Select an employee from the Employee drop down list. If you entered a value in the Crew ID field, the system populates the Employee list with only those employees who belong to the specified crew. If you leave the Crew ID field blank, the system populates the Employee list with all direct reports of the logged on user.

The system displays an error if you do not have the authority to enter timecards for the selected employee.

Whether the Crew ID field is required or optional is controlled by the application's processing options.

Pay Period End Date and Work Date

Use the visual assist to retrieve a valid pay period end date. The system provides only valid pay period end dates based on the selected employee's pay cycle code.

After selecting a pay period end date, select a work date. The system allows you to select from dates within the pay period associated with the specified pay period end date.

Pay Type and Hours

Select a pay type from the Pay Type drop down list. The system provides only those pay types that the employee has been authorized to use. Enter the number of hours for the timecard. These fields are required.

Complete any of the remaining optional fields on the Labor screen.

7. Tap the Save button at the top right of the screen.
8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

36.7 Using the Mobile Field Progress Equipment Entry Smartphone Application

Use the Mobile Field Progress Equipment Entry smartphone application to enter equipment time entry information by job and cost code.

Before you can use the application, you must download and install the application from the application store on your device.

36.7.1 Entering Equipment Time Entry Using the Field Progress Equipment Entry Mobile Smartphone Application

To enter field progress equipment information:

1. Open the application by tapping the Eq Time Entry icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Field Progress Equipment Entry home screen, enter the job number in the Enter Job Number field and then tap the Search button.

The system displays the list of records based on your search criteria.

3. If you do not know the job number, or if you want to enter additional search criteria to narrow your search results, tap the filter button.
4. In the Filters pane, the values for Cost Code, Cost Type, and Level of Detail are populated based on the default information that is set up in the versions of the programs specified in the processing options. You can leave these values as they are, override them, or clear them to meet your search needs. Tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of cost codes that are displayed based on your filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the cost code list associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system returns you to the Field Progress Equipment Entry screen with a list of records that meet your search criteria.
6. Tap any record to enter equipment time for that record. The system brings you to the Equipment screen.

Figure 36–6 Equipment

Carrier 2:23 PM

Equipment Save

Equipment Billing
Cost Code Cost Type 1356

Work Date
Apr 17, 2017

Equipment
1001

Rate Code
02 - Weekly

Billing Rate
20

Clear

7. Select a work date. The default date is the system date, but you can change the date if needed.
8. Enter an equipment number.

Equipment (Release 9.1 Update)

Equipment is a required field. To enter data in the Equipment field use one of the following options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 36.4, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#).

Note: The Equipment field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment field to search and select a piece of equipment.

9. Enter the remaining timecard information.

Rates, Hours, and Amount

When you enter equipment time, you can specify a rate code, and enter a billing rate. You can also enter the units or hours. For example, if you enter a billing rate of 20, and you enter 10 hours, the system calculates the amount to be 200. However, if you enter a value in the Amount field, that value overrides what you enter in the Billing Rate and Units/Hours fields. You must enter a value in either the Units/Hours field or the Amount field. Both of these fields cannot be blank.

Subledger Type and Subledger

Select a Subledger Type and then enter a valid Subledger value.

Batch Number

After you save the record, the system assigns and displays a batch number. If you enter another record with the same date, the system retains the batch number. If you enter another record with a different date, the system removes the batch number, and creates a new batch number when you save the record.

10. Tap the Save button at the top right of the screen.
11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

36.8 Using the Mobile Field Account Progress Entry Smartphone Application

Use the Mobile Field Account Progress Entry smartphone application to work with account progress entries. This application enables you to update information by job and cost code.

Before you can use this application, you must download and install the application from the application store on your device.

36.8.1 Updating Account Progress Using the Mobile Field Account Progress Entry Smartphone Application

To update account progress entry for an account:

1. Open the application by tapping the Acct Progress icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Field Account Progress home screen, enter the job number in the Enter Job Number field and then tap the Search button.

The system displays the list of records based on your search criteria.

3. If you do not know the job number, or if you want to enter additional search criteria to narrow your search results, tap the filter button.
4. In the Filters pane, the values for Cost Code, Cost Type, and Level of Detail are populated based on the default information that is set up in the processing options in the version of the Cost Code Schedule (P51901) program. You can leave these values as they are, override them, or clear them to meet your search needs. You can also enter the job number in the Filters pane or search for the job number by description. Tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of cost codes that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the cost code list associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system returns you to the Field Account Progress screen with a list of records that meet your search criteria.

Tap any record in the list to review the details for that record.

6. The system takes you to another Account Progress screen, with the job and cost code details displayed in the header. If the selected record includes a subledger, that information is also displayed in the header.

Figure 36–7 Account Progress

Carrier 1:15 PM

< Search Account Progress Save

Regular Time
 Cost Code 00007500 - Address Book Number
 Cost Type 1341

Actual Units

Percent Complete

Force +/- Units

Force Total Units

Reference

Explanation

Subledger

To enter a subledger, tap the Subledger button at the bottom right of the screen, select a Subledger type and enter a subledger value, then tap Apply. Note that the subledger is added to the header. Entering a subledger is optional.

7. In the Account Progress screen, you can perform these steps to update cost code details:
 - Update the Actual Units field.
 - Update the Percent Complete field.
 - Update the Force Units by entering an incremental value in the Force +/- Units field. When you enter a value in this field, the system updates the Force Total Units value automatically by adding the force units to the previous force total units.
 - Update the Force Total Units field. When you enter a value in this field, the system updates the Force +/- Units value automatically with the incremental difference between the previous force total units and the new force total units.
 - Update the Reference field. The default value is based on the processing option settings from the selected version of the P510212.
 - Update the Explanation field. The default value is based on the processing option settings from the selected version of the P510212. If the processing option is blank, the default value is *Field Progress Entry*.
8. Tap the Save button at the top right of the screen.
9. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Field Status Review Mobile Applications

This chapter discusses these topics:

- [Section 37.1, "Field Status Review Mobile Applications Overview"](#)
- [Section 37.2, "Setting Up the Field Status Review Mobile Applications"](#)
- [Section 37.3, "Using the Mobile Field Status Review Tablet Application"](#)
- [Section 37.4, "Using the Mobile Field Status Review Smartphone Application"](#)

Important Note: Before using these mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile application discussed in this chapter, see:

- [Reviewing Job Information with User Defined Columns in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide](#)
 - [Entering Account Progress Information in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide](#)
 - [Entering Cost Code Schedules in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide](#)
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37.1 Field Status Review Mobile Applications Overview

You use the Field Status Review mobile applications to easily review the cost code details of a job by account. The Field Status Review mobile applications provide project managers and others the ability to review project financial information by cost code, and to add notes and photos to each cost code record.

Using the mobile tablet application, users can also add new cost code records to a job, and they can update the details of a selected record. These features are not available on the smartphone application.

During application setup, users or system administrators can specify the field names that appear on the mobile applications. These field names correspond to the columns that are set up in the Job Status Inquiry program. You can set up the mobile applications to provide the same information as the Job Status Inquiry program, or provide mobile users with a subset of the information available in that program.

This table lists the applications that are available to enter or review the progress information by job:

Type of Application	Additional Information
Base EnterpriseOne Application	Use these programs in the JD Edwards EnterpriseOne system to review and update field status details: <ul style="list-style-type: none"> ■ Cost Code Schedules (P51901) ■ Job Status Inquiry User Defined Columns (P512000) ■ Account Progress Entry (P510211) ■ Accounts (P0901)
Tablet Application	Mobile Field Status - Tablet (M51042) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Field Status Review
Smartphone application	Mobile Field Status - Phone (M51043) To download the smartphone application to your smartphone device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Field Status Review

Before using the Field Status Review mobile applications, you should first set the processing options for each application.

37.1.1 Differences and Limitations: Field Status Review

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The Field Status Review mobile tablet application allows users to specify a maximum of 10 amount fields and 10 unit fields, whereas the Field Status Review smartphone application allows for only 10 fields, which can be a combination of amounts or units.

Additionally, the tablet application allows users to update the details associated with a selected record, and it can be set up to allow users to enter new cost code records. These features are not available in the smartphone application.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

37.2 Setting Up the Field Status Review Mobile Applications

Before using the Field Status Review mobile applications, you should set the processing options for each program. The processing options are used to define the fields that appear on the applications, and also to retrieve default values from the processing options of specified versions of EnterpriseOne programs.

When you set the processing options, you can define the field names that appear on the Values tab on the smartphone application, and the fields that appear on the Amounts and Units tabs of the tablet application.

These fields are similar to the values on the Job Status Inquiry User Defined Columns program. If you want the mobile applications to reflect the same information as the Job Status Inquiry User Defined Columns program, you should set the processing options to display the same values that appear on the Columns tab of the Job Status Inquiry User Defined Columns program on the on the Values tab of the smartphone application, and on the Amounts tab of the tablet application. You can also set up the values on the Units tab of the tablet application in the same way that you set up the More Columns tab of the Job Status Inquiry User Defined Columns program.

For additional information about this program, see Understanding Job Status Inquiry-User Defined Columns Program (P512000) in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide.

You also define the versions of the following programs that you want the mobile applications to use when retrieving information. Before entering a version in the processing options of the mobile applications, you should review the processing options of the programs to verify that they are set with the correct default information.

These are the setup steps that should be completed before using the mobile applications:

- Review processing options for the Cost Code Schedule (P51901) application. See Setting Processing Options for Cost Code Schedules (P51901).
- Review processing options for the Job Status Inquiry User Defined Columns (P512000) application. See Setting Processing Options for Job Status Inquiry User Defined Columns (P512000).
- Review processing options for the Review and Revise Accounts (P0901) application. See Setting Processing Options for Review and Revise Accounts (P0901).
- Review processing options for the Account Progress Entry (P510211) application. See Setting Processing Options for Account Progress Entry (P510211).

Note: This applies only to the tablet application.

- Set processing options for the Field Status Review mobile applications (M51042 and M51043).

37.2.1 Setting Processing Options for the Mobile Field Status Tablet Application (M51042)

You use processing options to specify default processing information for a program.

37.2.1.1 Display Amounts

Amount Name 1 through 10

Using the visual assist, select values from the Search & Select Job Status Inquiry Columns form. The concatenated value of the Column Heading 1 and Column Heading 2 fields of the selected record is what will appear on the corresponding field of the mobile application. For example, if you enter AA, or select the record for AA, in the first processing option, the concatenated value of the Column Heading 1 and 2 fields will appear as *Actual Amount*.

Figure 37-1 Search & Select Job Status Inquiry Columns

Column Name	Description	Column Heading 1	Column Heading 2
<input checked="" type="radio"/> AA	Actual Amount	Actual	Amount
<input type="radio"/> AA_P	Actual Amount	Actual	Amount
<input type="radio"/> AB	Actual Amount	Actual	Amount
<input type="radio"/> AH	Bud O divided by header units	AA HU	
<input type="radio"/> ATAN	Another Column	Another	Column
<input type="radio"/> AU	Actual Units	Actual	Units
<input type="radio"/> BEV	Bev Column	Bev Column	
<input type="radio"/> BREN	Brenda	Brenda	B
<input type="radio"/> CHGO	Change Order Amount	Change	Order Amt
<input type="radio"/> CHGU	Change Order Units	Change	Order Unit

You can specify a maximum of 10 values for Amounts.

37.2.1.2 Process

1. Allow Cost Code Addition

Use this processing option to specify whether the application allows users to add a cost code to a job.

Blank: Prohibit the addition of cost code.

1: Allow the addition of cost code.

37.2.1.3 Display Units

Units Name 1 through 10

Using the visual assist, select values from the Search & Select Job Status Inquiry Columns form. The concatenated value of the Column Heading 1 and Column Heading 2 fields of the selected record is what will appear on the corresponding field of the mobile application. For example, if you enter AU, or select the record for AU, in the first processing option, the concatenated value of the Column Heading 1 and 2 fields will appear as *Actual Units*.

37.2.1.4 Versions

1. Cost Code Schedule (P51901) Version

Use this processing option to specify the version of the Cost Code Schedule program that the mobile application uses to determine default values during field status review and update. If you leave this option blank, the device uses version ZJDE0001.

2. Job Status Inquiry (P512000) Version

Use this processing option to specify the version of the Job Status Inquiry program that the mobile application uses to determine default values during field status review and update. If you leave this option blank, the device uses version ZJDE0001.

3. Account Progress Entry (P510211) Version

Use this processing option to specify the version of the Account Progress Entry program that the mobile application uses to determine default values during field status review and update. If you leave this option blank, the device uses version ZJDE0001.

4. Accounts (P0901) Version

Use this processing option to specify the version of the Accounts program that the mobile application uses to determine default values during field status review and update. If you leave this option blank, the device uses version ZJDE0001.

37.2.2 Setting Processing Options for the Mobile Field Status Phone Application (M51043)

You use processing options to specify default processing information for a program.

37.2.2.1 Values

Value Name 1 through 10

Using the visual assist, select values from the Search & Select Job Status Inquiry Columns form. The concatenated value of the Column Heading 1 and Column Heading 2 fields of the selected record is what will appear on the corresponding field on the Values tab of the mobile application. For example, if you enter AA, or select the record for AA, in the first processing option, the concatenated value of the Column Heading 1 and 2 fields will appear as *Actual Amount*.

Figure 37–2 Search & Select Job Status Inquiry Columns

Column Name	Description	Column Heading 1	Column Heading 2
<input checked="" type="radio"/> AA	Actual Amount	Actual	Amount
<input type="radio"/> AA_P	Actual Amount	Actual	Amount
<input type="radio"/> AB	Actual Amount	Actual	Amount
<input type="radio"/> AH	Bud O divided by header units	AA HIU	
<input type="radio"/> ATAN	Another Column	Another	Column
<input type="radio"/> AU	Actual Units	Actual	Units
<input type="radio"/> BEV	Bev Column	Bev Column	
<input type="radio"/> BREN	Brenda	Brenda	B
<input type="radio"/> CHGO	Change Order Amount	Change	Order Amt
<input type="radio"/> CHGU	Change Order Units	Change	Order Unit

You can specify a maximum of 10 values.

37.2.2.2 Versions

1. Cost Code Schedule (P51901) Version

Use this processing option to specify the version of the Cost Code Schedule program that the mobile application uses to determine default values during field status review and update. If you leave this option blank, the device uses version ZJDE0001.

2. Job Status Inquiry (P512000) Version

Use this processing option to specify the version of the Job Status Inquiry program that the mobile application uses to determine default values during field status review and update. If you leave this option blank, the device uses version ZJDE0001.

4. Accounts (P0901) Version

Use this processing option to specify the version of the Accounts program that the mobile application uses to determine default values during field status review and update. If you leave this option blank, the device uses version ZJDE0001.

37.3 Using the Mobile Field Status Review Tablet Application

The Field Status Review mobile application for tablet provides project managers and others the ability to review project financial information by cost code. Users can also update account information for each cost code, add or delete photos, and enter notes for each record. Depending on application setup, users can also add cost codes to a job.

Note: The application allows users to add cost code records only if the processing options are set to enable the feature.

Before you can use the application, you must download and install the application from the application store on your device.

37.3.1 Reviewing and Updating Cost Code Details Using the Mobile Field Status Review Tablet Application

To review and update cost code details:

1. Open the application by tapping the Field Status icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Field Status Review home screen, enter the job number in the Enter Job Number field and then tap the Search button.

The system displays the list of job accounts based on your search criteria. The device displays the details of the first record in the right pane of the Field Status Review screen.

3. If you do not know the job number, or if you want to enter additional search criteria to narrow your search results, tap the filter button.
4. In the Filters pane, the values for Cost Code, Cost Type, and Level of Detail are populated based on the information that is set up in the versions of the programs specified in the processing options of the tablet application. You can leave these values as they are, or override them to meet your search needs. Tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of cost codes that are displayed based on your filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the Field Status Review home screen associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

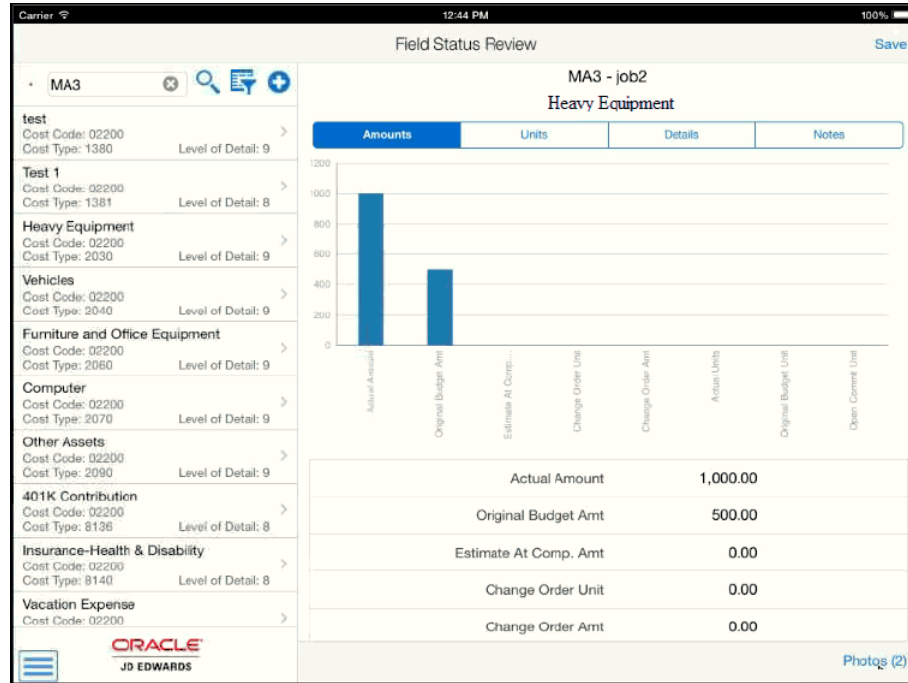
To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system returns you to the Field Status Review form with a list of cost code records that meet your search criteria. The first record is automatically selected,

and details associated with that record are displayed on the right side of the screen.

Tap any record in the list to review the details for that record.

Figure 37–3 Field Status Review



6. On the Amounts tab, review the amount information for the record. The fields that display on this tab are defined in the processing options of the mobile application. The amounts are displayed in a bar chart at the top of the screen, and also listed below the chart. This tab is read-only.
7. Tap the Units tab to review the unit information for the record. The fields that display on this tab are defined in the processing options of the mobile application. The unit values are displayed in a bar chart at the top of the screen, and also listed below the chart. This tab is read-only.
8. Tap the Details tab to review and modify cost code details. Tap the Save button at the top right to save any changes you make on this tab.

Note: The Save button on Details tab also saves changes made on the Notes tab because that is also part of the details information for the cost code record that you are working on. If you enter new notes on the Notes tab, do not tap Save on Notes. You must go to Details tab, and then tap Save. It will save information on both Details and Notes tabs.

Figure 37-4 Field Status Review: Details Tab

Note: The date fields at the top of the Details tab might be disabled to prohibit any changes to dates. These fields are enabled or disabled depending on whether your organization's mobile applications are set up to use grid capability. Contact your system administrator for additional details.

9. To view photos for the selected cost code, tap the Photos (#) button at the bottom right. The number on the button represents the number of available photos. The application displays a list of available photos, with the first photo in the list displayed on the right of the screen. To view a different photo, tap the photo in the list.
10. To delete a photo, tap the photo you want to delete, and then tap the Delete button on the Account Photos screen.
11. To add photos, tap the Add button on the Account Photos screen, and then select Album or Camera.

To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. To take a new photo, tap the Camera option, and then take a new photo using the device's camera feature. On the New Photo screen, enter a name for the photo and tap the Save button.

Tap the Back button on the Photos screen to return to the Field Status Review screen.
12. Tap the Notes tab to review notes, or add new notes to the record. To enter a new note, enter text in the New Notes section, then go to the Details tab and tap the Save button at the top right. The new note appears at the bottom of the Notes History section once it is saved.

- To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

37.3.2 Adding Cost Code Records Using the Mobile Field Status Review Tablet Application

To add a cost code record to a job:

- Open the application by tapping the Field Status icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

- From the Field Status Review home screen, enter a valid job number in the Enter Job Number field, or use the filters to search for and select a valid job number, and then tap the Search button.
- Tap the Add button next to the Enter Job Number field.

Note: The Add button appears on the screen only if the processing options are set to enable users to add cost code records and after the system has retrieved cost accounts for the specified job number.

- On the Add Cost Code screen, enter the details for the cost code record, and then tap the Save button. Alternatively, you can tap the Cancel button to exit from the Add Cost Code screen without saving the changes.

Figure 37–5 Add Cost Code

The screenshot shows the 'Add Cost Code' screen with the following details:

- Job: MA3 - job2
- Description: Computer Equipment
- Cost Code: 02200
- Cost Type: 2040
- Level of Detail: 8
- Unit of Measure: CA - Case
- Posting Edit Code: Inactive account - ?
- Adjustment Entry:
- Buttons: Save, Cancel

- The application returns you to the Field Status Review form, and has updated the filter search fields to use the values that you entered when you created the new cost code record. Therefore, the new record appears in the list on the left pane and displays the Details tab for that record on the right of the screen.

Note: The list of cost codes on the left pane may display more than one cost code if you do not specify cost code and cost type for the new cost code. However, the new cost code should display on the top in the list of cost codes and the device should show its details in the Details tab on the right pane.

6. On the Details tab, enter or select values for any of the editable fields, and then tap the Save button. For additional information about reviewing or updating this new cost code records, see the previous task in this chapter, [Section 37.3.1, "Reviewing and Updating Cost Code Details Using the Mobile Field Status Review Tablet Application"](#)

Note: After creating a new cost code record, note that the filter values change to the values specified for the new cost code. This feature enables the device to filter out other cost codes and display only the new cost code in the list to facilitate the update of the record after it is created. You can change or clear the filter values to review other cost code records.

7. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

37.4 Using the Mobile Field Status Review Smartphone Application

The Field Status Review smartphone application provides project managers and others the ability to review cost code details for a job account, add or modify notes, and work with photos for each set of cost codes for a job.

Before you can use the application, you must download and install the application from the application store on your device.

37.4.1 Reviewing and Updating Cost Code Details Using the Mobile Field Status Review Smartphone Application

To review and update cost code details:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Field Status Review home screen, enter the job number in the Enter Job Number field and then tap the Search button.

The system displays the list of job accounts based on your search criteria.

3. If you do not know the job number, or if you want to enter additional search criteria to narrow your search results, tap the filter button.
4. In the Filters pane, the values for Cost Code, Cost Type, and Level of Detail are populated based on the information that is set up in the versions of the programs specified in the processing options of the smartphone application. You can leave these values as they are, or override them to meet your search needs. Tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of cost codes that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of cost codes that are displayed based on your filter values., if applicable.

- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system returns you to the Field Status Review form with a list of cost code records that meet your search criteria.

Tap any record in the list to review the details for that record.

6. On the Account screen, the system displays the Values tab. Review the amount and unit information for the record. The fields that display on this tab are defined in the processing options of the mobile application. This tab is read-only.

Figure 37–6 Account: Values Tab

Field	Value
Actual Amount	1,000.00
Original Budget Amt	500.00
Estimate At Comp. Amt	0.00
Change Order Unit	0.00
Change Order Amt	0.00
Estimate At Comp. Amt	0.00
Actual Units	0.00
Commit Unit	

7. Tap the Details tab to review cost code details. This tab is read-only.
8. To view photos for the selected cost code, tap the Photos (#) button at the top right. The number on the button represents the number of available photos. The application displays a list of available photos. Tap the photo you want to view.
9. To delete a photo, tap the photo you want to delete, and then tap the Delete button.
10. To add photos, tap the Add button on the Account Photos screen, and then select Album or Camera.

To attach an existing photo from your device's photo gallery, tap the Album option and then select the photo you want to attach. To take a new photo, tap the Camera option, and then take a new photo using the device's camera feature. On the New Photo screen, enter a name for the photo and tap the Save button.

Tap the Back button on the Account screen.

11. Tap the Notes tab to review notes, or add new notes to the record. To enter a new note, enter text in the New Notes section, and then tap the Save button at the

bottom right. The new note appears at the bottom of the Notes History section once it is saved.

- 12.** To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Job Progress Entry Mobile Application

This chapter discusses these topics:

- [Section 38.2, "Job Progress Entry Overview"](#)
- [Section 38.3, "Setting Up the Job Progress Entry Mobile Tablet Application"](#)
- [Section 38.4, "Using the Job Progress Entry Mobile Tablet Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile application discussed in this chapter, see:

- [Entering Job Progress Information in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide](#)
-
-

38.1 Job Progress Entry Mobile Application Overview

You use the Job Progress Entry mobile application to review or update the progress information by job.

This table lists the applications that are available to enter or update the progress information by job:

Type of Application	Additional Information
Base EnterpriseOne Application	Use the Job Progress Entry program (P510212) in the JD Edwards EnterpriseOne system to review and update job progress details.
Tablet Application	Job Progress Entry(M51046) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Job Progress

Before using the Job Progress Entry tablet application, you must set up processing options to specify the version of the Job Cost Master and Job Progress Entry applications to use for the processing of the Job Progress Entry application.

38.2 Job Progress Entry Overview

The Job Progress Entry tablet application enables you to use your mobile device to review and update the progress data for all accounts associated with a selected job. When you select a job, the device displays the job progress details, which include:

- Actual To Date Units
- Percent Complete
- Force +/- Units
- Force Total Units

You can use cost code filter values to narrow the list of records that are displayed on the mobile device. The Job Progress Entry mobile application enables you to:

- Review job progress details based on specified search criteria.
- Update the progress information of a job.

This table lists the applications that are available to review and update the job progress information:

Type of Application	Additional Information
Base EnterpriseOne Application	Use these programs in the JD Edwards EnterpriseOne system to review and update job progress details: <ul style="list-style-type: none"> ■ Account Progress Entry (P510211) ■ Job Progress Entry (P510212) ■ Job Master (P51006)
Tablet Application	Job Progress Entry (M51046) To download the tablet application to your device, search on this text in the application store: <ul style="list-style-type: none"> ■ Job Progress Entry

Before using the Job Progress tablet application, you must set up processing options to specify the versions of these base EnterpriseOne programs that the mobile application uses when processing job progress information:

- Job Cost Master (P51006)
- Account Progress (P510211)
- Job Progress Entry (P510212)

See these topics in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide for additional information:

- Setting Processing Options for the Job Cost Master Revisions Program (P51006)
- Setting Processing Options for the Account Progress Entry Program (P510211)
- Setting Processing Options for the Job Progress Entry Program (P510212)

38.3 Setting Up the Job Progress Entry Mobile Tablet Application

Before using the Job Progress Entry mobile tablet application, set the processing options to specify the versions used by the application when processing job progress data.

38.3.1 Setting Processing Options for the Job Progress Entry Mobile Tablet Application (M51046)

You use processing options to specify default processing information for a program.

38.3.1.1 Versions

1. Job Cost Master (P51006) Version

Use this processing option to specify the version of the Job Cost Master program that the Job Progress Entry mobile tablet application uses when processing job progress data. The mobile application uses the processing option values from the selected version to determine the default job type to use when searching for jobs. If you leave this option blank, the application uses version ZJDE0001.

2. Job Progress Entry (P510212) Version

Use this processing option to specify the version of the Job Progress Entry program that the Job Progress Entry mobile tablet application uses when processing job progress data. If you leave this option blank, the application uses version ZJDE0001.

3. Account Progress Entry (P510211) Version

Use this processing option to specify the version of the Account Progress Entry program the Job Progress Entry mobile tablet application uses when processing job progress data. If you leave this option blank, the application uses version ZJDE0001.

38.4 Using the Job Progress Entry Mobile Tablet Application

You use the Job Progress Entry mobile tablet application to update job progress information from your mobile tablet.

Before you can use the application, you must download and install the application from the application store on your device.

38.4.1 Reviewing and Updating Job Progress Entries Using the Job Progress Entry Mobile Tablet Application

To review and update job progress entries:

1. Open the application by tapping the Job Progress icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Job Progress Entry home screen, enter the job description in the Enter Job Description field, then tap the Search button. The system displays a list of records that meet your search criteria in the left pane of the screen, and displays the details of the first record in the right pane.

To clear the job description, tap the Clear button.

3. To narrow your search using these additional filter fields, tap the Filter button, and complete any of these fields on the Filters screen:

Company

Job Type

Posting Edit Code

Job Number

Company

Enter the company number associated with the job.

To search for the company by company name, tap the Search button next to the Company field. The device displays companies based on your search. Tap the company that you want to select.

Job Type

From the drop down menu, select the job type associated with the job you want to review or update. The default value in the Job Type field is based on the processing option setting of the Job Master program (P51006).

Posting Edit Code

From the drop down menu, select the posting edit code associated with the job you want to review and update.

Job Number

Enter the job number of the job you want to review or update.

4. To continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of jobs that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of jobs associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. To select a job, tap the job from the job list on the left pane.

Figure 38-1 Job Progress Entry: Details

Hotel		Potomac Hotel Job Number 5100			
Potomac Hotel Job Number 5100 JB - Job Cost	>	GENERAL REQUIREMENTS	01000	Actual Units	0.00 CC
Four Seasons Hotel / Residence Job Number 7891 JB - Job Cost	>	Posting Edit: I	Level of Detail: 5	Method of Comp: N	% Complete: 0.00
		Contract Billings1	01000 5510	Actual Units	40.00
		Posting Edit:	Level of Detail: 7	Method of Comp: D	% Complete: 0.00
		Labor	01000 8481	Actual Units	0.00
		Posting Edit: N	Level of Detail: 7	Method of Comp: B	% Complete: 0.00
		Regular Time	01000 8482	Actual Units	3.00
		Posting Edit:	Level of Detail: 8	Method of Comp: C	% Complete: 0.00
		Overtime	01000 8483	Actual Units	6.00
		Posting Edit:	Level of Detail: 8	Method of Comp: D	% Complete: 0.00
		Burden	01000 8488	Actual Units	7.00
		Posting Edit:	Level of Detail: 8	Method of Comp: E	% Complete: 0.00
		Materials	01000 8489	Actual Units	15.00
		Posting Edit:	Level of Detail: 7	Method of Comp: F	% Complete: 33.00
		Traffic Maintenance	01200	Actual Units	33.00 WK
		Posting Edit: N	Level of Detail: 4	Method of Comp: N	% Complete: 0.00
		Labor	01200 1340	Actual Units	9.00 MH
		Posting Edit: N	Level of Detail: 8	Method of Comp: G	% Complete: 0.00
		Regular Time	01200 1341	Actual Units	111.00 MH
		Posting Edit:	Level of Detail: 9	Method of Comp: Q	% Complete: 0.00
		Premium Time	01200 1342	Actual Units	720.00 MH
		Posting Edit:	Level of Detail: 9	Method of Comp: Q	% Complete: 0.00
		Burden	01200 1343	Actual Units	30.00
		Posting Edit:	Level of Detail: 9	Method of Comp: Q	% Complete: 0.00
		Materials	01200 1350	Actual Units	3.00 EA
		Posting Edit:	Level of Detail: 8	Method of Comp: D	% Complete: 0.00
		Equipment	01200 1355	Actual Units	7.00 HR
		Posting Edit:	Level of Detail: 8	Method of Comp: Q	% Complete: 0.00

6. The job progress details are displayed in the right pane of the Job Progress Entry screen. Tap the Filter button at the top right of the screen to filter the display details.

Cost Code From and To

Enter values in these fields to restrict the display of detail records to those within a specific range of cost codes. The default value in the Cost Code field is based on the processing option settings from the selected version of the P510212.

Cost Type From and To

Enter values in these fields to restrict the display of detail records to those within a specific cost type range. The default value in the Cost Type field is based on the processing option settings from the selected version of the P510212.

Level of Detail

Enter a value in this field to restrict the display of detail records by level of detail. The system displays records with the selected level of detail, along with all records with a lower level of detail. For example, if you enter 9 in this field, the system displays all records. If you enter 4, the system displays records with level 3 and 4.

Method of Computation

From the drop down menu, select the method of computation associated with the detail records you want to review or update.

Note: The fields that are available for update in the job progress entry screen vary depending on the selected method of computation.

Subledger Type/Subledger

Select a subledger type from the dropdown menu and then specify the subledger value. You must enter a valid subledger number for the selected subledger type. The system displays detail records with the specific subledger details.

If you specify subledger details, the system displays the subledger type description for the selected job account when you update the record.

7. Tap the Apply button. The device takes you to the Job Progress Entry screen and displays the records that meet your specified search criteria.

Note: These filter fields work in the same way as the filter fields on other filter screens within the application. See step 4 of this task for additional information about filter fields.

8. To update a record, tap the Pencil icon next to the job account record that you want to update.
9. In the Update screen, you can perform these steps:
 - Update the Actual Units field.
 - Update the Percent Complete field.
 - Update the Force Units by entering an incremental value in the Force +/- Units field. When you enter a value in this field, the system updates the Force Total Units value automatically by adding the force units to the previous force total units.
 - Update the Force Total Units field. When you enter a value in this field, the system updates the Force +/- Units value automatically with the incremental difference between the previous force total units and the new force total units.
 - Update the Reference field. The default value is based on the processing option settings from the selected version of the P510212.
 - Update the Explanation field. The default value is based on the processing option settings from the selected version of the P510212. If the processing option is blank, the default value is *Field Progress Entry*.

Figure 38–2 Job Progress Entry: Update

The screenshot shows the 'Update' screen for 'Regular Time'. The form contains the following information:

- Regular Time
- Cost Code 01000 Cost Type 8482
- Actual Units: 6
- Percent Complete: 0
- Force +/- Units: 0
- Force Total Units: 0
- Reference: (empty field)
- Explanation: Field Progress Entry
- Method of Computation: C - Cost Code Percent...

At the bottom of the screen, there are two buttons: 'Save' and 'Cancel'.

- 10.** To save your changes, tap the Save button.
To exit the record without updating, tap the Cancel button.
- 11.** To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Manage Cost Code Schedule Mobile Applications

This chapter discusses these topics:

- [Section 39.2, "Cost Code Schedule Mobile Applications Overview"](#)
- [Section 39.3, "Setting Up the Manage Cost Code Schedule Mobile Tablet Application"](#)
- [Section 39.4, "Using the Manage Cost Code Schedule Mobile Tablet Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Entering Cost Code Schedules in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide](#)
-
-

39.1 Job Cost Schedule Mobile Applications Overview

You use the Manage Cost Code Schedule mobile application for tablet to set up a cost code schedule for the tasks within each job. You can use cost code schedules to establish a chronological order for the tasks. Some tasks might need to be scheduled sequentially, while other tasks might be scheduled concurrently. When you create a job schedule, you enter the planned start and finish dates for each task within the job.

This table lists the applications that are available to update cost code schedule information:

Type of Application	Additional Information
Base EnterpriseOne Application	Use the Cost Code Schedules program (P51901) in the JD Edwards EnterpriseOne system to establish a chronological order for the tasks within a job.
Tablet Application	Manage Cost Code Schedule (M51901) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Cost Code Schedule

Before using the Manage Cost Code Schedule tablet application, you must set up processing options to specify the version of the Manage Cost Code Schedules application to use for the processing of the Manage Cost Code Schedule mobile application.

39.1.1 Differences and Limitations: Manage Cost Code Schedule

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

39.2 Cost Code Schedule Mobile Applications Overview

You use the Cost Code Schedule mobile tablet application to set up a cost code schedule for the tasks within each job. You can use cost code schedules to establish a chronological order for the tasks. Some tasks might need to be scheduled sequentially, while other tasks might be scheduled concurrently. When you create a job schedule, you enter the planned start and finish dates for each task within the job.

This table lists the applications that are available to update cost code schedule information:

Type of Application	Additional Information
Base EnterpriseOne Application	Use the Cost Code Schedules program (P51901) in the JD Edwards EnterpriseOne system to establish a chronological order for the tasks within a job.
Tablet Application	<p>Cost Code Schedule (M51901)</p> <p>To download the application to your tablet, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ Job Schedule

Before using the Cost Code Schedule tablet application, you must set up processing options to specify the version of the Cost Code Schedules application to use when processing cost code schedule information on your mobile device.

39.2.1 Differences and Limitations: Cost Code Schedule

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

39.3 Setting Up the Manage Cost Code Schedule Mobile Tablet Application

The Manage Cost Code Schedule mobile tablet application has processing options that should be set before using the application. These processing options are used to specify default program versions, and to control display options in the application.

39.3.1 Setting Processing Options for the Manage Cost Code Schedule Mobile Tablet Application (M51901)

You use processing options to specify default processing information for a program.

39.3.1.1 Versions

Cost Code Schedule (P51901) Version

Use this processing option to specify the version of the Cost Code Schedule program that the Manage Cost Code Schedule mobile tablet application uses when processing cost code data. If you leave this option blank, the system uses version ZJDE0001.

39.3.1.2 Display

Display Planned or Actual Dates

Use this processing option to specify whether to display the planned start and finish dates or actual start and finish dates in the left pane while displaying the accounts for a job. Values are:

Blank: Display actual dates.

1: Display planned dates.

39.4 Using the Manage Cost Code Schedule Mobile Tablet Application

You can use the Manage Cost Code Schedule mobile tablet application to review and update the planned and actual start and finish dates for each cost code for a project, and to update the schedule information by entering the actual start and finish dates for each task. As a job progresses, you update the schedule information with the actual start and finish dates for each task.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

39.4.1 Updating Schedule Information Using the Manage Cost Code Schedule Tablet Application

To update cost code schedule information:

1. Open the application by tapping the Job Schedule icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Manage Cost Code Schedule home screen, enter the job number in the Enter Job Number field to narrow the search for a job. Then, tap the Search button. You must enter a job number to search for records. If you don't know the job number, continue to the next step.

The system displays a list of records that meet your search criteria on the left of the screen, and displays the details of the first record in the right pane of the screen.

3. If you do not know the job number, or if you want to enter additional search criteria to narrow your search results, tap the filter button.
4. In the Filters pane, enter your additional search criteria, and then tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of records that match your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the main screen with the cost code list displayed with the first record selected and its details displayed on the right pane.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

Cost Code From and To

Use these fields to retrieve cost code records based on a range of cost codes. The default values are retrieved from the processing option settings of the selected version of the P51901. You can change these values.

Cost Type From and To

Use these fields to retrieve cost code records based on a range of cost types. The default values are retrieved from the processing options settings of the selected version of the P51901. You can change these values.

Level of Detail

Use this field to retrieve cost code records based on the level of detail. The system retrieves records with a level of detail equal to or lower than the specified value. For example, if you enter 5 in this field, the system displays accounts at levels of detail 3, 4, and 5.

The device retrieves the default value from the processing options settings of the selected version of the P51901. You can change this value.

5. The system returns you to the Manage Cost Code Schedule home screen, with a list of records that meet your search criteria. Tap a record to review and update the details.

Figure 39–1 Cost Code Schedule

Carrier 11:32 AM 100%

Cost Code Schedule Save

5100

5100 - Potomac Hotel
Paving & Surfacing

GENERAL REQUIREMENTS Cost Code: 01000 Cost Type: Level of Detail: 3 Planned Start Date: 01/13/2014 Planned Finish Date: 06/26/2014	Planned Start Date Jul 3, 2005 Actual Start Date Jul 5, 2005
SITE WORK Cost Code: 02000 Cost Type: Level of Detail: 3 Planned Start Date: Planned Finish Date:	Planned Finish Date Jul 31, 2005 Actual Finish Date Jul 31, 2005
Earthwork Cost Code: 02200 Cost Type: Level of Detail: 4 Planned Start Date: 06/10/2005 Planned Finish Date: 07/31/2005	Schedule Number
Paving & Surfacing Cost Code: 02600 Cost Type: Level of Detail: 4 Planned Start Date: 07/03/2005 Planned Finish Date: 07/31/2005	Unit of Measure SF Square Feet
Landscaping Cost Code: 02800 Cost Type: Level of Detail: 4 Planned Start Date: 06/22/2005 Planned Finish Date: 08/01/2005	Posting Edit Code B Allow post to bud ledger type
CONCRETE Cost Code: 03000 Cost Type: Level of Detail: 3 Planned Start Date: 07/12/2005 Planned Finish Date: 08/20/2005	Method of Computation P Percent Complete
MASONRY	

ORACLE
JD EDWARDS

6. Review, and if required, update any of the values on the screen. When you have finished updating the record, tap the Save button at the top right of the screen.
7. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Project Status Review Mobile Applications

This chapter discusses these topics:

- [Section 40.1, "Project Status Review Mobile Applications Overview"](#)
- [Section 40.2, "Setting Up the Project Status Review Mobile Applications"](#)
- [Section 40.3, "Using the Project Status Review Mobile Tablet Application \(M51040\)"](#)
- [Section 40.4, "Using the Project Status Review Mobile Smartphone Application \(M51041\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

"Inquiring on Job Information" in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide.

40.1 Project Status Review Mobile Applications Overview

You use the Project Status Review mobile applications to review and update job information on your mobile device. The smartphone and tablet applications enables you to:

- Search and view job details.
- View job number and job description.
- Review amounts for a specific job.
- View and add notes and photos for a job.
- Use map and navigation features of your device to locate the job site address.

This table lists the applications that are available to review job information:

Type of Application	Additional Information
Base EnterpriseOne application	<p>To review and update job information, use these applications in the JD Edwards EnterpriseOne system:</p> <ul style="list-style-type: none"> ■ Job Status Inquiry program (P512100) ■ Job Status Inquiry User Defined Columns program (P512000) ■ Job Cost Master Revisions program (P51006) ■ Update Percent Complete program (P511112) ■ Address Book Revisions program (P01012)
Tablet application	<p>Project Status Review (M51040)</p> <p>To download the application to your tablet, search on the following text in the application store: JD Edwards Project Status</p>
Smartphone application	<p>Project Status Review (M51041)</p> <p>To download the application to your smartphone, search on the following text in the application store: JD Edwards Project Status</p>

40.1.1 Differences and Limitations: Project Status Review

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The functions of Project Status Review mobile applications are not different from base EnterpriseOne applications. However, Project Status Review mobile applications do offer the user a subset of basic job information. Not all the job information available in the base software is available in the mobile applications.

40.2 Setting Up the Project Status Review Mobile Applications

Before using the Project Status Review mobile applications, verify that the processing options for each application are set correctly. The processing options for both the tablet and the smartphone applications specify which versions of the base EnterpriseOne applications the mobile applications use.

The system administrator must set the processing options for these mobile applications before the applications are made available to end users.

See “Setting Processing Options for Job Status Inquiry User Defined Columns (P512000)” in the JD Edwards EnterpriseOne Applications Job Cost Implementation Guide.

40.2.1 Setting Processing Options for the Project Status Review Mobile Tablet Application (M51040)

You use processing options to specify default processing information for a program.

40.2.1.1 Display Amounts

1. Amount Name 1 through 10. Amount Name 10

Use this processing option to specify the amounts to display in the Amounts tab of the mobile application. Values for this processing option are defined in the Define Inquiry Columns program (P51921).

For example, if you want to display the Revised Budget Amount in the mobile application, specify the code defined in the Define Inquiry Columns (P51921) application that represents the Revised Budget Amount (i.e. RBA). The mobile application then displays the amounts and descriptions associated with the RBA code.

You can display up to 10 amounts on the tab.

40.2.1.2 Category Codes

1. Category Code 1 through 5. Category Code 5

Use this processing option to specify which Job Master Category Codes to display in the Additional Details tab of the mobile application. For example, if you want Category Code 1 (RP01) to display in this field, enter RP01 in this option. The system displays the description from the data dictionary as the display text for the field. For example, if the display text for RP01 is CatCode 001, the Category Code field on the Additional Details tab of the application will display as CatCode 001.

You can display up to five category codes on the tab. Values are:

Blank: Do not display a category code in this field.

RP01 through RP50.

Note: If you enter an invalid category code, the system will not display any values or error message.

40.2.1.3 Versions

1. Job Cost Master (P51006) Version

Use this processing option to specify the version of the Work with Job Master program (P51006) that you want to use. If you leave this option blank, the system uses the ZJDE0001 version.

2. Job Status Inquiry (P512000) Version

Use this processing option to enter the version of the Job Status Inquiry (P512000) that you want to use. If you leave this option blank, the system uses the ZJDE0001 version.

3. Address Book (P01012) Version

Use this processing option to specify the version for the Address Book (P01012) program. If you leave this processing option blank, the system uses the ZJDE0001 version.

40.2.2 Setting Processing Options for the Project Status Review Mobile Smartphone Application (M51041)

You use processing options to specify default processing information for a program.

40.2.2.1 Display Amounts

1. Amount Name 1 through 10. Amount Name 10

Use this processing option to specify the amounts to display in the Amounts tab of the mobile application. Values for this processing option are defined in the Define Inquiry Columns program (P51921).

For example, if you want to display the Revised Budget Amount in the mobile application, specify the code defined in the Define Inquiry Columns (P51921) application that represents the Revised Budget Amount (i.e. RBA). The mobile application then displays the amounts and descriptions associated with the RBA code.

You can display up to 10 amounts on the tab.

40.2.2.2 Category Codes

1. Category Code 1 through 5. Category Code 5

Use this processing option to specify which Job Master Category Codes to display in the Additional Details tab of the mobile application. For example, if you want Category Code 1 (RP01) to display in this field, enter RP01 in this option. The system displays the description from the data dictionary as the display text for the field. For example, if the display text for RP01 is CatCode 001, the Category Code field on the Additional Details tab of the application will display as CatCode 001.

You can display up to five category codes on the tab. Values are:

Blank: Do not display a category code in this field.

RP01 through RP50.

Note: If you enter an invalid category code, the system will not display any values or error message.

40.2.2.3 Versions

1. Job Cost Master (P51006) Version

Use this processing option to specify the version of the Work with Job Master program (P51006) that you want to use. If you leave this option blank, the system uses the ZJDE0001 version.

2. Job Status Inquiry (P512000) Version

Use this processing option to enter the version of the Job Status Inquiry (P512000) that you want to use. If you leave this option blank, the system uses the ZJDE0001 version.

3. Address Book (P01012) Version

Use this processing option to specify the version for the Address Book (P01012) program. If you leave this processing option blank, the system uses the ZJDE0001 version.

40.3 Using the Project Status Review Mobile Tablet Application (M51040)

The Project Status Review tablet application enables you to review and update basic job information.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

40.3.1 Reviewing and Updating Job Information Using a Mobile Tablet Application

To review and update job information on your tablet:

1. Open the application by tapping the Project Status icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. On the Project Status home screen, enter the whole or partial job description and tap the search icon next to the job description field. The system displays the list of jobs that match the search criteria in the left pane.
3. To search for a job by company, job type, posting edit code, and job number, tap the filters button next to the Enter Job Description field.

Company

To search for a value by company description, tap the Search icon, or you can manually enter a company description in the Company field.

Job Type and Posting Edit Code

To specify values for the job type and posting edit code, tap the dropdown menus, and select the values from the respective dropdown menus.

Job Number

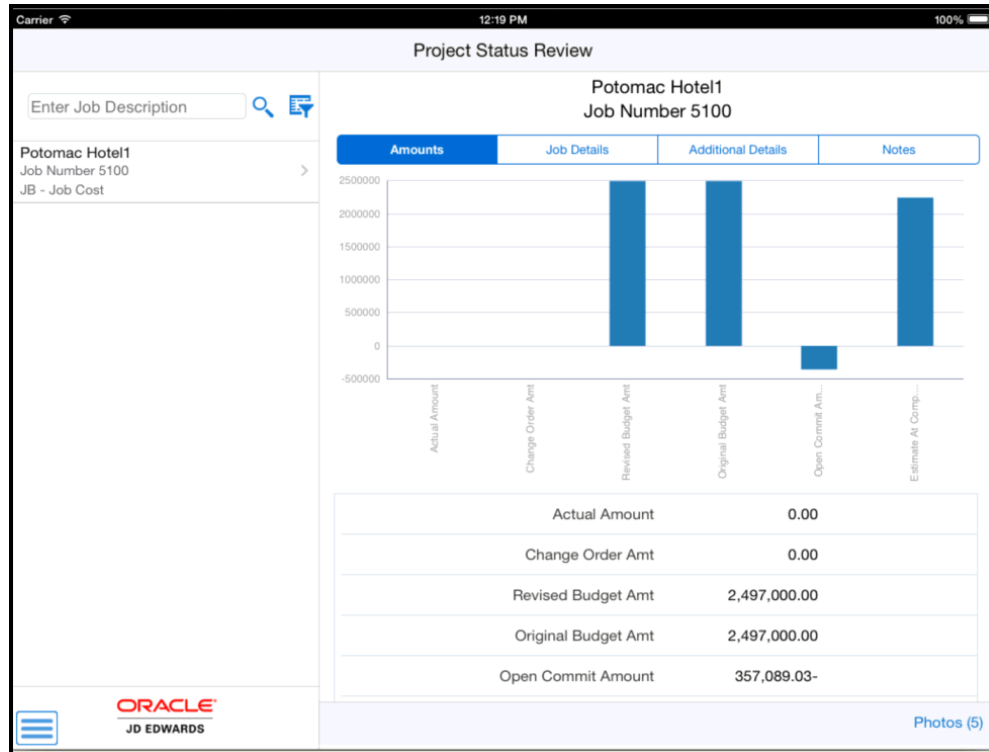
To enter the job number, tap the Job Number field.

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of job details, that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.
5. To stop using the filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:
 - Takes you to the list of job details associated with the last saved filter values, if applicable.
 - Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all of the filter values that you specified, and to enter new filter values, tap the Clear button.

6. To review and update details about a job, tap the job from the list in the left pane. Note that the first record in the list of search results is displayed in the right side of the screen.
7. To view the amount information for a specific job, tap the Amounts tab.

Figure 40-1 Amounts tab



The system displays the amounts, the amounts description, and the bar graph in the right pane, based on the processing options specified in the Project Status Review mobile application.

Note: The amounts bar graph displayed in the right pane coincides with the amounts and amount description displayed below the bar graph.

- To review and update the job details, tap the Job Details tab.

Figure 40–2 Job Details

The screenshot shows the 'Project Status Review' mobile application interface. At the top, it displays 'Carrier', '12:19 PM', and '100%' battery. The main title is 'Project Status Review' with a 'Save' button. Below the title, the job information is 'Potomac Hotel1' and 'Job Number 5100'. There are four tabs: 'Amounts', 'Job Details' (selected), 'Additional Details', and 'Notes'. The 'Job Details' section includes:

- Job Site: 4343 (with a search icon and 'Parts Emporiumm DON...')
- Supervisor: 4344 (with a search icon and 'Universal Inceptora...')
- Planned Start Date: Jun 10, 2012 (dropdown)
- Actual Start Date: Jun 15, 2012 (dropdown)
- Planned Complete Date: Apr 30, 2017 (dropdown)
- Actual Complete Date: May 22, 2017 (dropdown)
- Percent Complete: 2.00
- Posting Edit Code: Post Transaction: (dropdown)
- Adjustment Only:
- Job Site Address: [4022 Walnut Street, Suite 280](#)
[Parts Emporium DJJ](#)
[Grand Theatre](#)
[Denver CO](#)

At the bottom, there is an 'ORACLE JD EDWARDS' logo on the left and a 'Photos (5)' link on the right.

In the Job Details screen, use the search icon to search and select new values for the Job Site and Supervisor fields.

Select the values for the planned start date, planned complete date, actual start date, and actual complete date from the respective dropdown menus.

To enter the percent complete value, tap the Percent Complete field.

To select a value for the posting edit code, tap the Posting Edit Code dropdown.

To include only adjustments records, tap the Adjustment Only check box.

To locate the job site by using the device map and navigational feature, tap the job site address link.

9. To review and update additional details for a specific job, tap the Additional Details tab.

Figure 40–3 Additional Details

The screenshot shows the 'Project Status Review' application interface. At the top, it says 'Project Status Review' and 'Save'. Below that, the job details are 'Potomac Hotel1' and 'Job Number 5100'. There are four tabs: 'Amounts', 'Job Details', 'Additional Details' (which is selected), and 'Notes'. On the left side, there is a search bar 'Enter Job Description' and a list of job details for 'Potomac Hotel1 Job Number 5100' including 'JB - Job Cost'. The main content area shows five 'Address Number' fields with values 4001, 3488, 4002, 4003, and 4012, each with a search icon and a dropdown menu. Below that, there are five 'CatCode' fields with values 001, 002, 003, 004, and 005, each with a corresponding description: 185 Operations, 240 Central North America, DEV Real Estate Development Group, 410 Denver Branch, and 100 Denver Area. At the bottom, there is an Oracle JD Edwards logo and a 'Photos (5)' button.

Address Numbers

Use the Search icon to search and select address book numbers for the address number fields.

Category Codes

The system displays category codes based on the processing options that you have specified for the Project Status Review mobile tablet application. These fields are non-editable.

10. To enter notes and view notes history, tap the Notes tab. To enter text, tap the New Notes field.
11. To save the values entered for a specific job, tap the Save button.
12. To add or view photos of the job, tap the Photos button in the right pane. The number displayed on the Photos button represents the total number of photos related to the job.
13. To add a photo, tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the job information, tap the Album option.

To take a new photo by the device's camera feature, tap the Camera option.

You can add a description of the photo.
14. The system adds the photo to the Photos screen, and displays the number of photos available for the job on the Photos button.
15. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

40.4 Using the Project Status Review Mobile Smartphone Application (M51041)

To review and update job information on your smartphone:

1. Open the application by tapping the Project Status icon on your device, and then log in.

See Section 2, “Logging Into Mobile Enterprise Applications”.

2. From the Project Status home screen, enter the job description, partially or in whole, in the Enter Job Description field to narrow the search for a specific job. Then, tap the Search icon next to the Enter Job Description field to search for a job by description. Alternately, you can leave the Enter Job Description field empty and tap the Search button to retrieve all jobs.
3. To search for a job by company, job type, posting edit code, and job number, tap the filters button next to the Enter Job Description field.

Figure 40–4 Filters

Company

To search for a value by company description, tap the Search icon, or you can manually enter a company description in the Company field.

Job Type and Posting Edit Code

To specify values for the job type and posting edit code, tap the dropdown menus, and select the values from the respective dropdown menu.

Job Number

To enter the job number, tap the Job Number field.

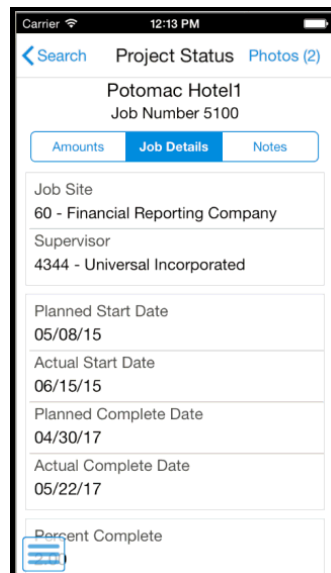
4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of job details, that are displayed based on your filter values.

- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.
- 5. To stop using the filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:
 - Takes you to the list of job details associated with the last saved filter values, if applicable.
 - Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all of the filter values that you specified, and to enter new filter values, tap the Clear button.
- 6. To review and update details about a specific job, tap the job from the Jobs list.
- 7. To view the amount information for a specific job, tap the Amounts tab.

The system displays the amounts and amounts description based on the processing options that you have specified in the Project Status Review mobile application.
- 8. To review the job details, tap the Job Details tab.

Figure 40–5 Job Details Tab



In the Job Details screen, the system displays category codes based on the processing options that you have specified for the Project Status Review mobile tablet application. These fields are non-editable.

To locate the job site by using the device map and navigational feature, tap the job site address link.

- 9. To enter notes and view notes history, tap the Notes tab. To enter text, tap the New Notes field.
- 10. To save the notes entered for a specific job, tap the save button.
- 11. To add or view photos of the job, tap the Photos button in the right pane. The number displayed on the Photos button represents the total number of photos related to the job.

- 12.** To add a photo, tap the Add button. The system displays two options: Album and Camera.

To attach an existing photo from your device's photo gallery to the job information, tap the Album option.

To take a new photo by the device's camera feature, tap the Camera option.

You can add a description of the photo.

- 13.** The system adds the photo to the Photos screen, and displays the number of photos available for the job on the Photos button.
- 14.** To return to the home screen of Project Status, tap the Search button in the top left of the screen.
- 15.** To log out of the application, tap the Menu button in the bottom left of the screen, and then tap Logout.

Project Time Entry Mobile Applications

This chapter discusses these topics:

- [Section 41.1, "Project Time Entry Mobile Applications Overview"](#)
- [Section 41.2, "Setting Up the Project Time Entry Mobile Applications"](#)
- [Section 41.3, "Using the Project Time Entry Mobile Tablet Application \(M51047\)"](#)
- [Section 41.4, "Using the Project Time Entry Mobile Smartphone Application \(M51048\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

Entering Timecards for Employees in the JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide.

Setting Up Self-Service Time Entry in the JD Edwards EnterpriseOne Human Capital Management Self-Service Implementation Guide.

41.1 Project Time Entry Mobile Applications Overview

You use the Project Time Entry mobile applications to allow employees to enter, review, update and submit project and non-project timecards. The smartphone and tablet applications enable you to enter timecards using these entry methods:

- You can view a list of timecard accounts for which time has already been charged to during a pay period. You can then select the account to enter a new timecard using that account.
- You can view a list of project accounts. You can then select the project to enter a new timecard using the project account.
- You can enter non-project timecards.

This table lists the applications that are available to review and update existing employee timecards, and to enter new timecards:

Type of Application	Additional Information
Base EnterpriseOne application	To update existing timecards and to enter new timecards, use these applications in the JD Edwards EnterpriseOne system: <ul style="list-style-type: none"> ■ Time Entry Self Service Director program (P051125) ■ Daily Time Entry (P051127)
Tablet application	Project Time Entry (M51047) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Project Time Entry
Smartphone application	Project Time Entry (M51048) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Project Time Entry

Before using the Project Time Entry tablet or smartphone application, you must set up the versions and processing options for the following programs. You then specify, in the processing options for the mobile tablet and smartphone applications, the versions that you have set up to process timecard data on the mobile devices.

- Time Entry Self-Service Director program (P051125)
- Employee Summary Time Entry program (P051128)
- Cost Code Schedule program (P51901)
- Employee Organizational Assignments program (P0801ORG)
- Employee Basic Compensation program (P0801CMP)
- Speed Time Entry program (P051121)

41.1.1 Differences and Limitations: Project Time Entry

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The functions of the Project Time Entry mobile applications are not different from base EnterpriseOne applications. Therefore, not all the timecard information for a job available in the base software is available in the mobile applications.

41.2 Setting Up the Project Time Entry Mobile Applications

Before using the Project Time Entry mobile applications, verify that the processing options for each application are set correctly. The processing options for both the tablet and the smartphone applications specify which versions of the base EnterpriseOne applications the mobile applications use.

The system administrator must set the processing options for these mobile applications before the applications are made available to end users.

See "Setting Processing Options for Time Entry Self Service Director program (P051125)" in the *JD Edwards EnterpriseOne Applications Human Capital Management Self-Service Implementation Guide*.

(Release 9.2 Update) You can use one of the following options to scan barcodes of equipment number:

- Disable the Bluetooth option in the settings on your device if you want to use the native device camera to scan the barcodes of equipment number.
- Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes of equipment number.

To scan barcodes using the Bluetooth scanning device, you must configure the scanning device to the mobile device.

41.2.1 Setting Processing Options for the Project Time Entry Mobile Tablet Application (M51047)

You use processing options to specify default processing information for a program.

41.2.1.1 Versions

1. Time Entry Self Service Director (P051125) Version

Use this processing option to specify the version of the Time Entry Self Service Director program (P051125) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

2. Employee Summary Time Entry (P051128) Version

Use this processing option to specify the version of the Employee Summary Time Entry program (P051128) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

3. Cost Code Schedule (P51901) Version

Use this processing option to specify the version of the Cost Code Schedule program (P51901) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

4. Employee Organizational Assignments (P0801ORG) Version

Use this processing option to specify the version of the Employee Organizational Assignments program (P0801ORG) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

5. Employee Basic Compensation (P0801CMP) Version

Use this processing option to specify the version of the Employee Basic Compensation program (P0801CMP) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

6. Speed Time Entry (P051121) Version

Use this processing option to specify the version of the Speed Time Entry program (P051121) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

41.2.2 Setting Processing Options for the Project Time Entry Mobile Smartphone Application (M51048)

You use processing options to specify default processing information for a program.

41.2.2.1 Versions

1. Time Entry Self Service Director (P051125) Version

Use this processing option to specify the version of the Time Entry Self Service Director program (P051125) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

2. Employee Summary Time Entry (P051128) Version

Use this processing option to specify the version of the Employee Summary Time Entry program (P051128) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

3. Cost Code Schedule (P51901) Version

Use this processing option to specify the version of the Cost Code Schedule program (P51901) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

4. Employee Organizational Assignments (P0801ORG) Version

Use this processing option to specify the version of the Employee Organizational Assignments program (P0801ORG) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

5. Employee Basic Compensation (P0801CMP) Version

Use this processing option to specify the version of the Employee Basic Compensation program (P0801CMP) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

6. Speed Time Entry (P051121) Version

Use this processing option to specify the version of the Speed Time Entry program (P051121) the system uses to run the Project Time Entry mobile tablet application (M51047). If you leave this processing option blank, the system uses version ZJDE0001.

41.3 Using the Project Time Entry Mobile Tablet Application (M51047)

The Project Time Entry tablet application enables you to enter, review, update, and submit project and non-project timecards for a selected pay period.

Before you can use the application, you must download the application from the application store, and install it on your device.

To open the application, tap the Project Time Entry icon and log in.

41.3.1 Entering Project Timecards Using the Mobile Tablet Application

To enter project timecards:

1. Open the application by tapping the icon on your device, and then log in.
See [Section 3.2, "Logging Into Mobile Enterprise Applications."](#)
2. The Project Time Entry home screen appears, and by default, displays all of the timecard accounts that have already been used during the current pay period.

Figure 41–1 Project Time Entry Home Screen

To enter project time, you must first select a timecard account or account master. From the Select drop down menu in the Account Search area on the left side of the screen, select one of these options:

- Project Entry - Timecard Accounts

Select this option to display a list of timecard accounts for which time has already been charged to during the specified pay period. You can then select one of the accounts to use when entering your new timecard.

Note that if the timecard account you want to use has not been used previously, it will not appear in this list. To enter a timecard using an account that has not yet been used, you must select the Project Entry - Account Master option.

- Project Entry - Account Master

Select this option to search for project accounts. You can specify filter criteria when you select this option to search for project accounts that are not currently displayed in the list. After entering search criteria, and clicking search, the system displays the list of project accounts that match your criteria. You can then select one of the accounts to use when entering your new timecard.

Note: You can change the Pay Period End Date by tapping the search button and then selecting a new pay period. You might choose to change the pay period if you want to search for accounts that were used on timecards that were entered during a previous pay period.

3. Select a timecard or project account record from the left pane. An add screen then appears on the right side of the screen.

Figure 41–2 Project Time Entry: Add New Timecard

The screenshot displays the 'Project Time Entry' mobile application interface. On the left, there is an 'Account Search' section with a dropdown menu set to 'Project Entry - Account Ma...' and a search bar containing '5100'. Below this is a list of account categories: Retirement Plan (5100.8138), Insurance-Health & Disa (5100.8140), Insurance Worker's Comp (5100.8145), Insurance (5100.8150), Unemployment Taxes (5100.8170), Car Allowance (5100.8177), Sick Expense (5100.8191), Vacation Expense (5100.8192), and Holiday Expense (5100.8193). The right side of the screen shows the 'Timecard Details' form for the selected account '5100 - Potomac Hotel Retirement Plan 5100.8138'. The form includes fields for 'Pay Period End Date', 'Work Date' (set to '-- Select One --'), 'Pay Type' (set to '1 - Regular'), 'Hours' (set to '7'), 'Job Title' (set to 'Administrador'), 'Equipment Worked' (set to '1001'), 'Equipment Hours' (set to '5'), 'Shift Code' (set to '3 - Night Shift'), and a checked 'Offsite Timecard' option. At the bottom, there are 'Clear', 'Save', and 'Submit' buttons.

Note that the selected account appears in the header of the new timecard record on the right side of the screen.

4. Complete the time entry fields on the timecard.

Equipment Worked (Release 9.2 Update)

Enter data in the Equipment Worked field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Equipment Worked field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Equipment Worked field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes."](#)

Note: The Equipment Worked field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Worked field to search and select a piece of equipment.

5. After you complete entering data in the time entry fields on the timecard, tap one of these options:
 - Clear
Tap this option if you want to clear the values on the timecard without saving it.
 - Save
Tap this option if you want to save the timecard, but do not yet want to submit it.
 - Submit
Tap this option if you want to save and submit the timecard for approval.
6. To enter additional timecards for the pay period, repeat steps 2 through 4 in this task.

41.3.2 Entering Non-Project Timecards Using the Mobile Tablet Application

To enter non-project timecards:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications."](#)
2. The Project Time Entry home screen appears, and by default, displays all of the timecard accounts that have already been used during the current pay period.
From the Select drop down menu in the Account Search area on the left side of the screen, select the Non-Project Time Entry option.

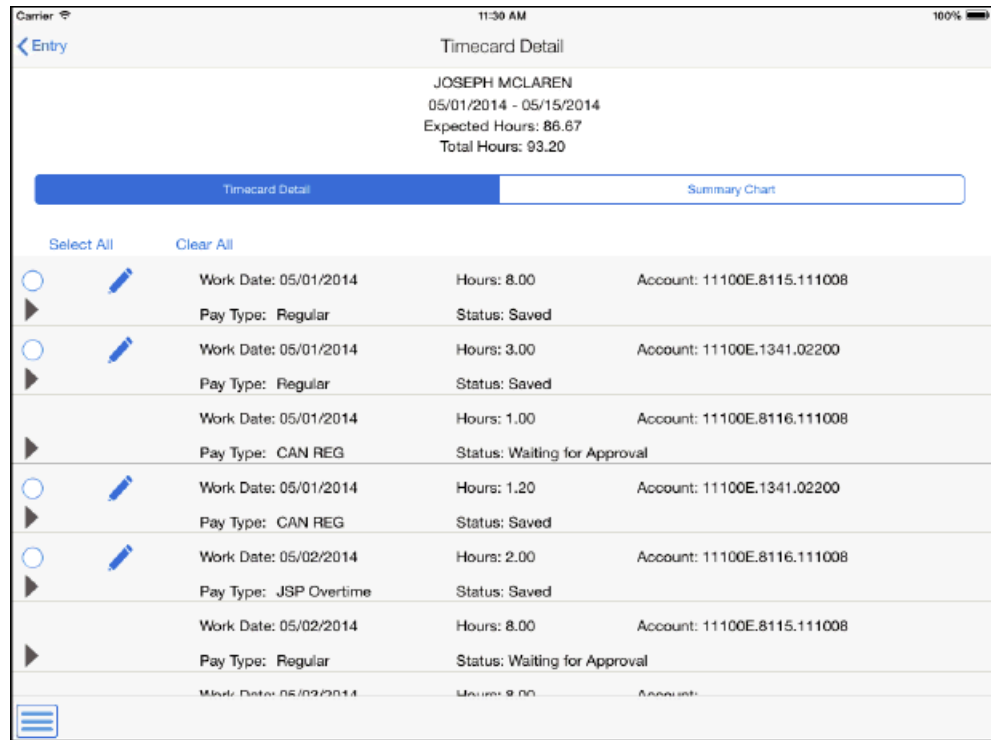
Figure 41–3 Project Time Entry: Non-Project Timecard

The screenshot displays the 'Project Time Entry' screen in a mobile application. At the top, the status bar shows 'Carrier', '11:29 AM', and '100%' battery. The title bar reads 'Project Time Entry' with a 'Timecard Details' link on the right. Below the title, there is a 'Select' dropdown menu currently set to 'Non-Project Time Entry'. The main form area contains several fields: 'Pay Period End Date' with the value '05/15/2014' and a search icon; 'Work Date' with a dropdown menu showing '-- Select One --'; 'Pay Type' with a dropdown menu showing '-- Select One --'; 'Hours' with an empty text input field; and 'Leave Type' with a dropdown menu showing '-- Select One --'. At the bottom of the screen, there is a navigation bar with three buttons: 'Clear', 'Save', and 'Submit'. The Oracle JD Edwards logo is positioned in the bottom left corner of the application area.

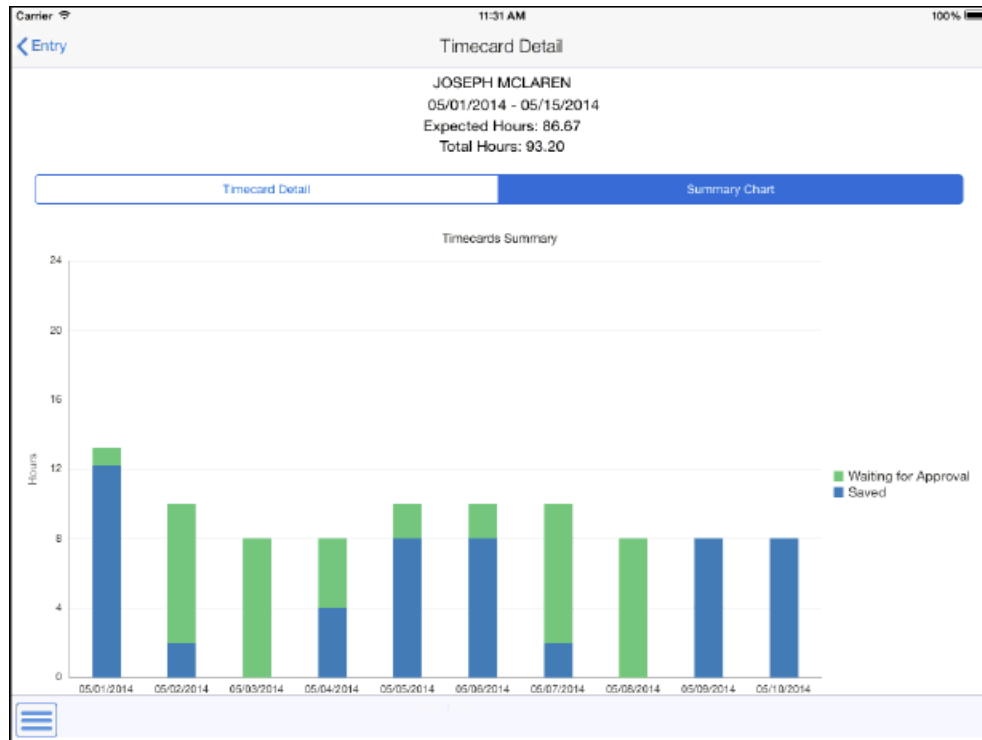
3. Complete the time entry fields on the timecard and then tap one of these options:
 - Clear
Tap this option if you want to clear the values on the timecard without saving it.
 - Save
Tap this option if you want to save the timecard, but do not yet want to submit it.
 - Submit
Tap this option if you want to save and submit the timecard for approval.
4. To enter additional timecards for the pay period, repeat steps 2 and 3 in this task.

41.3.3 Reviewing, Editing, and Submitting Timecards Using the Mobile Tablet Application

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. The Project Time Entry home screen appears, and by default, displays all of the timecard accounts that have already been used during the current pay period.
3. To view the details of the timecards that have already been entered for the pay period, tap the Timecard Details button at the top right of the screen.
4. On the Timecard Details screen, review the list of timecards for the pay period. You can tap the arrow on the left side of the record to display additional details.

Figure 41–4 Timecard Detail

5. To edit a timecard, tap the pencil icon. If the timecard is at a status that enables you to update it, you can make changes, and then tap the Save or Submit button. If the timecard is at a status that does not allow you to update it, the fields are read-only, and the timecard cannot be changed.
6. To select timecards for submission, tap the circle on the left side of the record(s) you want to select, or tap the Select All button. After selecting one or more timecards, tap the Submit button at the top right of the screen. The submit button appears only after you have selected one or more timecards.
7. To delete timecards, select one or more records and then tap the Delete button at the bottom right of the screen.
8. To view a summary chart of the timecards in the pay period, tap the Summary Chart tab.

Figure 41–5 Summary Chart

41.4 Using the Project Time Entry Mobile Smartphone Application (M51048)

The Project Time Entry smartphone application enables you to enter, review, update, and submit project and non-project timecards for a selected pay period.

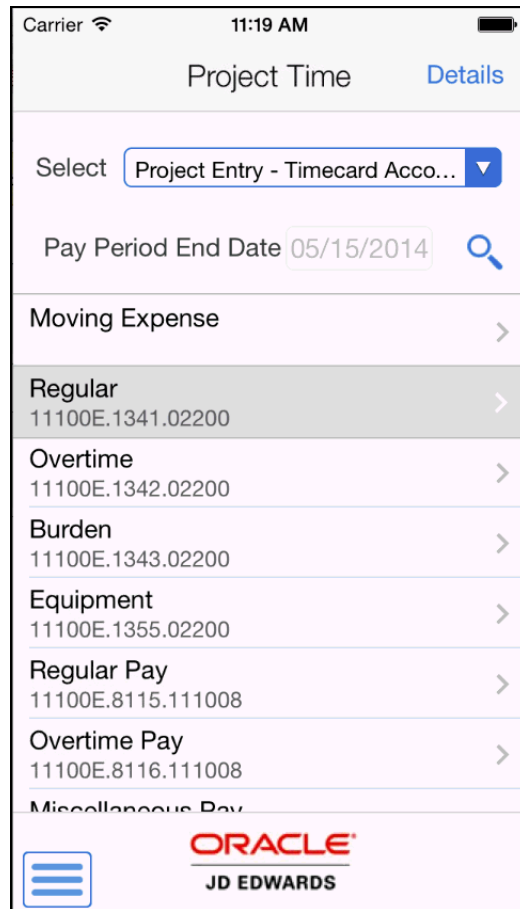
Before you can use the application, you must download the application from the application store, and install it on your device.

To open the application, tap the Project Time Entry icon and log in.

41.4.1 Entering Project Timecards Using the Mobile Smartphone Application

To enter project timecards:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications."](#)
2. The Project Time home screen appears, and by default, displays all of the timecard accounts for which time has already been charged to during the current pay period.

Figure 41–6 Project Time Home Screen

To enter project time, you must first select a timecard account or account master. From the Select drop down menu, select one of these options:

- Project Entry - Timecard Accounts

Select this option to display a list of timecard accounts for which time has already been charged to during the specified pay period. You can then select one of the accounts to use when entering your new timecard.

Note that if the timecard account you want to use has not been used previously, it will not appear in this list. To enter a timecard using an account that has not yet been used, you must select the Project Entry - Account Master option.

- Project Entry - Account Master

Select this option to search for project accounts. You can specify filter criteria when you select this option to search for project accounts that are not currently displayed in the list. After entering search criteria, and clicking search, the system displays the list of project accounts that match your criteria. You can then select one of the accounts to use when entering your new timecard.

Note: You can change the Pay Period End Date by tapping the search button and then selecting a new pay period. You might choose to change the pay period if you want to search for accounts that were used on timecards that were entered during a previous pay period.

3. Select an account record from the left pane. An add screen then appears on the right side of the screen.

Figure 41–7 Timecard Detail

Carrier 2:42 PM

Project Time

5100 - Potomac Hotel
Overtime
5100.1342.02200

• Pay Period End Date 03/31/17

• Work Date -- Select One --

• Pay Type -- Select One --

• Hours 5

Job Title Acceptance

Equipment Worked 4554

Equipment Hours 4

Clear Save

4. Complete the time entry fields on the timecard.

Equipment Worked (Release 9.2 Update)

Enter data in the Equipment Worked field using one of these options:

- Use the keyboard on your mobile device to manually enter the data. Alternately, you can tap the search and select button to search and select a piece of equipment.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Equipment Worked field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Equipment Worked field to activate the scanning device. Then, scan the barcode of the equipment using the scanning device.

See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Note: The Equipment Worked field is designed to accept the asset that you identify with an identification symbol in the Fixed Assets Constants program (P001012).

See Setting Up Fixed Asset Constants in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide.

For example, if the symbol to identify the serial number is "/" and the serial number is "4CE0460D0G"; then you need to enter "/4CE0460D0G" in the Equipment Worked field to search and select a piece of equipment.

5. After you complete entering data in the time entry fields on the timecard, tap one of these options:
 - Save
Tap this option if you want to save the timecard.
 - Cancel
Tap this option if you want to clear the timecard without saving any of the entered values.
 - Submit
Tap this option if you want to save and submit the timecard for approval.
6. To enter additional timecards for the pay period, repeat steps 2 through 4 in this task.

41.4.2 Entering Non-Project Timecards Using the Mobile Smartphone Application

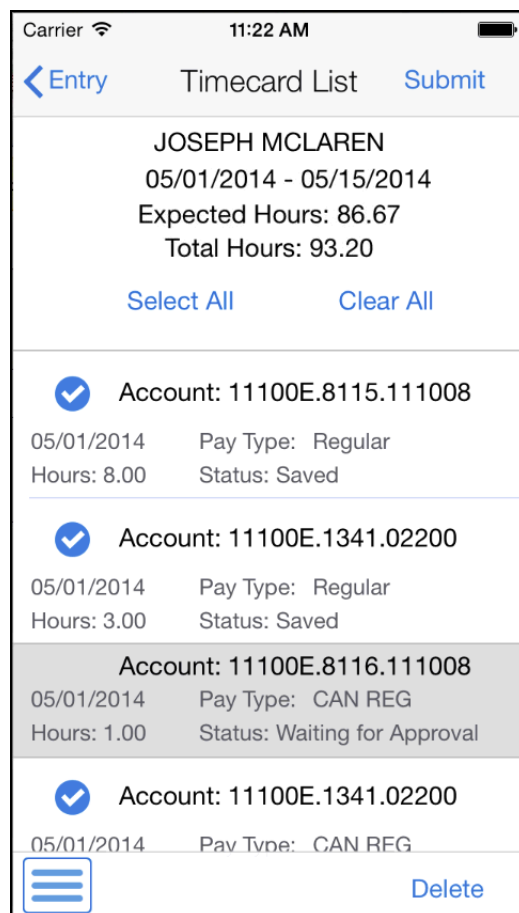
To enter non-project timecards:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. The Project Time Entry home screen appears, and by default, displays all of the timecard accounts for which time has already been charged to during the current pay period.
From the Select drop down menu select the Non-Project Time Entry option.
3. Complete the time entry fields on the timecard and then tap one of these options:
 - Save
Tap this option if you want to save the timecard.
 - Cancel
Tap this option if you want to clear the timecard without saving any of the entered values.
 - Submit
Tap this option if you want to save and submit the timecard for approval.
4. To enter additional timecards for the pay period, repeat steps 2 and 3 in this task.

41.4.3 Reviewing, Editing, and Submitting Timecards Using the Mobile Smartphone Application

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. The Project Time Entry home screen appears, and by default, displays all of the timecard accounts for which time has already been charged to during the current pay period.
3. To view the details of the timecards that have already been entered for the pay period, tap the Details button at the top right of the screen.
4. On the Timecard List screen, review the list of timecards for the pay period.

Figure 41–8 Timecard List



5. To edit a timecard, tap the timecard record. If the timecard is at a status that enables you to update it, you can make changes, and then tap the Save or Submit button. If the timecard is at a status that does not allow you to update it, the fields are read-only, and the timecard cannot be changed.
6. To select timecards for submission, tap the circle on the left side of the record(s) you want to select, or tap the Select All button. After selecting one or more timecards, tap the Submit button at the top right of the screen. The submit button appears only after you have selected one or more timecards.

7. To delete timecards, select one or more records and then tap the Delete button at the bottom right of the screen.

Part VII

Supply Chain Management and Manufacturing

This part contains the following chapters:

- [Chapter 42, "Customer Order Overview Mobile Applications"](#)
- [Chapter 43, "Inventory Availability Mobile Applications"](#)
- [Chapter 44, "Product Price and Availability Mobile Applications"](#)
- [Chapter 45, "Quote Review and Release Mobile Applications"](#)
- [Chapter 46, "Sales Held Order Release Mobile Applications"](#)
- [Chapter 47, "Sales Order Counts Mobile Applications"](#)
- [Chapter 48, "Order Entry Mobile Application"](#)
- [Chapter 49, "Search Sales Order Mobile Applications"](#)
- [Chapter 50, "Warehouse Availability Mobile Application"](#)

Customer Order Overview Mobile Applications

This chapter discusses these topics:

- [Section 42.1, "Customer Order Overview Mobile Applications Overview"](#)
- [Section 42.2, "Setting Up the Customer Order Overview Mobile Applications"](#)
- [Section 42.3, "Using the Customer Order Overview Mobile Tablet Application \(M420030\)"](#)
- [Section 42.4, "Using the Customer Order Overview Mobile Smartphone Application \(M420031\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- *Understanding Sales Order Entry in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.*
 - *Releasing Backorders Online in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.*
 - *Understanding Quote Order Release in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.*
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-

42.1 Customer Order Overview Mobile Applications Overview

You use the Customer Order Overview mobile applications to review customer orders on your mobile devices. The information available for review includes the selected customer's:

- Customer order header information, including order number, branch/plant and order date.
- Customer order counts, including counts for backorders, held orders, open orders and quote orders.
- Customer order detail information, including quantity, unit price, last status, next status, ship to, requested date, promised delivery date and scheduled pick date.
- Contact information, which includes names, phone numbers, email addresses, and addresses.

Additionally, you can use the Customer Order Overview mobile applications to:

- View customer address information.
- View customer contacts.
- Add customer contact information to your device.
- Use mapping and navigation features of your device to locate the customer site.
- Send e-mail messages to customer contacts.
- Call customer contacts (smartphone only).

This table lists the applications that are available to review customer order information:

Type of Application	Additional Information
Base EnterpriseOne application	Use these applications in the JD Edwards EnterpriseOne system to review customer order information: <ul style="list-style-type: none"> ■ Sales Order Entry (P42101) ■ Work With Backorders (P42117) ■ Work With Held Orders (P43070) ■ Work With Order Blanket Release (P420111)
Tablet application	Mobile Customer Order Overview - Tablet (M420030) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Customer Order Overview
Smartphone application	Mobile Customer Order Overview - Phone (M420031) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Customer Order Overview

Before using the Customer Order Overview tablet or smartphone application, you must perform the following setup tasks:

- Set the processing options for the mobile applications.
Complete this task in the EnterpriseOne system.
- Validate the customer search type.
Complete this task in the EnterpriseOne system.
- Set field display preferences.
Complete this task in the EnterpriseOne system.
- Set the privacy settings for contacts on your iOS device to determine whether you can add contacts from the application directly to the contacts on your device.
Complete this task using the iOS mobile devices.
This button is enabled by default in Android devices.

42.2 Setting Up the Customer Order Overview Mobile Applications

The Customer Order Overview mobile applications search for customer order information in the EnterpriseOne database. Before using the Customer Order

Overview mobile applications (M420030 and M420031), you must set up the processing options of the applications in the JD Edwards EnterpriseOne system. You use the processing options to specify the versions of the programs that the system uses to process customer order data for the mobile applications.

In addition to verifying the versions used to process correct customer order data, you can also set up user preferences within the mobile applications. These preferences enable you to show or hide the following fields in the mobile application:

- Function Code
- Type Code
- Contact Type

You can also set the privacy settings on your iOS device to enable the Create Device Contact feature, which enables you to add an EnterpriseOne contact to your device contacts.

To access the privacy settings on an iOS device:

1. Select Settings, then select Privacy, then select Contacts.
2. Enable the option for all applications that you want to have access to your device contacts.

This button is enabled by default in Android devices.

42.2.1 Setting Processing Options for the Customer Order Overview Mobile Tablet Application (M420030)

You use processing options to specify default processing information for a program.

42.2.1.1 Versions

1. Customer Master (P03013) Version

Use this processing option to specify which version of the Customer Master program (P03013) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

2. Address Book (P01012) Version

Use this processing option to specify which version of the Address Book program (P01012) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

3. Contact Information (P01111) Version

Use this processing option to specify which version of the Contact Information program (P01111) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

4. Sales Quote (P420111) Version

Use this processing option to specify which version of the Sales Quote program (P420111) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

5. Held Order Release (P43070) Version

Use this processing option to specify which version of the Held Order Release program (P43070) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

6. Backorder Release (P42117) Version

Use this processing option to specify which version of the Backorder Release program (P42117) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

7. Sales Order Entry (P42101) Version

Use this processing option to specify which version of the Sales Order Entry program (P42101) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

8. Sales Order Entry (P4210) Version

Use this processing option to specify which version of the Sales Order Entry program (P4210) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

9. User Defined Codes (P0004A) Version

Use this processing option to specify which version of the User Defined Codes program (P42101) the system uses. To process customer orders, the Customer Order Overview mobile tablet application (M420030) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

42.2.2 Setting Processing Options for the Customer Order Overview Mobile Smartphone Application (M420031)

You use processing options to specify default processing information for a program.

42.2.2.1 Versions

1. Customer Master (P03013) Version

Use this processing option to specify which version of the Customer Master program (P03013) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

2. Address Book (P01012) Version

Use this processing option to specify which version of the Address Book program (P01012) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

3. Contact Information (P01111) Version

Use this processing option to specify which version of the Contact Information program (P01111) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of

the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

4. Sales Quote (P420111) Version

Use this processing option to specify which version of the Sales Quote program (P420111) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

5. Held Order Release (P43070) Version

Use this processing option to specify which version of the Held Order Release program (P43070) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

6. Backorder Release (P42117) Version

Use this processing option to specify which version of the Backorder Release program (P42117) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

7. Sales Order Entry (P42101) Version

Use this processing option to specify which version of the Sales Order Entry program (P42101) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

8. Sales Order Entry (P4210) Version

Use this processing option to specify which version of the Sales Order Entry program (P4210) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

9. User Defined Codes (P0004A) Version

Use this processing option to specify which version of the User Defined Codes program (P42101) the system uses. To process customer orders, the Customer Order Overview mobile smartphone application (M420031) uses the processing options of the version that you specify. If you leave this processing option blank, the system uses ZJDE0001.

42.3 Using the Customer Order Overview Mobile Tablet Application (M420030)

The Customer Order Overview tablet application enables you to review open orders, backorders, held orders and quote orders for customers. You can view order header and detail information for customer orders, enter notes, and review previous notes.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the CUST ORDERS icon and log in.

42.3.1 Reviewing Customer Orders Using Customer Order Overview Mobile Tablet Application (M420030)

To review customer orders:

1. Open the application by tapping the CUST ORDERS icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

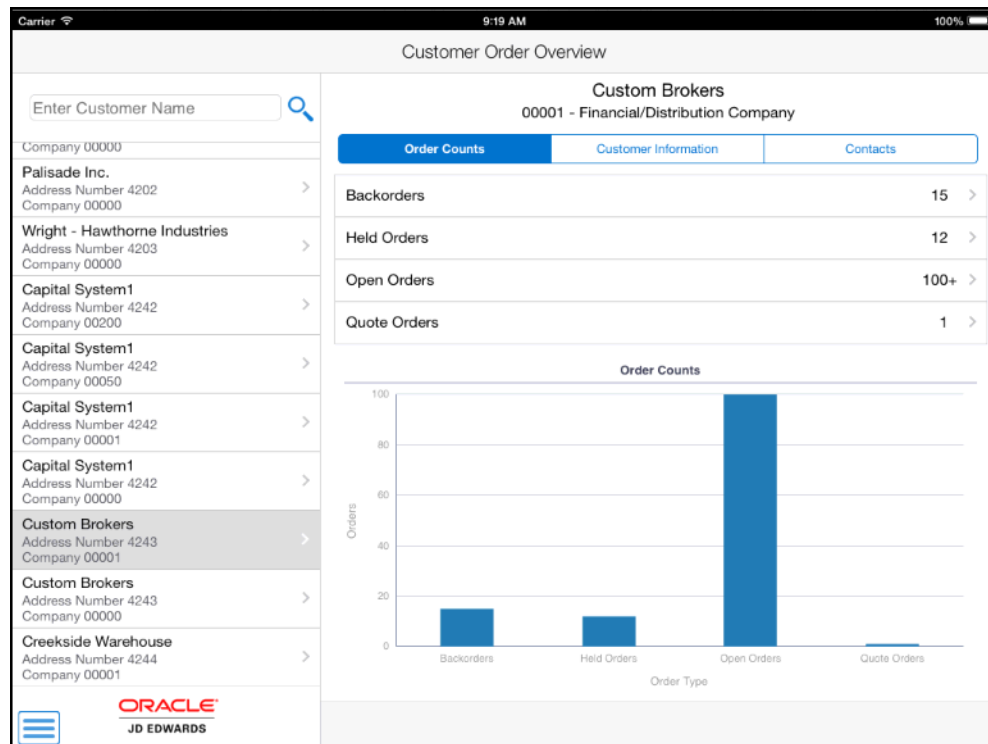
2. From the Customer Order Overview home screen, enter the customer name partially or in whole in the Enter Customer Name field to narrow the search to a specific customer. Then, tap the Search button next to the Enter Customer Name field to search for specific customers.

The system displays a list of customers you searched for.

3. Tap a customer name from the list to view the respective order details.

The system displays customer information in the header and three tabs: Order Counts, Customer Information and Contacts.

Figure 42–1 Customer Order Overview: Home Screen



On the Order Counts tab, the system displays the number of backorders, held orders, open orders and quote orders for the selected customer.

4. To view customer information such as customer address, phone number and email address, tap the Customer Information tab.

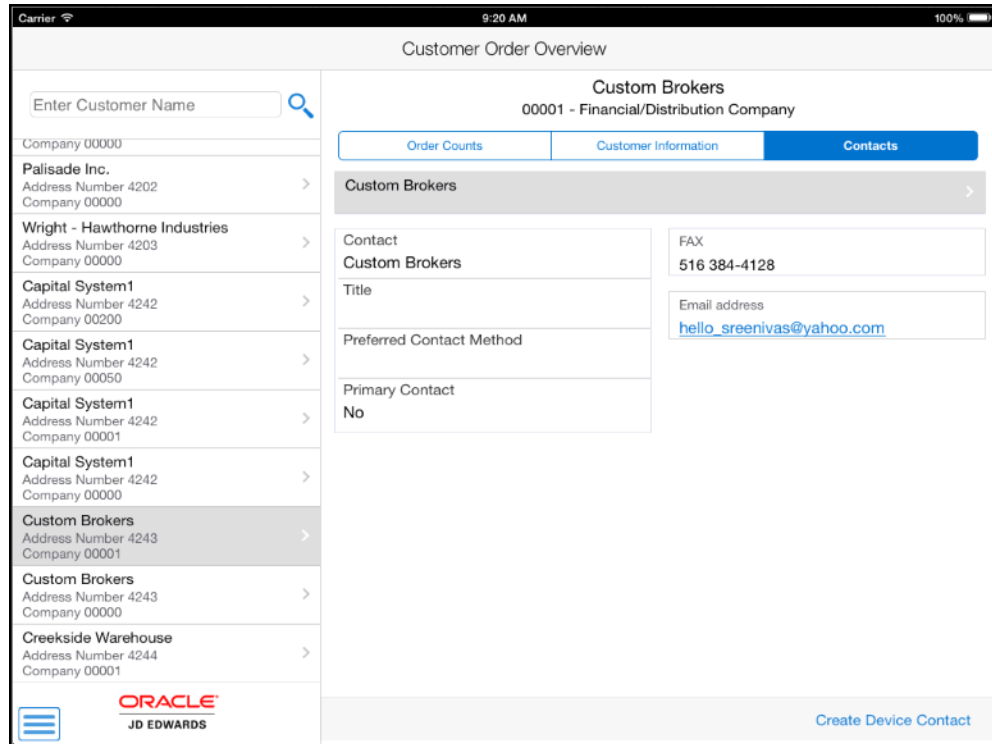
Figure 42–2 Customer Order Overview: Customer Information tab

The screenshot displays the 'Customer Order Overview' interface on a mobile device. At the top, the status bar shows 'Carrier', '9:19 AM', and '100%' battery. The main title is 'Customer Order Overview'. Below the title, there is a search bar labeled 'Enter Customer Name' with a magnifying glass icon. A list of customer entries is shown on the left, including 'Palisade Inc.', 'Wright - Hawthorne Industries', 'Capital System1', and 'Custom Brokers' (which is selected and highlighted). The right side of the screen shows the 'Customer Information' tab for 'Custom Brokers 00001 - Financial/Distribution Company'. This tab has three sub-sections: 'Order Counts', 'Customer Information', and 'Contacts'. The 'Customer Information' section displays the customer's address: '2001 Northern Boulevard', 'ship to line 2', 'Custom Brokers', 'ship to line 3', '123', and 'Manhasset NY 11030'. The 'Email address' section shows 'hello_sreenivas@yahoo.com'. The 'FAX' section shows '516 384-4128'. At the bottom, the Oracle JD Edwards logo is visible.

To use the device's map and navigational features, tap the data in the Customer Address section of the form.

To contact the customer, tap the email address in the Email section of the form.

5. To view contact information for the selected customer, tap the Contacts tab. The device displays a list of contacts associated with the customer.

Figure 42-3 Customer Order Overview: Contacts Tab

On this screen, you can tap the e-mail address to compose an email to the customer.

- To view order details, tap a row displaying the count of backorders, open orders, held orders or quote orders on the Order Counts tab. You can also view order details by tapping the bar segments on the Order Counts tab.

To view a list of backorders for the selected customer, tap the Backorders row. The system displays the order details for the first backorder from the list.

To filter backorders, tap the filter icon. To filter orders, enter values in the filter fields and tap Apply.

In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of backorders that are displayed based on your filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

The system displays backorder information in three tabs: Order Header, Order Details and Notes.

Figure 42–4 Customer Order Overview: Backorders

The screenshot shows a mobile application interface for 'Backorders Custom Brokers'. At the top, it displays '1976-SO-00001' and '00001 - Financial/Distribution Company'. Below this are three tabs: 'Order Header', 'Order Details', and 'Notes'. The 'Order Header' tab is active, showing 'Branch Plant 30 - Desc BU 30', 'Sold To - Custom Brokers', 'Order Date 03/26/2013', and 'Customer PO'. Below the header are two address sections: 'Sold To Address' and 'Ship To Address', both listing 'Capital System', '60 E Ring Rd', 'DENVER CO', and 'US'. On the left side, there is a list of backorders with columns for Order Number, Order Type, and Requested Date. The Oracle JD Edwards logo is at the bottom left.

To use the device's map and navigational features, tap the data in the Sold To Address and Ship To Address sections of the form.

7. To view order details, tap the Order Details tab.

The system displays Branch Plant, Sold To, Order Date, Customer PO from the order header and Quantity, Unit Price, Currency Code, Last Status, Next Status, Ship To, Line Number, Requested Date, Promised Delivery Date, Scheduled Pick Date in the order details.

8. To add or review notes, tap the Notes tab.

You can review previous notes in the Notes History section of the form. To add a new note, tap in the Enter New Note section, and enter the text. To save the note, tap Save.

9. Similarly, you can view order details of held orders, open orders and quote orders. To view backorder details, held order details, or quote order details for the selected customer, tap the dropdown menu in the top left of the screen.

Note: Depending on the order type, the system displays different sets of values.

10. To review held order details, tap the drop down menu in the top left of the screen and select Held Orders.

The system displays Branch Plant, Sold To, Order Date, Hold Code, Person Responsible, Customer PO from the order header and Quantity, Extended Price, Currency Code, Last Status, Next Status, Ship To, Line Number, Requested Date, Promised Delivery Date in the order details.

11. To review open order details, tap the drop down menu in the top left of the screen and select Open Orders.

The system displays Branch Plant, Sold To, Order Date, Order Total, Currency Code, Customer PO from the order header and Quantity, Unit Price, Extended Price, Currency Code, Last Status, Next Status, Ship To, Line Number, Requested Date, Promised Delivery Date, Scheduled Pick Date in the order details.
12. To review quote order details, tap the drop down menu in the top left of the screen and select Open Orders.

The system displays Branch Plant, Sold To, Order Date, Currency Code, Customer PO from the order header and Quantity, Unit Price, Extended Price, Currency Code, Ship To, Line Number, Requested Date in the order details.
13. Tap the Create Device Contact button to add the contact record to your device contacts. If the contact does not already exist, the system adds the contact to your device and displays a confirmation message, Contact Added. If the contact already exists, the system does not update anything, and returns a message, Contact Exists.

Note that the Create Device Contact button is displayed only if the device settings are set to enable the application to access the contact information for the device.
14. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

42.4 Using the Customer Order Overview Mobile Smartphone Application (M420031)

The Customer Order Overview smartphone application enables you to review open orders, backorders, held orders and quote orders for customers. You can view order header and detail information for customer orders, enter notes, and review previous notes.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the CUST ORDERS icon and log in.

42.4.1 Reviewing Customer Orders Using Customer Order Overview Mobile Smartphone Application (M420031)

To review customer orders:

1. Open the application by tapping the CUST ORDERS icon on your device, and then log in.

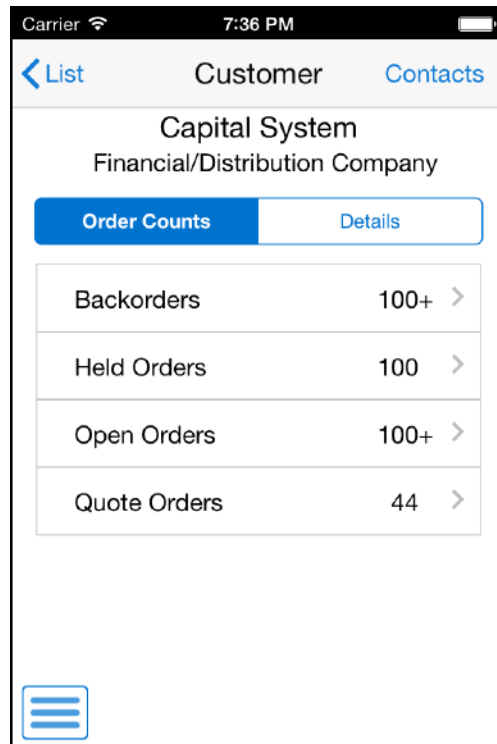
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. From the Customer Order Overview home screen, enter the customer name partially or in whole in the Enter Customer Name field to narrow the search to a specific customer. Then, tap the Search button next to the Enter Customer Name field to search for specific customers.

The system displays a list of customers you searched for.

3. Tap a customer name from the list to view the respective order details.

The system displays customer information in the header and two tabs: Order Counts and Details.

Figure 42–5 Customer Order Overview: Customer Screen - Smartphone

On the Order Counts tab, the system displays the number of backorders, held orders, open orders and quote orders for the selected customer.

To view customer information such as customer address, phone number and email address, tap the Details tab.

To view contact information for the selected customer, tap the Contacts button. The device displays a list of contacts associated with the customer.

4. On the Order Counts tab, tap a row displaying the count of backorders, open orders, held orders or quote orders to view order details.

To view a list of backorders for the selected customer, tap the Backorders row.

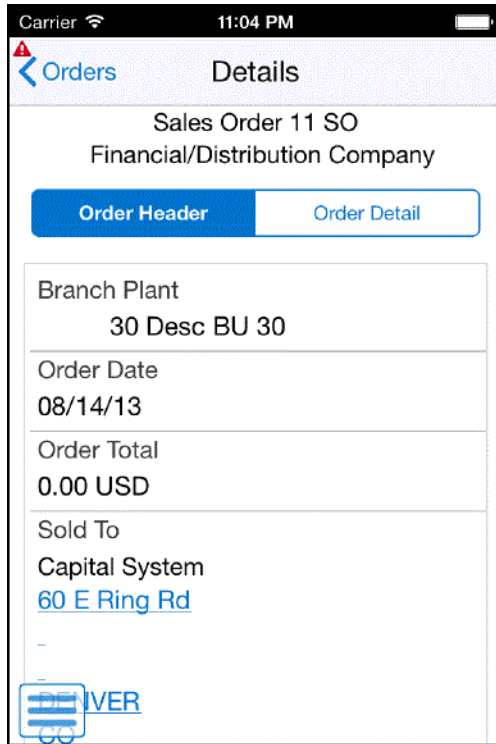
To filter backorders, tap the filter icon. To filter orders, enter values in the filter fields and tap Apply.

In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of backorders that are displayed based on your filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

The system displays backorder information in two tabs: Order Header and Order Details.

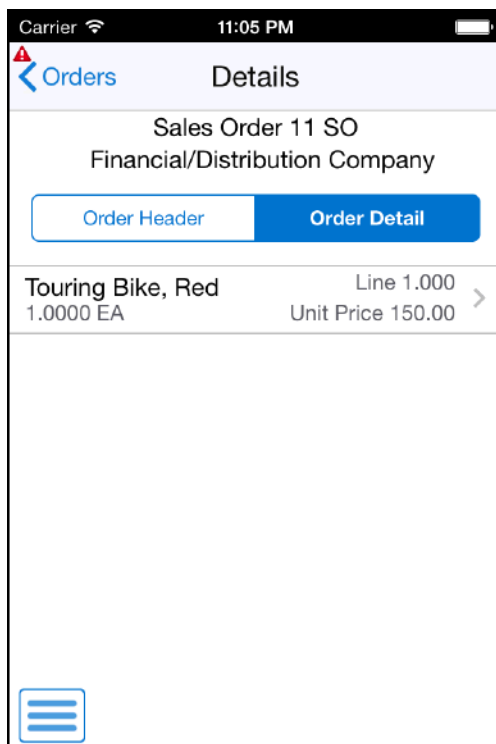
Figure 42–6 Customer Order Overview: Backorders



To use the device's map and navigational features, tap the data in the Sold To Address and Ship To Address sections of the form.

5. To view order details, tap the Order Detail tab.

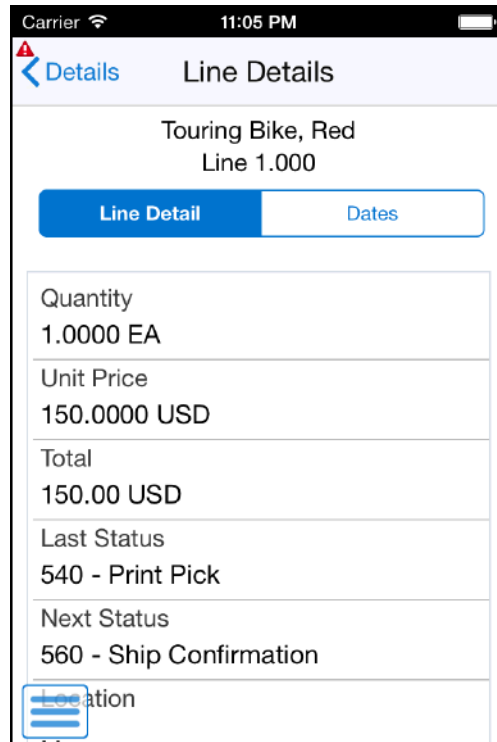
Figure 42–7 Customer Order Overview: Order Detail tab



The system displays different order detail lines. To check line details, tap an order line.

The system displays order details in two tabs: Line Detail and Dates.

Figure 42–8 Customer Order Overview: Line Detail tab



The system displays order detail information including Quantity, Unit Price, Last Status, Next Status, and Location under the Line Detail tab.

The system displays Requested Date, Scheduled Pick Date, Promised Ship Date, Actual Ship Date, Promised Delivery Date and Price Effective Date under the Dates tab.

6. Similarly, you can view order details of held orders, open orders and quote orders. To view backorder details, held order details, or quote order details for the selected customer, tap the dropdown menu on the Orders screen.
7. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Inventory Availability Mobile Applications

This chapter discusses these topics:

- [Section 43.1, "Inventory Availability Mobile Applications Overview"](#)
- [Section 43.2, "Setting Up the Inventory Availability Mobile Applications"](#)
- [Section 43.3, "Reviewing Inventory Availability Using a Mobile Tablet Application"](#)
- [Section 43.4, "Reviewing Inventory Availability Using a Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Locating Quantity Information" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.
-
-

43.1 Inventory Availability Mobile Applications Overview

You use the Inventory Availability mobile applications to review inventory information including item, lot/serial number, location, unit of measure and quantity information.

You use Inventory availability information to determine the current and future inventory needs. Using the Inventory Availability mobile applications, you can:

- Review information about items including lot/serial number, location and unit of measure.
- Access summary information about on-hand, committed, and available items.
- Access and monitor supply-and-demand information to help you plan for future stocking needs.

This table lists the types of quantity calculations the system performs:

Calculation	Description
On-hand	Reflects the total number of items in a particular branch/plant.

Calculation	Description
Commitments	This calculation includes soft commitments, hard commitments, and quantities on work orders.
On receipt	Reflects quantities that are on open purchase orders.
Available	Defines how the system performs this calculation. Typically, it includes on-hand quantities minus any outstanding commitments, reservations, and backorders.

This table lists the applications that are available to review inventory availability information:

Type of Application	Additional Information
Base EnterpriseOne application	Use these applications in the JD Edwards EnterpriseOne system to review inventory availability: <ul style="list-style-type: none"> ■ Work With Item Availability (P41202) ■ User Defined Codes (P0004A) ■ Default Location & Printers (P400951) ■ Item Branch (P41026) ■ Location Search and Select (P41LOCN)
Tablet application	Inventory Availability (M41205) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Inventory Availability
Smartphone application	Inventory Availability (M41207) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Inventory Availability

Note: The Inventory Availability mobile applications do not support apparel/attribute style items. For more information on inventory availability for apparel/attribute style items, see "Reviewing Item Availability for Style Items" in the *JD Edwards EnterpriseOne Applications Apparel Management Implementation Guide*.

Before using the Inventory Availability tablet or smartphone application, you must perform the following setup tasks:

- Set the processing options for both applications.
Complete this task in the EnterpriseOne system.

43.1.1 Differences and Limitations: Inventory Availability

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Inventory Availability Information Displayed

While the Inventory Availability mobile applications do not function differently than base EnterpriseOne applications, they do offer the mobile user a subset of availability

information. Not all availability information available in the base software is available in the mobile applications.

Barcode Scanning (Release 9.1 Update)

The Inventory Availability mobile applications are designed to scan data for item number, location, and lot/serial number. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. These applications do not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Barcode scanning using the Inventory Availability tablet application (M41205) is supported only for Android devices. You cannot scan barcodes if you are using the Inventory Availability tablet application in an iOS device.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

43.2 Setting Up the Inventory Availability Mobile Applications

Before using the Inventory Availability mobile applications, you

- Set processing options for the Inventory Availability mobile applications (M41205 and M41207).

Setting processing options for these applications is a task that should be completed by the system administrator before the mobile applications are made available to end users.

- (Release 9.1 Update) Disable the Bluetooth option in your device's settings if you want to use the native device camera to scan barcodes of item number, location, and lot/serial number. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device on the mobile device.

43.2.1 Setting Processing Options for the Inventory Availability Tablet Application

You use processing options to specify default processing information for a program.

43.2.1.1 Versions

1. Item Branch (P41026) Version

Use this processing option to specify the version of the Item Branch program (P41026) that the mobile application uses to process inventory availability information. If this option is left blank, the system uses version ZJDE0001.

2. Item Availability (P41202) Version

Use this processing option to specify the version of the Item Availability program (P41202) that the mobile application uses to process inventory availability information. If this option is left blank, the system uses version ZJDE0001.

43.2.2 Setting Processing Options for the Inventory Availability Smartphone Application

You use processing options to specify default processing information for a program.

43.2.2.1 Versions

1. Item Branch (P41026) Version

Use this processing option to specify the version of the Item Branch program (P41026) that the mobile application uses to process inventory availability information. If this option is left blank, the system uses version ZJDE0001.

2. Item Availability (P41202) Version

Use this processing option to specify the version of the Item Availability program (P41202) that the mobile application uses to process inventory availability information. If this option is left blank, the system uses version ZJDE0001.

43.2.3 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes

You can use the Item Number, License Plate Number, Location, and Lot/Serial Number fields to filter warehouse records. To enter data in these fields, you have three options. You can:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note that when you enable the Bluetooth option in your device settings, the system locks the keyboard; you can use the keyboard only after you disable the Bluetooth option.

Note: Barcode scanning using the Inventory Availability tablet application (M41205) is supported only for Android devices. You cannot scan barcodes if you are using the Inventory Availability tablet application in an iOS device.

43.3 Reviewing Inventory Availability Using a Mobile Tablet Application

The Inventory Availability tablet application enables you to review inventory availability information about each item based on the item number and branch/plant.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the INV AVAIL icon and log in.

43.3.1 Reviewing Inventory Availability Using a Mobile Tablet Application (M41205)

To review inventory availability:

1. Open the application by tapping the INV AVAIL icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. Enter a value in the Enter Item Description field, and tap the Search button.
3. To filter records by branch plant and item number, tap the filter icon.

Branch Plant

To add a branch plant to your search criteria, enter the address book number of the branch plant in the field.

Item Number (Release 9.1 Update)

Enter data in the Item Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Item Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Item Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 43.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of items that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

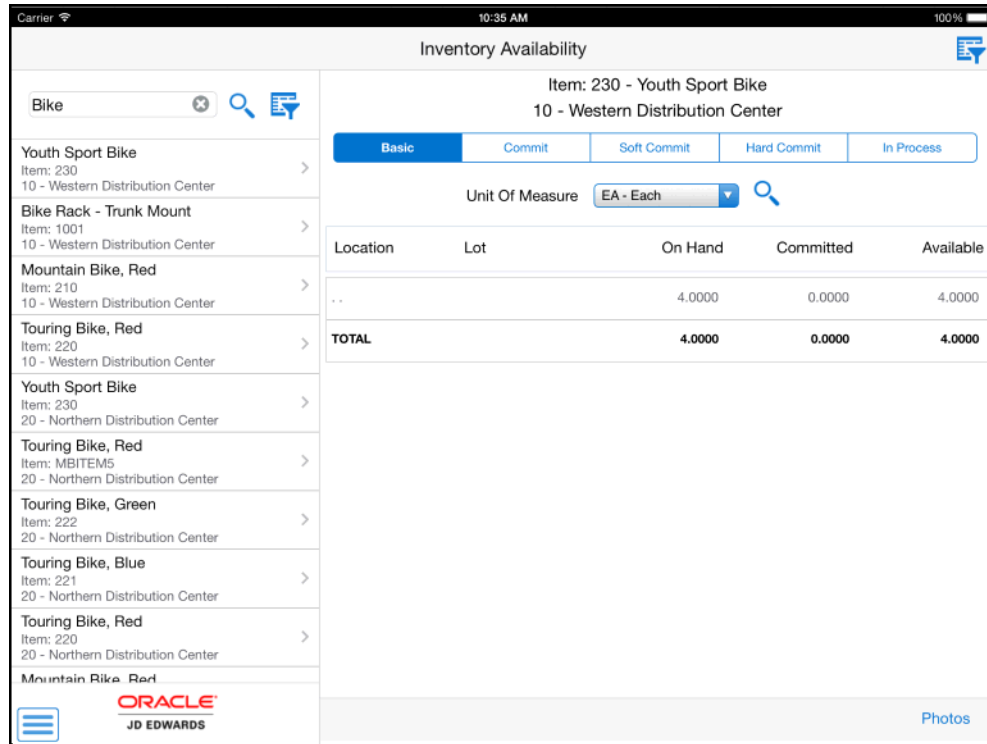
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of items associated with the last saved filter values, if applicable.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system displays inventory availability information in five tabs: Basic, Commit, Soft Commit, Hard Commit and In Process.

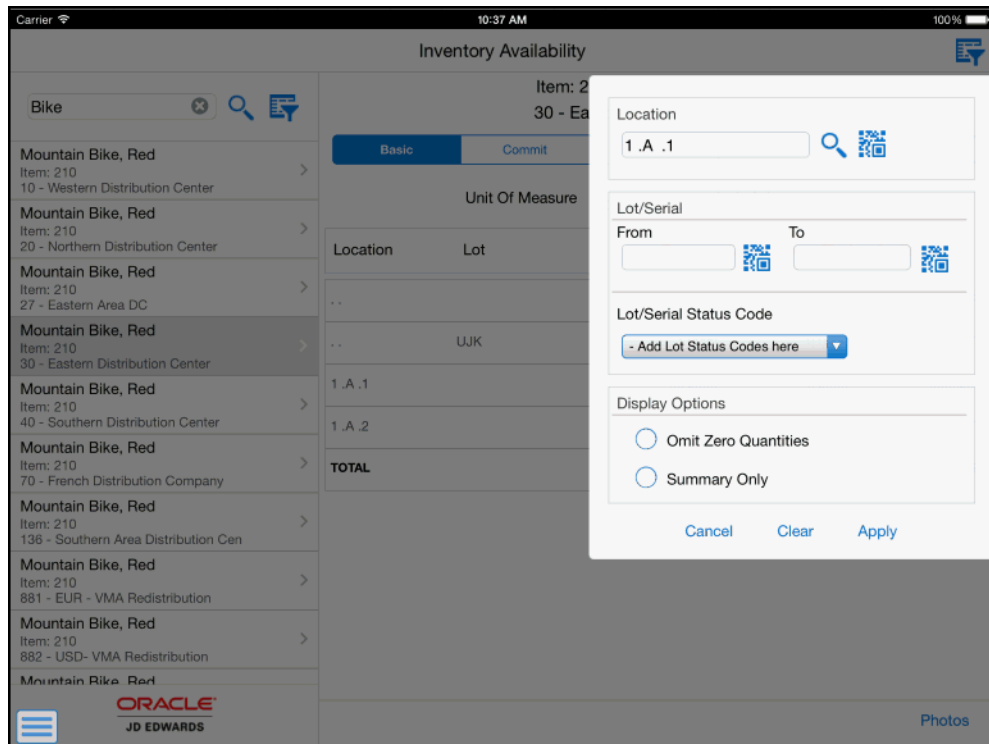
Figure 43–1 Inventory Availability: Basic tab - Tablet



Note: If you search for inventory availability for a dual item, the system displays only four tabs when you select the secondary unit of measure: Basic, Commit, Soft Commit and Hard Commit.

The system displays location, lot, available quantity, on hand quantity and committed quantity values on the Basic tab.

6. You review committed quantity information on the Commit tab. The system displays back order, future commit and on receipt quantity information.
7. To review soft committed quantity information, tap the Soft Commit tab. The system displays sales/work order, work order and on-purchase order quantity information.
8. To review hard committed quantity information, tap the Hard Commit tab. The system displays sales order, work order and project quantity information.
9. To review in-process quantity information, tap the In Process tab. The system displays in-inspection, in-routing and in-transit quantity information.
10. To define filter criteria, tap the Filter button in the top right of the screen.

Figure 43–2 Inventory Availability: Availability Filters - Tablet

You can filter records based on location, a range of lot/serial numbers and lot/serial status code.

(Release 9.1 Update) To filter by location and range of lot/serial numbers, you populate data in the Location and Lot/Serial Number fields using one of these three options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Location and the Lot/Serial number field. The system launches the device camera and you can scan the barcode of the location and the lot/serial number.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Location and the Lot/Serial number field to activate the scanning device. Then, scan the barcode of the location and lot/serial number using the scanning device.

You can review only the summary quantity information by selecting the Summary Only option. You can omit zero quantities by selecting the Omit Zero option.

11. To view item photos, tap the Photos button.
12. To log out of the application, tap the Menu button in the bottom left of the screen, and then tap Logout.

43.4 Reviewing Inventory Availability Using a Mobile Smartphone Application

To review inventory availability:

1. Open the application by tapping the INV AVAIL icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. Enter a value in the Enter Item Description field, and tap the Search button.
3. To filter records by branch plant and item number, tap the filter icon.

Branch Plant

To add a branch plant to your search criteria, enter the address book number of the branch plant in the field.

Item Number (Release 9.1 Update)

Enter data in the Item Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Item Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Item Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 43.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of items that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

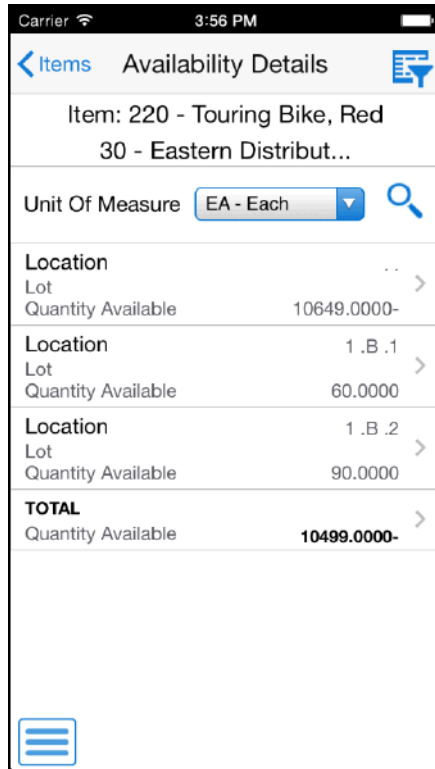
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of items associated with the last saved filter values, if applicable.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system displays a list of items depending on your search criteria.
Tap a record to view availability information.
6. The system displays summary availability information.

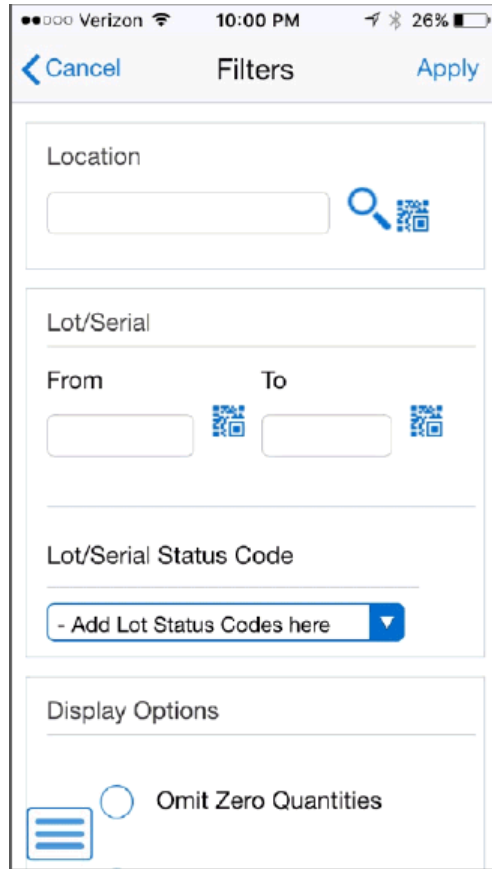
Figure 43-3 Inventory Availability: Availability Details - Smartphone



The system displays available quantity for different location-lot combinations and also the total quantity available.

7. To define filter criteria, tap the filter icon in the top right of the screen.

Figure 43–4 Inventory Availability: Availability Filters - Smartphone



You can filter records based on location, a range of lot/serial numbers and lot/serial status code.

(Release 9.1 Update) To filter by location and range of lot/serial numbers, you populate data in the Location and Lot/Serial Number fields using one of these three options:

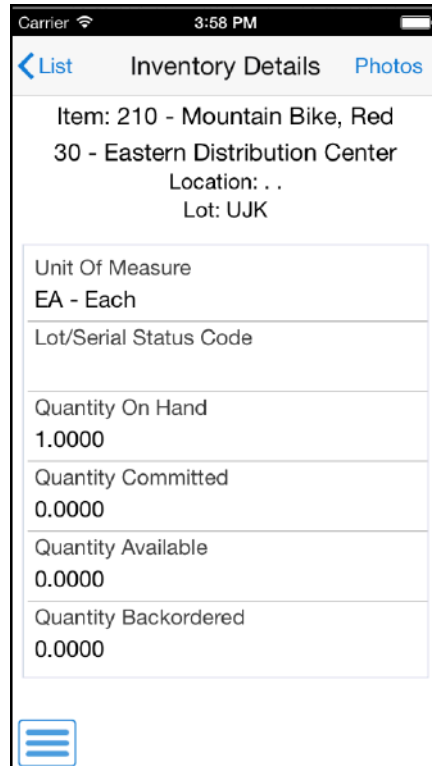
- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.
 To use this option, tap the QR Code button next to the Location and the Lot/Serial number field. The system launches the device camera and you can scan the barcode of the location and the lot/serial number.
- Use a Bluetooth-enabled scanning device to scan the data.
 To use this option, tap the Location and the Lot/Serial number field to activate the scanning device. Then, scan the barcode of the location and lot/serial number using the scanning device.

You can review only the summary quantity information by selecting the Summary Only option. You can omit zero on-hand quantities by selecting the Omit Zero Quantities option.

8. To review inventory availability information, tap a location on the Availability Details screen.

The system displays item availability information including unit of measure, lot/serial status code, on hand quantity, committed quantity, available quantity and backordered quantity.

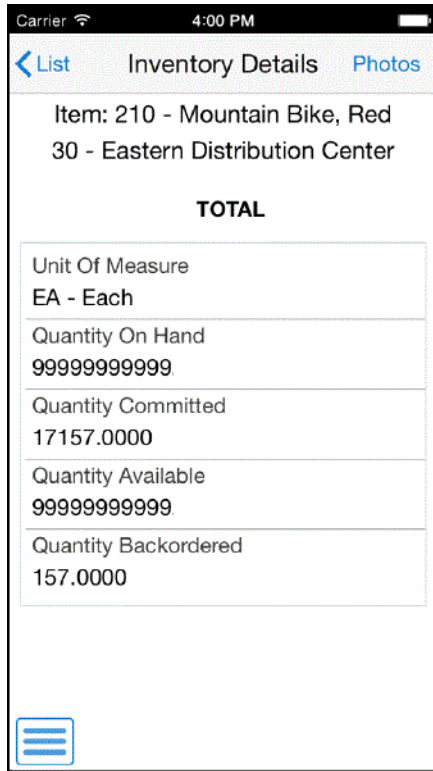
Figure 43–5 Inventory Availability: Inventory Details - Smartphone



9. To view total quantity information, tap the Total row on the Availability Details screen.

The system displays totals of all quantities for the item, including on hand quantities, committed quantities, available quantities and backordered quantities.

Figure 43–6 Inventory Availability: Total Availability - Smartphone



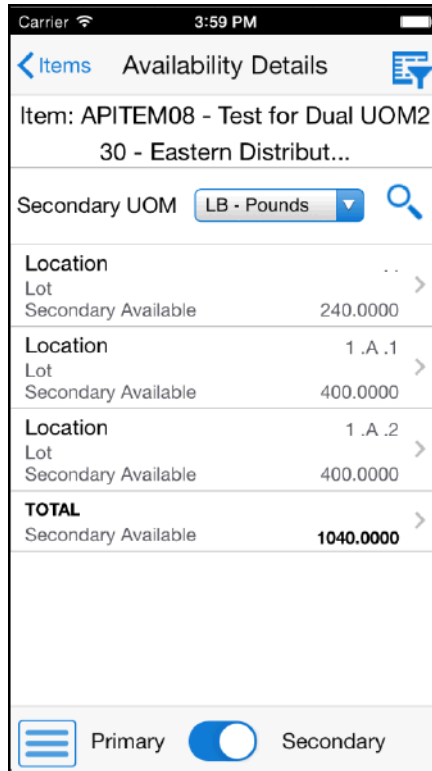
10. To view item photos, tap the Photos button.

To go back to the list of item locations, tap the List button.

11. If you search for inventory availability for a dual item, the system displays a toggle switch at the bottom of the screen.

If you use the toggle switch and select the Secondary option, the system displays availability information using the secondary unit of measure.

Figure 43–7 Inventory Availability: Dual Item Availability - Smartphone



12. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Product Price and Availability Mobile Applications

This chapter discusses these topics:

- [Section 44.1, "Product Price and Availability Mobile Applications Overview"](#)
- [Section 44.2, "Setting Up the Product Price and Availability Mobile Applications"](#)
- [Section 44.3, "Using the Product Price and Availability Mobile Tablet Application \(M41062\)"](#)
- [Section 44.4, "Using the Product Price and Availability Mobile Smartphone Application \(M41063\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Setting Up Customer Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
 - "Using Base Pricing" in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
 - "Working with Schedules and Adjustments" in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
-
-

44.1 Product Price and Availability Mobile Applications Overview

You use the Product Price and Availability mobile applications to search for and review customer-specific price, item price, item detail and availability, and lot detail information.

You can use filters to search for item detail and availability based on item number and stocking type. You can also use filters to search for item price based on customer and branch/plant.

This table lists the applications that are available to review item price and availability information:

Type of Application	Additional Information
Base EnterpriseOne application	To review item and price information, use these applications in the JD Edwards EnterpriseOne system: <ul style="list-style-type: none"> Item Master (P4101) Item Availability (P41202) Lot Master (P4108) Base Price Revisions (P4106) Check Price and Availability (P4074)
Tablet application	Product Price and Availability (M41062) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> JD Edwards Price Availability
Smartphone application	Product Price and Availability (M41063) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> JD Edwards Price Availability

Before using the Product Price and Availability tablet or smartphone application, set the processing options for the Product Price and Availability mobile tablet application (M41062) and the Product Price and Availability smartphone application (M41063). You set the processing options to specify the versions that the mobile application uses to process data related to item price, item detail and availability, and item lot details.

44.1.1 Differences and Limitations: Product Price and Availability

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Barcode Scanning (Release 9.1 Update)

This application is designed to scan data from a barcode and populate the item number in the Item Number field. To scan barcode data, you can use the native camera on your device or a third-party handheld bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc. and does not require or recommend that you use this service to create your barcodes.

To use the camera device to scan barcodes, you must disable the Bluetooth option on your mobile device settings.

To use a third-party scanning device, you must enable the Bluetooth option on your mobile device settings. You must configure the third-party scanning device to connect to your mobile device. The third-party vendor provides instructions to configure the connection to your device.

Language Support

You should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

44.2 Setting Up the Product Price and Availability Mobile Applications

Before using the Product Price and Availability mobile applications (M41062 and M41063), you must verify the processing options setup for each application. The processing options for both the tablet and the smartphone applications specify the versions of the base JD Edwards EnterpriseOne applications that the mobile applications use.

The system administrator must set the processing options for these mobile applications before the applications are made available to end users.

See "Setting Processing Options for Item Master (P4101)" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*

See "Setting Processing Options for Item Branch Plant (P41026)" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*

See "Setting Processing Options for Item Availability (P41202)" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*

See "Setting Processing Options for Lot Master (P4108)" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*

44.2.1 Setting Processing Options for the Product Price and Availability Mobile Tablet Application (M41062)

You use processing options to specify default processing information for a program.

44.2.1.1 Versions

1. Item Master (P4101) Version

Use this processing option to specify which version of the Item Master program (P4101) the system uses to process item master information. The Product Price and Availability tablet application processes item master information based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

2. Item Branch (P41026) Version

Use this processing option to specify which version of the Item Branch program (P41026) the system uses to process item branch information. The Product Price and Availability tablet application processes item branch information based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

3. Item Availability (P41202) Version

Use this processing option to specify which version of the Item Availability program (P41202) the system uses to process item detail and availability information. The Product Price and Availability tablet application processes item detail and availability information based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

4. Lot Master (P4108) Version

Use this processing option to specify which version of the Lot Master program (P4108) the system uses to process lot detail information. The Product Price and Availability tablet application processes lot detail information based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

5. Price History (P4074) Version

Use this processing option to specify which version of the Price History program (P4074) the system uses to review price adjustment information. If you leave this option blank, the system uses version ZJDE0001.

44.2.2 Setting Processing Options for the Product Price and Availability Mobile Smartphone Application (M41063)

You use processing options to specify default processing information for a program.

44.2.2.1 Versions

1. Item Master (P4101) Version

Use this processing option to specify which version of the Item Master program (P4101) the system uses to process item master information. The Product Price and Availability smartphone application processes item master information based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

2. Item Branch (P41026) Version

Use this processing option to specify which version of the Item Branch program (P41026) the system uses to process item branch information. The Product Price and Availability smartphone application processes item branch information based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

3. Item Availability (P41202) Version

Use this processing option to specify which version of the Item Availability program (P41202) the system uses to process item detail and availability information. The Product Price and Availability smartphone application processes item detail and availability information based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

4. Lot Master (P4108) Version

Use this processing option to specify which version of the Lot Master program (P4108) the system uses to process lot detail information. The Product Price and Availability smartphone application processes lot detail information based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

5. Price History (P4074) Version

Use this processing option to specify which version of the Price History program (P4074) the system uses to review price adjustment information. If you leave this option blank, the system uses version ZJDE0001.

44.3 Using the Product Price and Availability Mobile Tablet Application (M41062)

The Product Price and Availability tablet application enables you to search for and review price information, item detail and availability information, and lot detail information.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Price and Avail icon and log in.

44.3.1 Reviewing Product Price and Item Detail Availability Information Using a Mobile Tablet

To review product price and item detail availability information on your tablet:

1. Open the application by tapping the Price and Avail icon on your device, and then log in.

See [Section 3.2, "Logging Into Mobile Enterprise Applications"](#)

2. To refine the list of items that appear on your screen, tap the Filter button to access the Filters pane. You can use these fields to filter item price and availability:

- Item Number (Release 9.1 Update)

To enter data in the Item Number field you have three options. You can:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must:
 - a. Disable the Bluetooth option in your device settings.
 - b. Access the device camera by tapping the QR Code button next to the Item Number field.
 - c. Use the camera to scan the barcode of the item.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 - a. Enable the Bluetooth option in your device settings.
 - b. Configure the third-party scanning device to connect to your mobile device.
 - c. Tap the Item Number field to activate the scanning device.
 - d. Scan the barcode of the item.

- Stocking Type

3. In the Filters pane to continue the search using the specified filters, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of branch plants that stock the item based on your filter values. The default view is the information on the Availability tab.

You can tap the Filter button in the right pane to refine your search to a specific branch plant.

- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

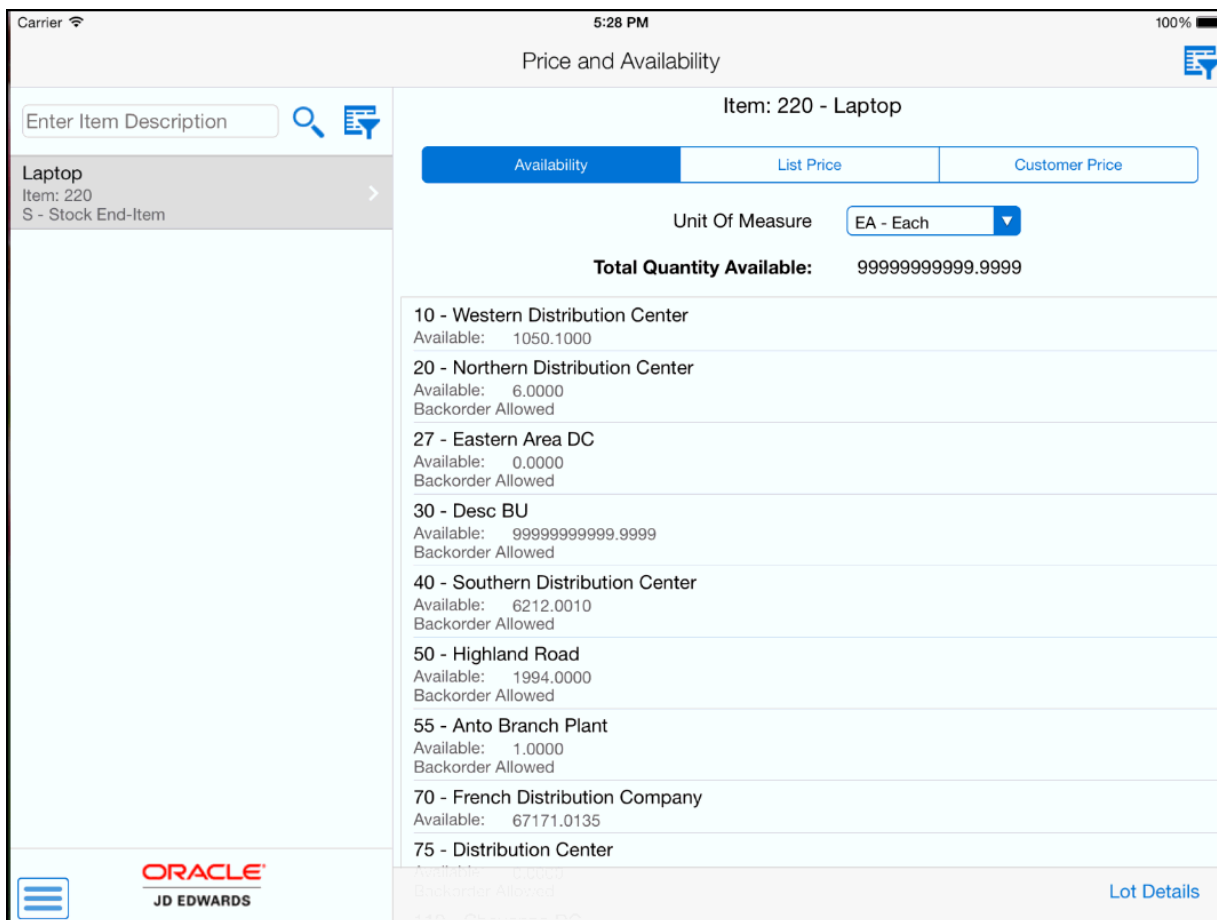
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of branch plants that stock the item with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

4. On the Availability tab, review the item availability information, which includes:
 - Branch plant.
 - Quantity available.
 - Whether you can back order the item.

Figure 44–1 Price and Availability - Availability Screen: Tablet



5. To review the lot details information, tap Lot Details at the lower right of the right pane.

The system displays the Lot Availability Details screen. The left pane displays a list of the available quantity for the item in each branch plant. The right pane displays the item information for the first record listed in the left pane.

Figure 44–2 Lot Availability Details Screen: Tablet

Carrier		5:29 PM		100%	
Items		Lot Availability Details			
		Item: 220 - Laptop			
		10 - Western Distribution Center			
		EA - Each			
10 - Western Distribution Center					
Available: 1050.1000 EA					
20 - Northern Distribution Center		1234 - Laptop			
Available: 6.0000 EA		Available: .0000			
27 - Eastern Area DC		Lot Expiration Date: 02/18/14			
Available: 0.0000 EA		Country of Origin:			
30 - Desc BU		Sell By Date: 02/18/14			
Available: 9999999999.9999 EA		12345 - Laptop			
40 - Southern Distribution Center		Available: .0000			
Available: 6212.0010 EA		Lot Expiration Date: 03/29/14			
50 - Highland Road		Country of Origin:			
Available: 1994.0000 EA		Sell By Date: 02/18/14			
55 - Anto Branch Plant		ABCC1391 - Touring Bike, Red			
Available: 1.0000 EA		Available: 8.0000-			
70 - French Distribution Company		Lot Expiration Date: 12/16/17			
Available: 67171.0135 EA		Country of Origin:			
75 - Distribution Center		Sell By Date: 12/20/12			
Available: 0.0000 EA					
110 - Cheyenne DC					
Available: .9000- EA					
115 - Cheyenne Service Depot					
Available: .1000 EA					
310 - Denver Mfg. Facility					
Available: 1.0000- EA					
A20 - SP					
Available: 0.0000 EA					
D30 - EPS Distribution Center					
ORACLE					
JD EDWARDS					

6. To filter items by branch plant, tap the filter button at the top of the left pane. Enter the branch plant and tap the Apply button.
7. To refine the lot availability information that appears on your screen, tap the Filter button at the top of the right pane.

You can use these fields to filter the lot availability information:

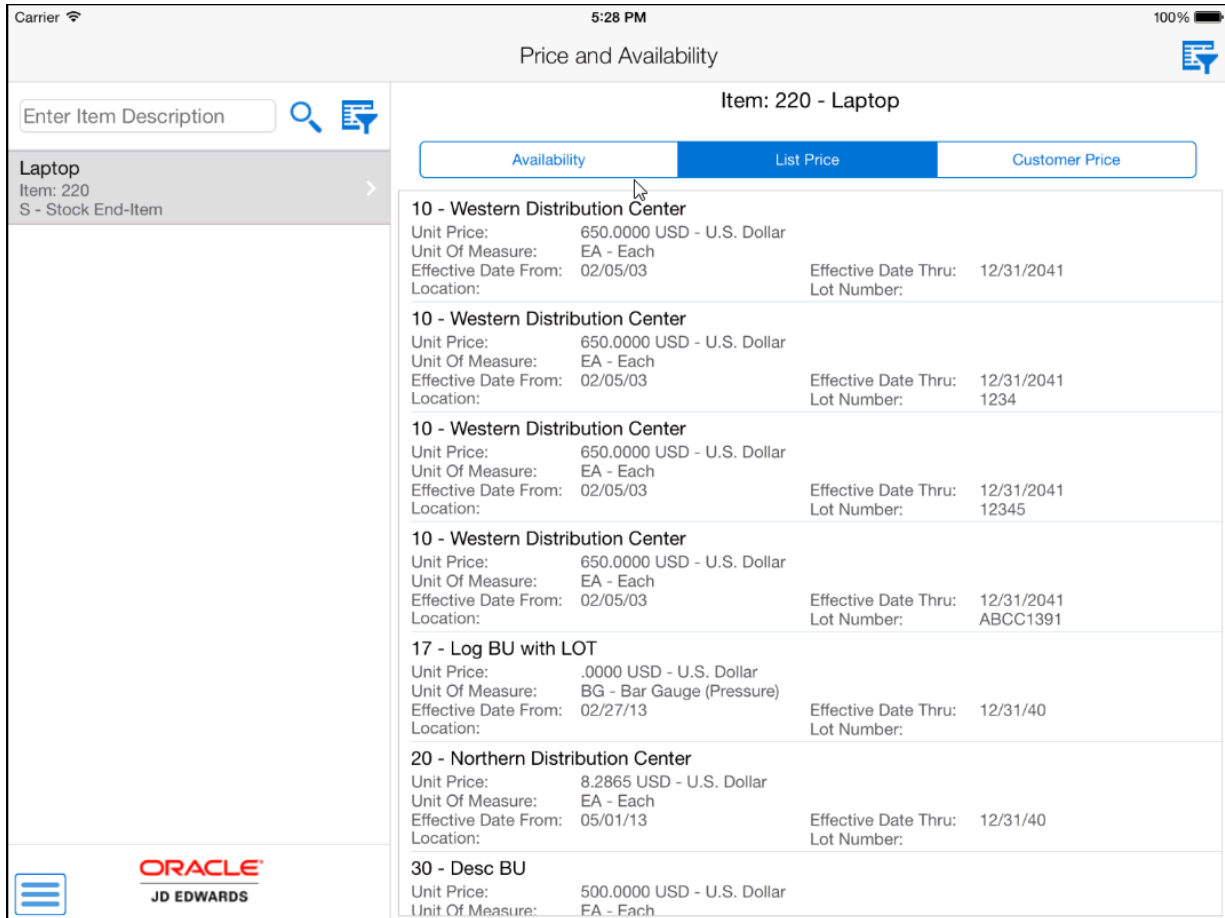
- Country of Origin
 - Lot/Serial Status Code
 - Lot Expiration Date
8. Tap the Items button to return to the Price and Availability screen.
 9. To review price information, tap the List Price tab.

The system displays the item in each respective branch, along with the following information:

- Unit of measure
- Unit price
- Effective date from
- Effective date thru
- Location

- Lot number

Figure 44–3 Price and Availability - List Price Screen: Tablet



10. To refine the price information that appears on your screen, tap the Filter button at the top of the right pane.

You can use these fields to filter the price information:

- Branch Plant
- Currency Code
- Price Effective Date

11. To review customer price information, tap the Customer Price tab.

Figure 44–4 Price and Availability - Customer Price Screen: Tablet

Carrier 5:31 PM 100%

Price and Availability

Item: 220 - Laptop

Enter Item Description

Laptop
Item: 220
S - Stock End-Item

Availability List Price Customer Price

Customer 4242 Branch Plant 30 Get Price

Customer Price: 460.0000 USD Adjustment Schedule: SCHEDULE
Unit Price: 500.0000 USD Price Effective Date: 11/21/14

Adjustment Name	Factor Value Numeric	Discount Price
LINE - Line Level Adjust	8.0000- % of Base Price	40.0000-
ADJUST - Adjustment 1	2.5000 % of Current Net Price	11.5000
ACCURAL - Accrual Adjustment	5.0000- Add on Amount	5.0000-
REBATE1 - Rebate Adjustment	10.0000- % of Base Price	50.0000-

ORACLE
JD EDWARDS

12. You can use these fields to filter the customer price information:

- Customer
- Branch Plant

13. Tap the Get Price button.

The system displays the unit price, the customer price, effective price date and any applicable adjustment schedules and discounts.

Additionally, you can attach a price adjustment schedule to further define your search. To do so, tap the filter button next to the Get Price button, and use these fields to define your criteria:

- Adjustment Schedule
- Quantity From
- Pricing UOM
- Price Effective Date

14. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

44.4 Using the Product Price and Availability Mobile Smartphone Application (M41063)

The Product Price and Availability smartphone application enables you to search for and review price information, item detail and availability information, and lot detail information.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Price and Avail icon and log in.

44.4.1 Reviewing Product Price and Item Detail Availability Information Using a Mobile Smartphone

To review product price and item detail availability information on your smartphone:

1. Open the application by tapping the Price and Avail icon on your device, and then log in.

See [Section 3.2, "Logging Into Mobile Enterprise Applications"](#)

2. To refine the list of items that appear on your screen, tap the Filter button to access the Filters screen. You can use these fields to filter item product price and item detail availability:

- Item Number (Release 9.1 Update)

To enter data in the Item Number field you have three options. You can:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must:
 - a. Disable the Bluetooth option in your device settings.
 - b. Access the device camera by tapping the QR Code button next to the Item Number field.
 - c. Use the camera to scan the barcode of the item.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 - a. Enable the Bluetooth option in your device settings.
 - b. Configure the third-party scanning device to connect to your mobile device.
 - c. Tap the Item Number field to activate the scanning device.
 - d. Scan the barcode of the item.

- Stocking Type

3. On the Filters screen to continue the search using the specified filters, tap the Apply button. When you tap the Apply button, the system:

- Displays the item that you specified in the Filter screen. Tap the Next Field button to display a list of branch plants that stock the item based on your filter values. The default view is the information on the Availability tab.

You can tap the Filter button to refine your search to a specific branch plant.

- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

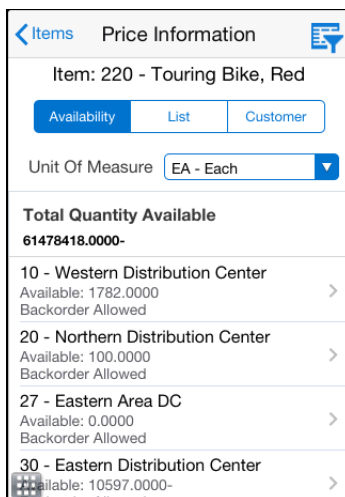
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of branch plants that stock the item with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

4. On the Availability tab, review the item availability information, which includes:
 - Branch plant.
 - Quantity available.
 - Whether you can back order the item.

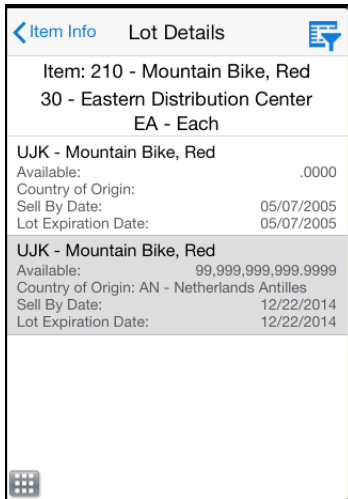
Figure 44–5 Price Information - Availability Screen: Smartphone



5. To filter items by branch plant, tap the Filter button. On the Filters screen, enter the branch plant and tap the Apply button.
6. To review lot availability details information, tap the item from a list of the items that appear on the Availability tab.

The system displays the Lot Details screen.

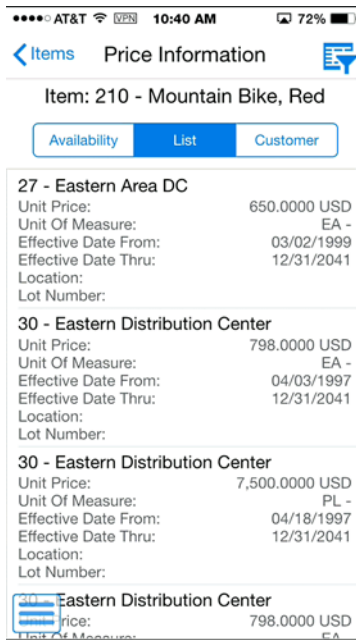
Figure 44–6 Lot Details Screen: Smartphone



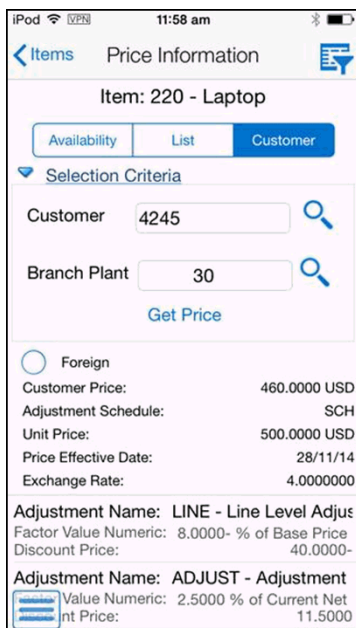
7. To refine the lot availability information that appears on your screen, tap the Filter button. You can use these fields to filter the lot availability information:
 - Country of Origin
 - Lot/Serial Status Code
 - Lot Expiration Date
8. Tap the Item Info button to return to the Price Information screen.
9. To review price information, tap the List tab.

The system displays the item in each respective branch, along with the following information:

- Unit of measure
- Unit price
- Effective date from
- Effective date thru
- Location
- Lot number

Figure 44–7 Price Information - List Screen: Smartphone

10. To refine the price information that appears on your screen, tap the Filter button. You can use these fields to filter the price information:
 - Branch Plant
 - Currency Code
 - Price Effective Date
11. To review customer price information, tap the Customer tab.

Figure 44–8 Price Information - Customer Screen: Smartphone

12. To view and use additional filter fields for customer price information, tap the Selection Criteria option at the top of the screen. You can then complete these options:

- Customer (Required)
- Branch Plant (Required)

Tap the Get Price button.

The system displays the unit price, the customer price, effective price date and any applicable adjustment schedules and discounts. Also note that the Foreign button appears only if the version the P03013 that is used by the mobile application is set up to display this option.

Additionally, you can attach a price adjustment schedule to further define your search. To do so, tap the filter button at the top right of the screen, and use these fields to define your criteria:

- Adjustment Schedule
- Quantity From
- Pricing UOM
- Price Effective Date

13. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Quote Review and Release Mobile Applications

This chapter discusses these topics:

- [Section 45.1, "Quote Review and Release Mobile Applications Overview"](#)
- [Section 45.2, "Setting Up the Quote Review and Release Mobile Applications"](#)
- [Section 45.3, "Using the Quote Review and Release Mobile Tablet Application \(M42070\)"](#)
- [Section 45.4, "Using the Quote Review and Release Mobile Smartphone Application \(M42073\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Holding, Releasing and Reviewing Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
 - "Entering Additional Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
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45.1 Quote Review and Release Mobile Applications Overview

You use the Quote Review and Release mobile applications to search for and review sales order quote information. You can also release quantity and generate a sales order from the sales order quote.

You can use filters to search for quote information based on order type, branch plant, item number, sold to customer, and request date.

This table lists the applications that are available to review sales order information:

Type of Application	Additional Information
Base EnterpriseOne application	To review sales order quote information, use the Release Quotes (P420111) application in the JD Edwards EnterpriseOne system.

Type of Application	Additional Information
Tablet application	Quote Review and Release (M42070) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Release Quotes
Smartphone application	Quote Review and Release (M42073). To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Release Quotes

Before using the Quote Review and Release tablet or smartphone application, set the processing options for the Quote Review and Release tablet application (M42070) and the Quote Review and Release smartphone application (M42073). You set the processing options to specify the version that the mobile application uses to process data related to sales order quotes.

45.1.1 Differences and Limitations: Quote Review and Release

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

45.2 Setting Up the Quote Review and Release Mobile Applications

Before using the Quote Review and Release mobile applications (M42070 and M42073), you must verify the processing options setup for each application. The processing options for both the tablet and the smartphone applications specify the versions of the base JD Edwards EnterpriseOne applications that the mobile applications use.

The system administrator must set the processing options for these mobile applications before the applications are made available to end users.

See "Setting Processing Options for the Sales Blanket Order Release Program (P420111)" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

45.2.1 Setting Processing Options for the Quote Review and Release Mobile Tablet Application (M42070)

You use processing options to specify default processing information for a program.

45.2.1.1 Process

1. Allow Alternate Language Search

Use this processing option to specify whether the program allows alternate language search. Values are:

Blank: Do not allow alternate language search.

1: Allow alternate language search.

When you activate this option, the system applies the functionality to the Item Number field located on the Filter pane.

45.2.1.2 Versions

1. Sales Quote (P420111) Version

Use this processing option to specify the version for the Sales Quote (P420111) program. If you leave this processing option blank, the system uses version ZJDE0002.

45.2.2 Setting Processing Options for the Quote Review and Release Mobile Smartphone Application (M42073)

You use processing options to specify default processing information for a program.

45.2.2.1 Process

1. Allow Alternate Language Search

Use this processing option to specify whether the program allows alternate language search. Values are:

Blank: Do not allow alternate language search.

1: Allow alternate language search.

When you activate this option, the system applies the functionality to the Item Number field located on the Filter pane.

45.2.2.2 Versions

1. Sales Quote (P420111) Version

Use this processing option to specify the version for the Sales Quote (P420111) program. If you leave this processing option blank, the system uses version ZJDE0002.

45.3 Using the Quote Review and Release Mobile Tablet Application (M42070)

The Quote Review and Release tablet application enables you to review and release sales order quotes. You can also generate sales orders from a sales order quote.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Rel Quotes icon and log in.

45.3.1 Reviewing and Releasing Sales Order Quotes Using a Mobile Tablet

To review and release sales order quotes on your tablet:

1. Open the application by tapping the Rel Quotes icon on your device, and then log in.

See [Section 3.2, "Logging Into Mobile Enterprise Applications"](#)

The system displays the Quote Review and Release screen. In the left pane, the system displays a list of quote orders waiting for release. In the right pane, the

system displays the Order tab and the Detail tab. The default view is the information in the Order tab.

2. To refine the list of quote orders that appear on your screen, tap the Filter button to access the Filters pane.

You can use these fields to filter the quote orders:

- Order Type

By default, the system populates this filter field with the order type specified in the Order Type processing option of the version of the Order Release program (P420111) that you use for the mobile application.

- Branch Plant
- Item Number
- Sold To
- Request Date

3. In the Filters pane to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of quote orders that are displayed based on your filter values.
- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of quote orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

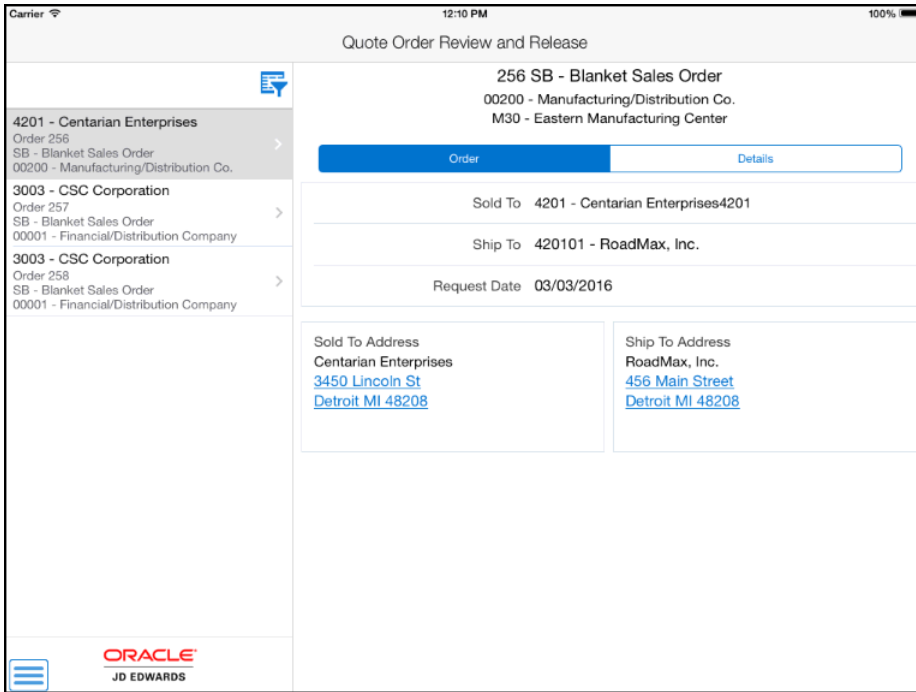
To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

4. To review a quote order header, tap the quote order from the list of quote orders. In the Order tab, the system displays the following information:

- Sold To
- Ship To
- Request Date
- Order Total
- Sold To Address
- Ship To Address

Tap the link in the Sold To Address or Ship To Address sections of the screen to use the map or navigational features of your device.

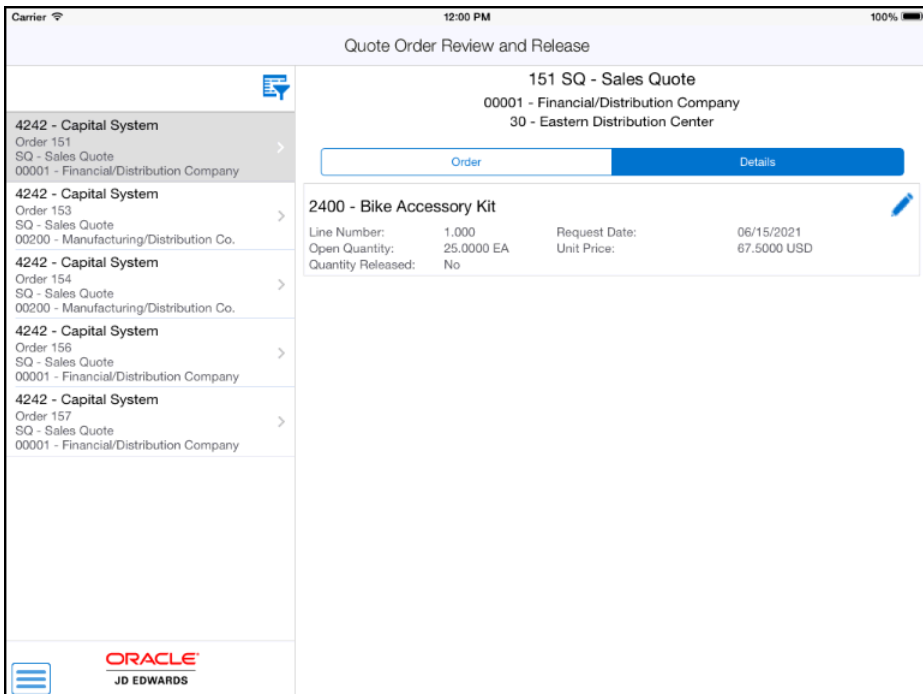
Figure 45–1 Quote Order Review and Release - Order Header Screen: Tablet



5. To review sales order quote detail, tap the Detail tab.

The system displays detail information for each line number on the sales order quote. The detail information includes open quantity, unit of measure, whether the quantity has been released, and request date.

Figure 45–2 Quote Order Review and Release - Order Detail Screen: Tablet



6. To release order quantity, tap the Edit button.

The system opens the Release Quantity window. You can edit the following fields:

- Production Number
- New Order Number
- Order Type
- Release Quantity

The system uses the open quantity to be released as the default value. If you enter a quantity greater than the quantity on the release order, the system displays an error.

- Request Date

After you enter the release quantity, tap the Save button. The system returns to the Order Detail tab and the open quantity is reduced by the same amount as the release quantity.

7. Tap the Generate Order button to generate a sales order for the released quantity.

The system displays the Confirm Order Generate window. Tap Generate to confirm the order generation, or Cancel to exit.

The system generates a sales order and displays an alert window to let you know the order number and order type. Tap anywhere on the screen to dismiss the message.

8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

45.4 Using the Quote Review and Release Mobile Smartphone Application (M42073)

The Quote Review and Release smartphone application enables you to review and release sales order quotes. You can also generate sales orders from a sales order quote.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Rel Quotes icon and log in.

45.4.1 Reviewing and Releasing Sales Order Quotes Using a Mobile Smartphone

To review and release sales order quotes on your smartphone:

1. Open the application by tapping the Rel Quotes icon on your device, and then log in.

See [Section 3.2, "Logging Into Mobile Enterprise Applications"](#)

The system displays the Quote Order Release screen with a list of quote orders waiting for release.

2. To refine the list of quote orders that appear on your screen, tap the Filter button to access the Filters pane.

You can use these fields to filter the quote orders:

- Order Type

By default, the system populates this filter field with the order type specified in the Order Type processing option of the version of the Order Release program (P420111) that you use for the mobile application.

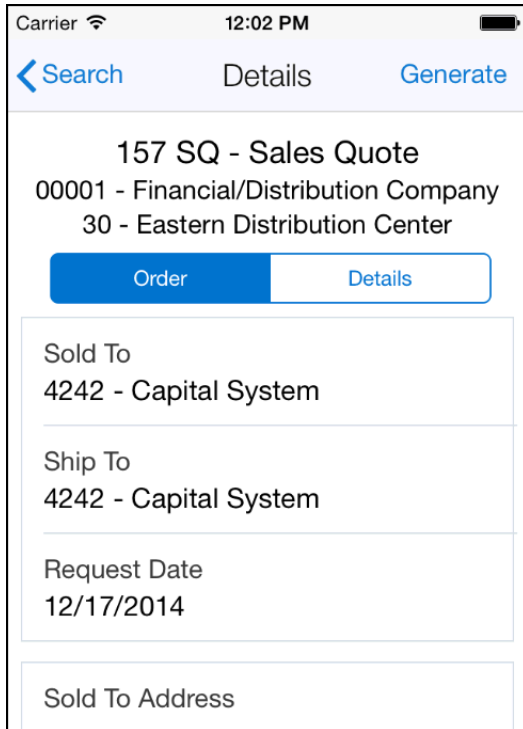
- Branch Plant
 - Item Number
 - Sold To
 - Request Date
3. In the Filters pane to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
- Takes you to the list of quote orders that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.
- To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:
- Takes you to the list of quote orders associated with the last saved filter values, if applicable.
 - Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

4. To review a quote order header, tap the quote order from the list of quote orders. In the Order tab, the system displays the following information:
- Sold To
 - Ship To
 - Requested Date
 - Sold To Address
 - Ship To Address

Tap the link in the Sold To Address or Ship To Address sections of the screen to use the map or navigational features of your device.

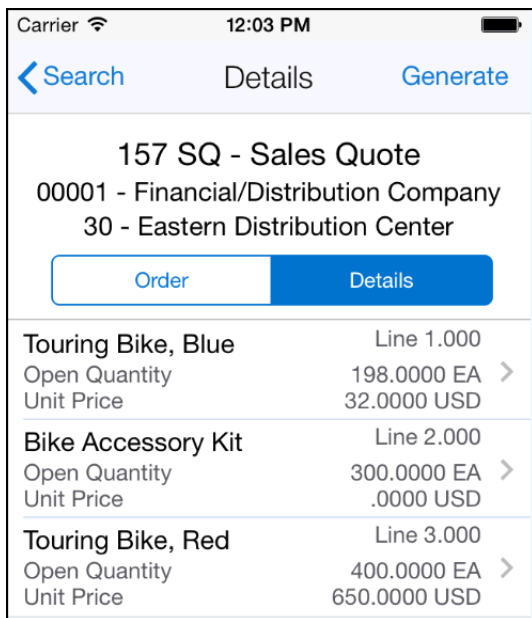
Figure 45-3 Quote Order - Order Tab: Smartphone



- To review sales order quote detail, tap the Detail tab.

The system displays detail information for each line number on the sales order quote. The detail information includes quantity, unit and extended price, quantity released, and requested date.

Figure 45-4 Quote Order - Order Detail Screen: Smartphone



- To release order quantity, tap the order detail line.

The system displays the line screen. Tap the Release button.

On the Release screen, you can edit the following fields:

- Production Number
- New Order Number
- Order Type
- Release Quantity

The system uses the open quantity to be released as the default value. If you enter a quantity greater than the quantity on the release order, the system displays an error.

- Request Date

After you enter the release quantity, tap the Save button. The system returns to the Details screen and displays the Generate button. The open quantity is reduced by the same amount as the release quantity.

7. Tap the Generate button to generate a sales order for the released quantity.

The system displays the Confirm Order Generate window. Tap Generate to confirm the order generation.

The system generates a sales order and displays an alert window to let you know the order number and order type. Tap the OK button.

8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Sales Held Order Release Mobile Applications

This chapter discusses these topics:

- [Section 46.1, "Sales Held Order Release Mobile Applications Overview"](#)
- [Section 46.2, "Setting Up the Sales Held Order Release Mobile Applications"](#)
- [Section 46.3, "Using the Sales Held Order Release Mobile Tablet Application"](#)
- [Section 46.4, "Using the Sales Held Order Release Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- *Entering Order Holds in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
-
-

46.1 Sales Held Order Release Mobile Applications Overview

You use the Sales Held Order Release mobile applications to review and release the sales orders being held in the JD Edwards EnterpriseOne system. To have the system process an order that is on hold, you must release the hold by using the correct password.

The intended user of these applications is an authorized personnel, such as a credit manager, responsible for reviewing and releasing the sales order holds.

You can review all types of holds on a specific sales order and select the holds that you want to release.

The Sales Held Order Release applications for tablet and smartphone enable you to:

- Review the percentage of sales held orders by hold code on a pie chart.
- Review order-level details for sales held orders.
- Review line-level details for sales held orders.
- Release sales held orders.

This table lists the applications that are available to process sales held orders:

Type of Application	Additional Information
Base EnterpriseOne application	Use these applications in the JD Edwards EnterpriseOne system to process sales held orders: <ul style="list-style-type: none"> ■ Held Order Release (P43070) ■ Sales Order Entry (P4210) ■ Credit Check (P42050) ■ User Defined Code (P0004A)
Tablet application	Sales Held Order Release (M43071) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Sales Held Order Release
Smartphone application	Sales Held Order Release (M43072) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Sales Held Order Release

Before using the Sales Held Order Release tablet or smartphone application, you should first set the processing options for each application.

46.1.1 Differences and Limitations: Sales Held Order Release

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

46.2 Setting Up the Sales Held Order Release Mobile Applications

Before using the Sales Held Order Release mobile applications, you should set the processing options for each program. You use the processing options to define the default sales held order type that you want the device to display when you open the application.

You also define the versions of the Held Order Release program that you want the mobile applications to use when retrieving information. Before entering a version in the processing options of the mobile applications, you should review the processing options of the Held Order Release program to verify that they are set with the correct default information. See [Setting Processing Options for Held Order Release \(P43070\)](#).

End users of the Sales Held Order Release mobile applications also have the ability to set up user preferences within the mobile applications. These preferences enable users to display either all sales held orders or only the orders assigned to them.

46.2.1 Setting Processing Options for the Sales Held Order Release Mobile Tablet Application (M43071)

You use processing options to specify default processing information for a program.

46.2.1.1 Versions

1. Held Order Release - Sales (P43070) Version

Use this processing option to specify which version of the Held Order Release - Sales program the mobile application uses to determine default values during the review and release of a sales held order. If you leave this option blank, the device uses version ZJDE0002.

2. Sales Order Entry (P4210) Version

Use this processing option to specify which version of the Sales Order Entry program that the mobile application uses to determine default values during the review and release of a sales held order. If you leave this option blank, the device uses version ZJDE0001.

3. Credit Check (P42050) Version

Use this processing option to specify which version of the Credit Check program that the mobile application uses to determine default values during the review and release of a sales held order. If you leave this option blank, the device uses version ZJDE0001.

4. User Defined Codes (P0004A) Version

Use this processing option to specify which version of the User Defined Codes program that the mobile application uses to determine default values during the review and release of a sales held order. If you leave this option blank, the device uses version ZJDE0001.

46.2.1.2 Display

1. Held Order display options

Use this processing option to specify the default held order that the system will display when you open the application. Valid values are:

Blank: Display line-level held orders.

1: Display order-level held orders.

46.2.2 Setting Processing Options for the Sales Held Order Release Mobile Smartphone Application (M43072)

You use processing options to specify default processing information for a program.

46.2.2.1 Versions

1. Held Order Release - Sales (P43070) Version

Use this processing option to specify which version of the Held Order Release - Sales program the mobile application uses to determine default values during the review and release of a sales held order. If you leave this option blank, the device uses version ZJDE0002.

2. Sales Order Entry (P4210) Version

Use this processing option to specify which version of the Sales Order Entry program that the mobile application uses to determine default values during the review and release of a sales held order. If you leave this option blank, the device uses version ZJDE0001.

3. Credit Check (P42050) Version

Use this processing option to specify which version of the Credit Check program that the mobile application uses to determine default values during the review and release of a sales held order. If you leave this option blank, the device uses version ZJDE0001.

4. User Defined Codes (P0004A) Version

Use this processing option to specify which version of the User Defined Codes program that the mobile application uses to determine default values during the review and release of a sales held order. If you leave this option blank, the device uses version ZJDE0001.

46.2.2.2 Display

1. Held Order display options

Use this processing option to specify the type of default held order that the system will display when you open the application. Valid values are:

Blank: Display line-level held orders.

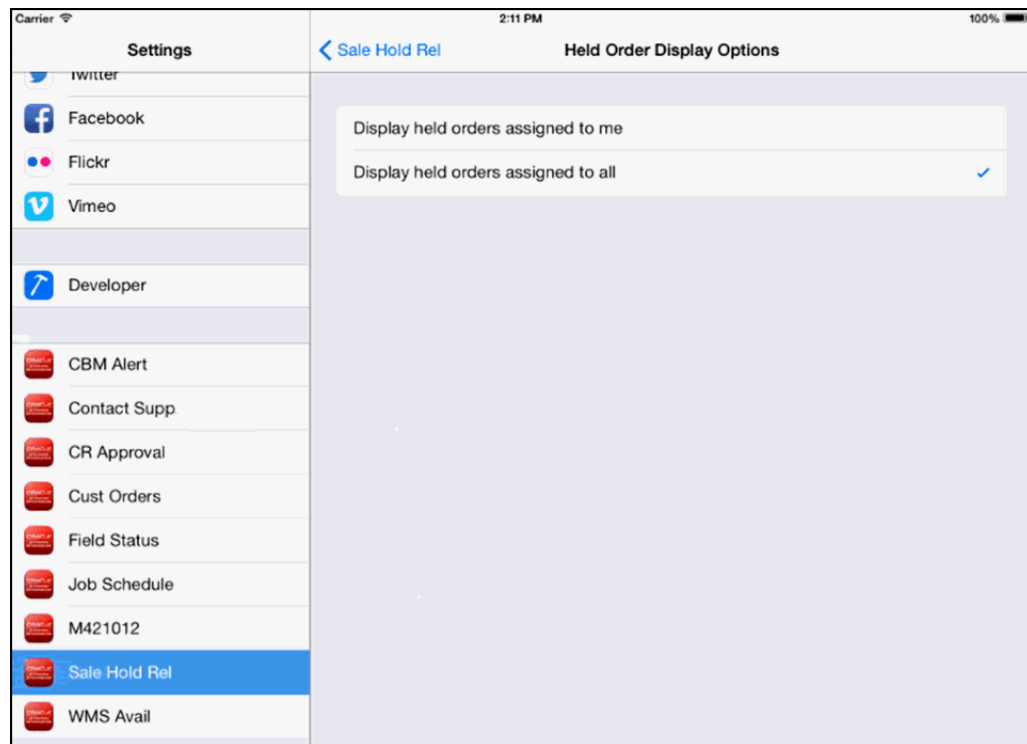
1: Display order-level held orders.

46.2.3 Setting User Preference for the Sales Held Order Release Mobile Applications

You can specify your preference for the display of orders in the Sales Held Order Release mobile applications on your device.

To set the display preference, access Settings on your device, select the Sales Hold Rel application to configure, and select the option for order display.

Figure 46–1 System Preferences for Sales Held Order Display - Tablet



- Display held orders assigned to me: Tap this option if you want the device to display the list of all sales held orders that the person logged into the application

is responsible for releasing, on the Sales Held Order Review and Release tablet home screen or the Release Held SO smartphone screen.

- Display held orders assigned to all: Tap this option if you want the device to display all sales held orders in the home screen.

Note: You can override the specified preference by entering a specific address book number in the Person Responsible field or making the field blank, and then tapping the Search button on the home screen. This option is just for convenient quick viewing on your device based on your preference.

46.3 Using the Sales Held Order Release Mobile Tablet Application

The Sales Held Order Release tablet application enables you to review header, detail, and credit information at order level, and header and details at line level for an order. It also enables you to release hold on an order.

Before you can use the application, you must download and install the application from the application store on your device.

46.3.1 Reviewing and Releasing Held Orders Using a Mobile Tablet

To review the sales held orders:

1. Open the application by tapping the Sales Hold Rel icon on your device, and then log in.

See [Section 3, "Logging Into Mobile Enterprise Applications"](#)

2. The device displays the list of all sales orders that are on hold, or the list of all sales held orders that the person logged into the application is responsible for releasing, on the Sales Held Order Review and Release home screen, based on the user preference of the mobile application.

If you want to retrieve the list of orders for a specific address book number, enter the address book number in the Person Responsible field, and then tap the Search button. The device displays all orders assigned to the specific address book number.

3. To narrow your search using filter fields, tap the Filter button at the top of the left pane. On the Filters screen, specify values in these fields to filter your records:
 - Person Responsible
 - Branch Plant
 - Customer
 - Order Number
 - Order Type
 - Hold Code
 - Order Date
 - Request Date
 - Promised Delivery Date
4. To continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of sales held orders that are displayed based on your filter values.
- Saves the filter values that you entered.

The next time you open the filter screen, the system displays the saved filter values.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

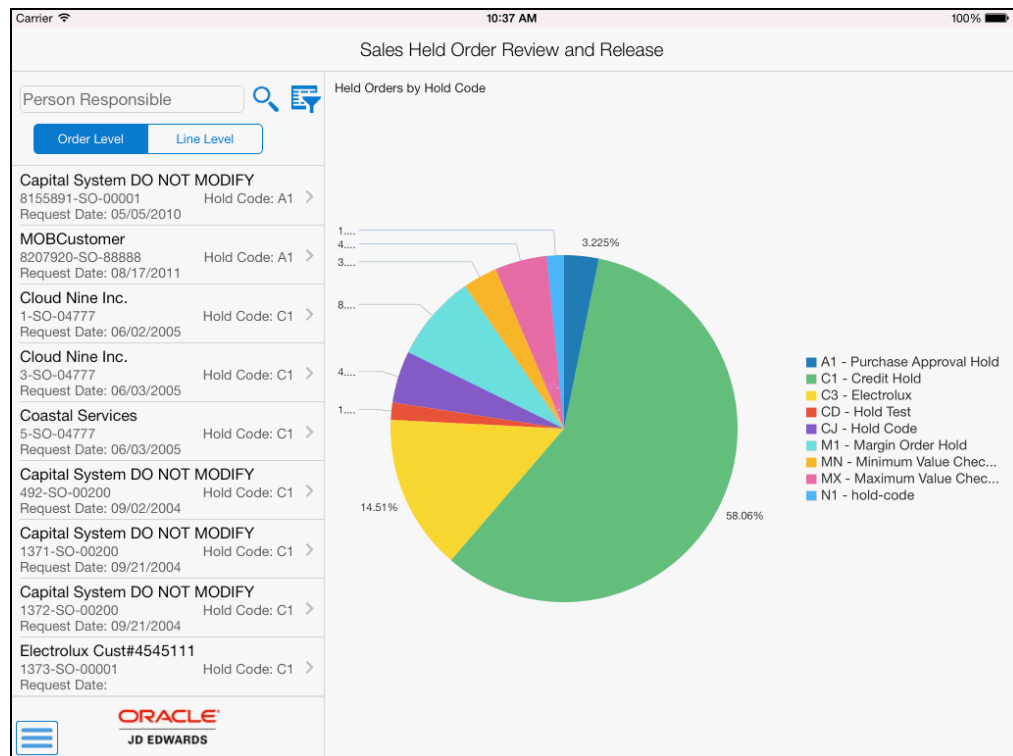
- Takes you to the list of sales held orders associated with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system returns you to the Held Order Review and Release screen with a list of sales held orders that meet your search criteria. The device displays the pie chart for sales held orders by hold code in the right pane. The system displays the order-level or line-level details based on the processing option setting of the application.

Tap any record in the list to review the details for that record.

Figure 46–2 Sales Held Order Release - Home Screen - Tablet



6. For order-level hold, the system displays order details on Header, Details, and Credit Info tabs. You can use these tabs to only review details. Tap the appropriate tab to review details for the selected order:

- Tap the Header tab to review the branch plant, customer address book number and address, order date, request date, ship to, and customer PO details for the held orders.

Figure 46–3 Sales Held Order Release Order Level - Header Tab - Tablet

Carrier 10:40 AM 100%

< Charts Sales Held Order Review and Release Release

Person Responsible

Order Level Line Level

Capital System DO NOT MODIFY
8155891-SO-00001 Hold Code: A1 >
Request Date: 05/05/2010

MOBCustomer
8207920-SO-88888 Hold Code: A1 >
Request Date: 08/17/2011

Cloud Nine Inc.
1-SO-04777 Hold Code: C1 >
Request Date: 06/02/2005

Cloud Nine Inc.
3-SO-04777 Hold Code: C1 >
Request Date: 06/03/2005

Coastal Services
5-SO-04777 Hold Code: C1 >
Request Date: 06/03/2005

Capital System DO NOT MODIFY
492-SO-00200 Hold Code: C1 >
Request Date: 09/02/2004

Capital System DO NOT MODIFY
1371-SO-00200 Hold Code: C1 >
Request Date: 09/21/2004

Capital System DO NOT MODIFY
1372-SO-00200 Hold Code: C1 >
Request Date: 09/21/2004

Electrolux Cust#4545111
1373-SO-00001 Hold Code: C1 >
Request Date:

A1 Purchase Approval Hold
8155891 - SO - 00001

Order Details Credit Info

Branch Plant 30 - Eastern Distribution Center

Sold To 4242 - Capital System DO NOT MODIFY

Order Date 05/05/2010

Request Date 05/05/2010

Ship To 4242 - Capital System DO NOT MODIFY

Customer PO

Ship To Address
Capital System
400 Broadland Road NW
Suite 200
Unit 5
Atlanta
GA
US

Sold To Address
Capital System
400 Broadland Road NW
Suite 200
Unit 5
Atlanta
GA
US

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- Tap the Details tab to review the sales order detail information associated with the selected order.

Figure 46-4 Sales Held Order Release Order Level - Details Tab - Tablet

The screenshot displays the 'Sales Held Order Review and Release' interface. At the top, it shows the carrier, time (10:40 AM), and battery level (100%). The main header is 'Sales Held Order Review and Release' with a 'Release' button. Below this, there's a search bar for 'Person Responsible' and tabs for 'Order Level' and 'Line Level'. The central area is titled 'A1 Purchase Approval Hold 8155891 - SO - 00001' and has tabs for 'Order', 'Details', and 'Credit Info'. The 'Details' tab is active, showing a list of items with their respective details.

Item:	SSSOC.BLK.S1 - Sports ...	Quantity:	1.0000 EA
Unit Price:	100.0000 USD	Requested Date:	05/05/2010
Last Status:	520 - Enter Order/Receive E...	Promised Delivery Date:	05/05/2010
Next Status:	540 - Print Pick	Scheduled Pick Date:	05/05/2010

Item:	SSSOC.BLK.S2 - Sports ...	Quantity:	1.0000 EA
Unit Price:	100.0000 USD	Requested Date:	05/05/2010
Last Status:	520 - Enter Order/Receive E...	Promised Delivery Date:	05/05/2010
Next Status:	540 - Print Pick	Scheduled Pick Date:	05/05/2010

Item:	SSSOC.BLK.S3 - Sports ...	Quantity:	1.0000 EA
Unit Price:	100.0000 USD	Requested Date:	05/05/2010
Last Status:	520 - Enter Order/Receive E...	Promised Delivery Date:	05/05/2010
Next Status:	540 - Print Pick	Scheduled Pick Date:	05/05/2010

Item:	SSSOC.BLK.S4 - Sports ...	Quantity:	1.0000 EA
Unit Price:	100.0000 USD	Requested Date:	05/05/2010
Last Status:	520 - Enter Order/Receive E...	Promised Delivery Date:	05/05/2010
Next Status:	540 - Print Pick	Scheduled Pick Date:	05/05/2010

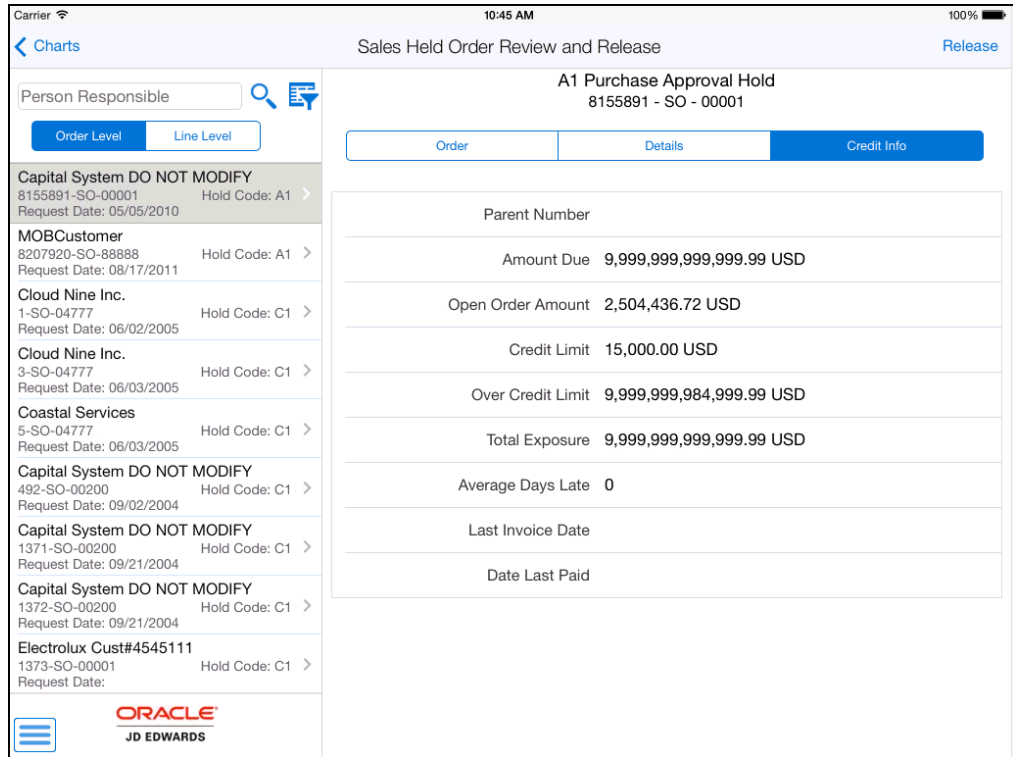
Item:	SSSOC.BLK.S5 - Sports ...	Quantity:	1.0000 EA
Unit Price:	100.0000 USD	Requested Date:	05/05/2010
Last Status:	520 - Enter Order/Receive E...	Promised Delivery Date:	05/05/2010
Next Status:	540 - Print Pick	Scheduled Pick Date:	05/05/2010

Item:	SSSOC.BLK.S6 - Sports ...	Quantity:	1.0000 EA
Unit Price:	100.0000 USD	Requested Date:	05/05/2010
Last Status:	520 - Enter Order/Receive E...	Promised Delivery Date:	05/05/2010
Next Status:	540 - Print Pick	Scheduled Pick Date:	05/05/2010

Item:	SSSOC.BRW.S1 - Sports ..	Quantity:	1.0000 EA
Unit Price:	100.0000 USD	Requested Date:	05/05/2010
Last Status:	520 - Enter Order/Receive E...	Promised Delivery Date:	05/05/2010
Next Status:	540 - Print Pick	Scheduled Pick Date:	05/05/2010

- Tap the Credit Info tab to review the parent number, amount details, credit limit details, total exposure, average days late, last invoice date, and date last paid for the held order.

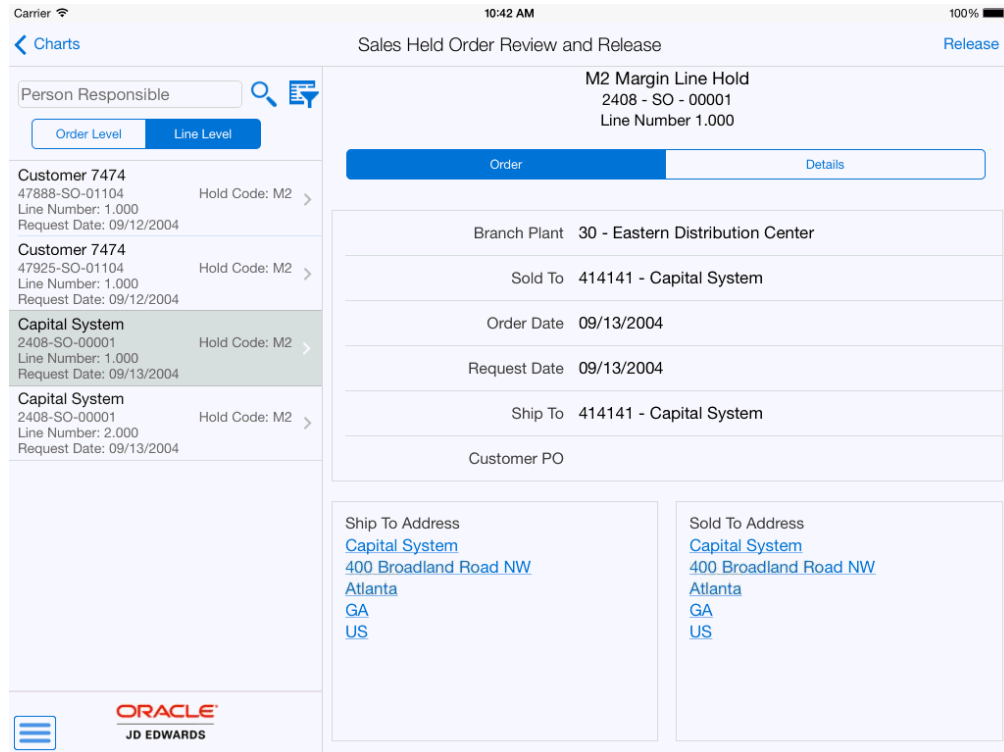
Figure 46-5 Sales Held Order Release Order Level - Credit Info Tab - Tablet



For line-level hold, the system displays Header and Details tabs. Tap the appropriate tab to review details for the selected order:

- Tap the Header tab to review the branch plant, customer address book number and address, order date, request date, ship to, and customer PO details for the sales held orders.

Figure 46-6 Sales Held Order Release Line Level - Header Tab - Tablet



- Tap the Details tab to review the item number, quantity ordered, unit price, extended price, unit cost, extended cost, next and last status, and also the request, promised delivery, and scheduled pick dates for the selected order.

Figure 46–7 Sales Held Order Release Line Level - Details Tab - Tablet

Carrier 10:43 AM 100%

< Charts Sales Held Order Review and Release Release

Person Responsible

Order Level Line Level

Customer 7474
47888-SO-01104
Line Number: 1.000
Request Date: 09/12/2004
Hold Code: M2 >

Customer 7474
47925-SO-01104
Line Number: 1.000
Request Date: 09/12/2004
Hold Code: M2 >

Capital System
2408-SO-00001
Line Number: 1.000
Request Date: 09/13/2004
Hold Code: M2 >

Capital System
2408-SO-00001
Line Number: 2.000
Request Date: 09/13/2004
Hold Code: M2 >

M2 Margin Line Hold
2408 - SO - 00001
Line Number 1.000

Order Details

Item Number 550001 - Item 550001

Quantity Ordered 5.0000 EA

Unit Price 25.0000 USD

Extended Price 125.00 USD

Unit Cost 15.0000 USD

Next Status 540 - Print Pick

Last Status 520 - Enter Order/Receive EDI Order

Request Date 09/13/2004

Promised Delivery Date 09/13/2004

Scheduled Pick Date 09/13/2004

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7. Tap the Release button on the top right to release the order that you are reviewing. The device displays the Password Confirmation screen for authentication. To release an order, you must have the authorized password for the order. Enter the password in the Password field and tap the Release button. If the password is correct, the system releases the hold on the order and displays the Sales Held Order Review and Release screen with the released order missing from the list of sales held orders in the left pane. If your password is not authenticated, the device displays an error message.

Figure 46–8 Sales Held Order Release - Password Confirmation- Tablet

Password Confirmation

Hold Code A1

Order 8155891 - SO - 00001

Amount 1,200.00

Branch Plant 30

Password

Cancel Release

8. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

46.4 Using the Sales Held Order Release Mobile Smartphone Application

The Sales Held Order Release smartphone application enables you to review header, detail, and credit information at order level, and header and details at line level for a specific order. It also enables you to release hold on an order.

Before you can use the application, you must download and install the application from the application store on your device.

46.4.1 Reviewing and Releasing Held Orders Using a Mobile Smartphone

To review the sales held orders:

1. Open the application by tapping the Sales Hold Rel icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. The device displays the list of all sales orders that are on hold, or the list of all sales held orders that the person logged into the application is responsible for releasing, on the Release Held SO home screen, based on the user preference of the mobile smartphone application.

If you want to retrieve the list of orders for a specific address book number, enter the address book number in the Person Responsible field and then tap the Search button. The device displays all orders assigned to the specific address book number.

3. To narrow your search using filter fields, tap the Filter button at the top right of the screen. Specify values in these fields on the Filters screen to filter your records:
 - Person Responsible
 - Branch Plant
 - Customer
 - Order Number
 - Order Type
 - Hold Code
 - Order Date
 - Request Date
 - Promised Delivery Date
4. To continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of sales held orders that are displayed based on your filter values.
 - Saves the filter values that you entered.

The next time you open the filter screen, the system displays the saved filter values.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of sales held orders associated with the last saved filter values, if applicable

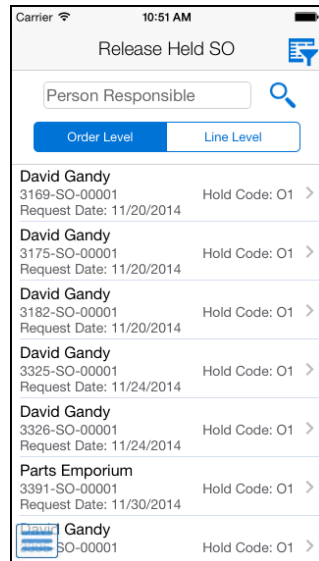
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system returns you to the Release Held SO screen with a list of sales held orders that meet your search criteria. The system displays the order-level or line-level details based on the processing option setting of the application.

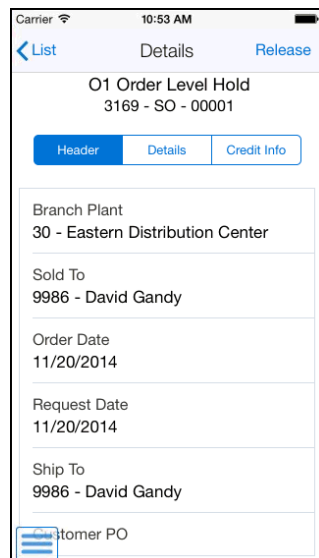
Tap any order in the list to review details.

Figure 46–9 Sales Held Order Release - Home Screen - Smartphone



6. For order-level hold, the system displays order details on Header, Details, and Credit Info tabs. You can only review details on these tabs. Tap the appropriate tab to review details for the selected order:

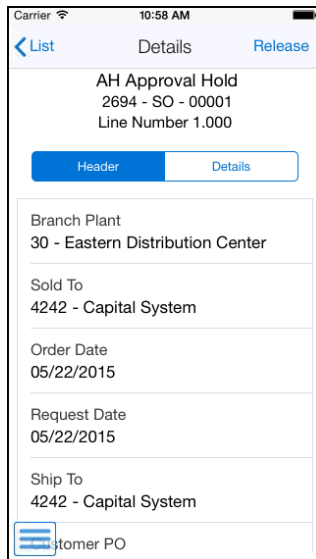
Figure 46–10 Sales Held Order Release - Order-Level Details - Header Tab - Smartphone



- Tap the Header tab to review the branch plant, customer address book number and address, order date, request date, ship to, and customer PO details for the sales held orders.
- Tap the Details tab to review the line numbers associated with the selected order. You can also tap the line number to review the line number details for the selected line.
- Tap the Credit Info tab to review the parent number, amount details, credit limit details, and total exposure for the sales held order.

For line-level hold, the system displays Header and Details tabs. Tap the appropriate tab to review details for the selected order:

Figure 46–11 Sales Held Order Release - Order-Level Details - Header Tab- Smartphone



- Tap the Header tab to review the branch plant, customer address book number and address, order date, request date, ship to, and customer PO details for the sales held orders.
 - Tap the Details tab to review the item number, quantity ordered, unit price, extended price, unit cost, extended cost, next and last status, and the promised delivery and scheduled pick dates for the selected order.
7. Tap the Release button on the top right to release the order that you are reviewing.
 8. The device displays the Password Confirmation screen for authentication. To release order, you must have the authorized password for the order. Enter the password in the Password field and tap the Release button. If the password is correct, the system releases the hold on the order and displays the Release Held SO home screen with the released order missing from the list of sales held orders. If your password is not authenticated, the device displays an error message.

Figure 46-12 Sales Held Order Release - Password Confirmation- Smartphone

Password Confirmation	
Hold Code	L1
Order	3332-SO-00001
Line Number	2.000
Amount	1,200.00
Branch Plant	30
Password	<input type="text"/>
Cancel	Release

9. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Sales Order Counts Mobile Applications

This chapter discusses these topics:

- [Section 47.1, "Sales Order Counts Mobile Applications Overview"](#)
- [Section 47.2, "Setting Up the Sales Order Counts Mobile Applications"](#)
- [Section 47.3, "Using the Sales Order Counts Mobile Tablet Application"](#)
- [Section 47.4, "Using the Sales Order Counts Mobile Smartphone Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

Holding, Releasing, and Reviewing Orders in the JD Edwards EnterpriseOne Applications Sales Order Management Guide.

47.1 Sales Order Counts Mobile Applications Overview

You use the Sales Order Counts enterprise mobile applications to inquire on the orders associated with a specific branch/plant in your organization. The intended user of these applications is a branch or warehouse manager who needs to determine what orders are awaiting fulfillment at their branch, plant, or location. However, the application can be used by any authorized personnel with a need to review order counts and information.

Using these applications, users can review details about orders, and can add text notes to the order. Besides the notes, all information for the orders is read-only.

Using these applications, you can select the different tabs to view order information based on the following criteria:

- Orders by status.
- Orders by hold code.
- Orders by promised ship date.
- Orders by item.

When you set up the applications, you specify in the processing options which version of the Sales Order Entry (P42101) and Customer Service Inquiry (P4210) programs that the system uses to retrieve and display sales orders. The mobile applications use the

values in the specified versions of the processing options to determine the branch/plant of the selected user. If the system cannot determine a branch/plant, the application prompts the user to enter a branch/plant value upon entry. All inquiries done with these applications are specific to a branch/plant.

After installing the application, users can set up user preferences to specify how they want to view data on the Orders by Promised Ship tab. In addition to the 3 standard values shown on the tab (Past Due, Due Today, and Due Tomorrow), users can specify up to 3 additional due date values. These additional values are configurable, and can be used to show orders that are due within a specified number of days. For example, you might choose to set up the following 3 additional due date values:

- Due in 5 Days
- Due in 10 Days
- Due in 30 Days

This table lists the applications that are available to review sales order information:

Type of Application	Additional Information
Base EnterpriseOne Application	Use the Sales Order Entry (P42101) application in the JD Edwards EnterpriseOne system to review sales orders. See <i>Holding, Releasing, and Reviewing Orders in the JD Edwards EnterpriseOne Applications Sales Order Management Guide</i> .
Tablet Application	Mobile Sales Order Counts - Tablet (M42062) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Sales Counts
Smartphone Application	Mobile Sales Order Counts - Phone (M42063) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Sales Counts

Before using the Sales Order Counts tablet or smartphone application, you must perform the following setup tasks:

- Set up processing options for the Mobile Sales Order Counts - Tablet application.
- Set up processing options for the Mobile Sales Order Counts - Phone application.
- Set up user preferences to control the display of data on the Orders By Promised Ship tab.

47.1.1 Differences and Limitations: Sales Order Counts Mobile Applications

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

The Sales Order Count mobile enterprise applications are intended to provide users with review capabilities for sales orders. With the exception of the ability to add a note to an order, these applications do not support the entry or update of sales orders.

Pie Chart Pieces Too Small to Tap

If the charts you are viewing with this application include data for many different types of orders, the pieces of the charts might be small and it might be difficult to tap the correct piece of the chart. To view the information that you want, tap any piece of the chart, and then select the type of information from the drop down menu on the next screen. The drop down menu will contain all values displayed in the chart, enabling you to select the correct value.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

47.2 Setting Up the Sales Order Counts Mobile Applications

Before using the Sales Order Counts mobile applications, you must set processing options and user preferences. Processing options are typically set by the system administrator before the mobile application is rolled out to the organization. User preferences can be set by each individual user of the application.

47.2.1 Setting Processing Options for the Mobile Sales Order Counts - Tablet Application (M42062)

You use processing options to specify default processing information for a program.

47.2.1.1 Versions

1. Manage Existing Orders (P42101) Version

Use this processing option to specify the version of the P42101 that the Order Counts mobile tablet application uses when retrieving and processing order information. If you leave this option blank, the system uses version ZJDE0001.

2. Sales Order Detail (P4210) Version

Use this processing option to specify the version of the P4210 that the Order Counts mobile tablet application uses when retrieving and processing order information. If you leave this option blank, the system uses version ZJDE0001.

3. User Defined Codes (P0004A) Version

Use this processing option to specify the version of the P0004A that the Order Counts mobile tablet application uses when retrieving and processing order information. If you leave this option blank, the system uses version ZJDE0001.

4. Business Units (P0006) Version

Use this processing option to specify the version of the P0006 that the Order Counts mobile tablet application uses when retrieving and processing order information. If you leave this option blank, the system uses version ZJDE0001.

47.2.2 Setting Processing Options for the Mobile Sales Order Counts - Phone Application (M42063)

You use processing options to specify default processing information for a program.

47.2.2.1 Versions

1. Manage Existing Orders (P42101) Version

Use this processing option to specify the version of the P42101 that the Order Counts mobile smartphone application uses when retrieving and processing order information. If you leave this option blank, the system uses version ZJDE0001.

2. Sales Order Detail (P4210) Version

Use this processing option to specify the version of the P4210 that the Order Counts mobile smartphone application uses when retrieving and processing order information. If you leave this option blank, the system uses version ZJDE0001.

3. User Defined Codes (P0004A) Version

Use this processing option to specify the version of the P0004A that the Order Counts mobile smartphone application uses when retrieving and processing order information. If you leave this option blank, the system uses version ZJDE0001.

4. Business Units (P0006) Version

Use this processing option to specify the version of the P0006 that the Order Counts mobile smartphone application uses when retrieving and processing order information. If you leave this option blank, the system uses version ZJDE0001.

47.2.3 Setting User Preferences for the Sales Order Counts Mobile Applications

After installing the application, users can set up user preferences to specify how they want to view data on the Orders by Promised Ship tab. In addition to the 3 standard values that appear on the Orders by Promised Ship tab (Past Due, Due Today, and Due Tomorrow), users have 3 additional values that they can configure to display different due date ranges on the screen.

For example, a user might choose to display these six due date values on the Orders by Promised Ship Date tab:

- Past Due (hard coded)
- Due Today (hard coded)
- Due Tomorrow (hard coded)
- Due in 5 Days (configurable)
- Due in 10 Days (configurable)
- Due in 30 Days (configurable)

Note: When you enter your user preference information for the additional date values, you must enter the number of days in ascending order. For example, to show orders due in the next 5, 10, and 30 days, you must enter 5 in the Due in X Days (1) preference, 10 in the Due in X Days (2) preference, and 30 in the Due in X Days (3) preference. Entering the numbers out of order, for example 5, 30, 10, would result in unreliable data.

Also note that these ranges are not cumulative. For example, if you set up the additional due date values as due in 5, 10, and 30 days, your application would display the following:

- Past Due
- Due Today
- Due Tomorrow
- Due in 5 Days

This category represents orders due the day after tomorrow, through 5 days from the system date.

- Due in 10 Days

This category represents orders due in 6 to 10 days from the system date.

- Due in 30 Days

This category represents orders due in 11 to 30 days from the system date.

To set user preferences on your device:

- Access the Settings on your mobile device, and select the Order Counts application.

For instructions about accessing the settings on your mobile device, see the user documentation for your device.

- Complete the following fields with a numeric value:
 - Due in X Days (1):
 - Due in X Days (2):
 - Due in X Days (3):

If you leave any of these options blank, the system does not display that category on the Orders by Promised Ship screen.

47.3 Using the Sales Order Counts Mobile Tablet Application

The Sales Order Counts mobile tablet application enables you to view sales orders for a specified branch/plant. You can also add notes to a sales order using this application.

Before you can use the application, you must download and install the Sales Counts application from the application store on your device.

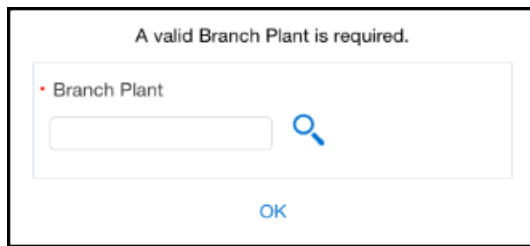
To open the application, tap the Sales Counts icon and log in.

47.3.1 Reviewing Sales Orders Using a Mobile Tablet

To view sales order information on your mobile tablet device:

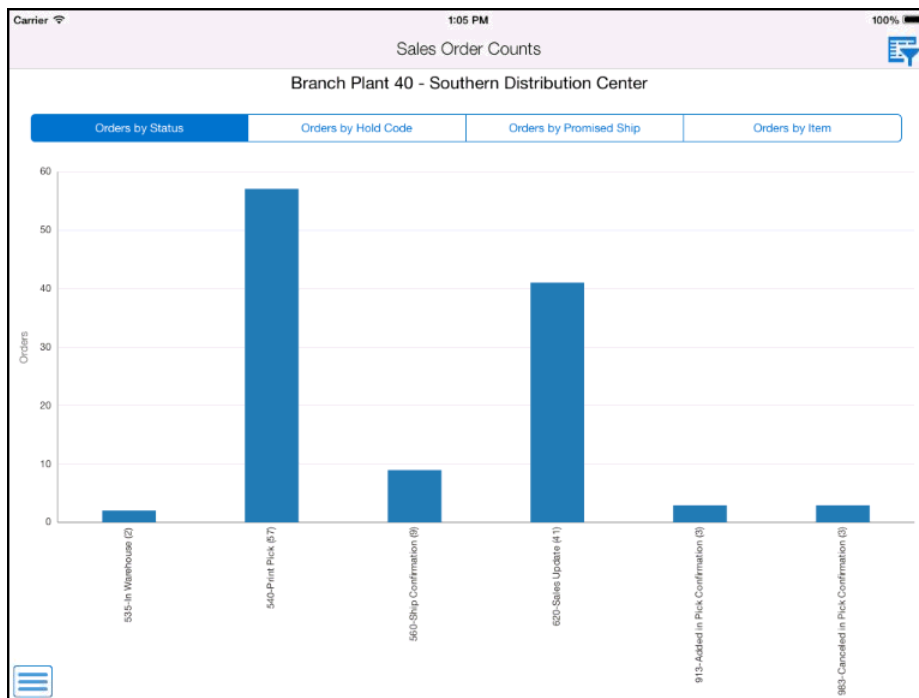
1. Open the application by tapping the Sales Counts icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. The application determines which branch/plant to use based on the processing options. If the application cannot determine which branch/plant to use, you must enter a valid branch/plant, and then tap OK.

Figure 47–1 Enter Valid Branch/Plant



3. The system loads the order information for the specified branch/plant. On the Orders by Status tab, you can review the chart to see the number of orders in the specified branch/plant that are at each status.

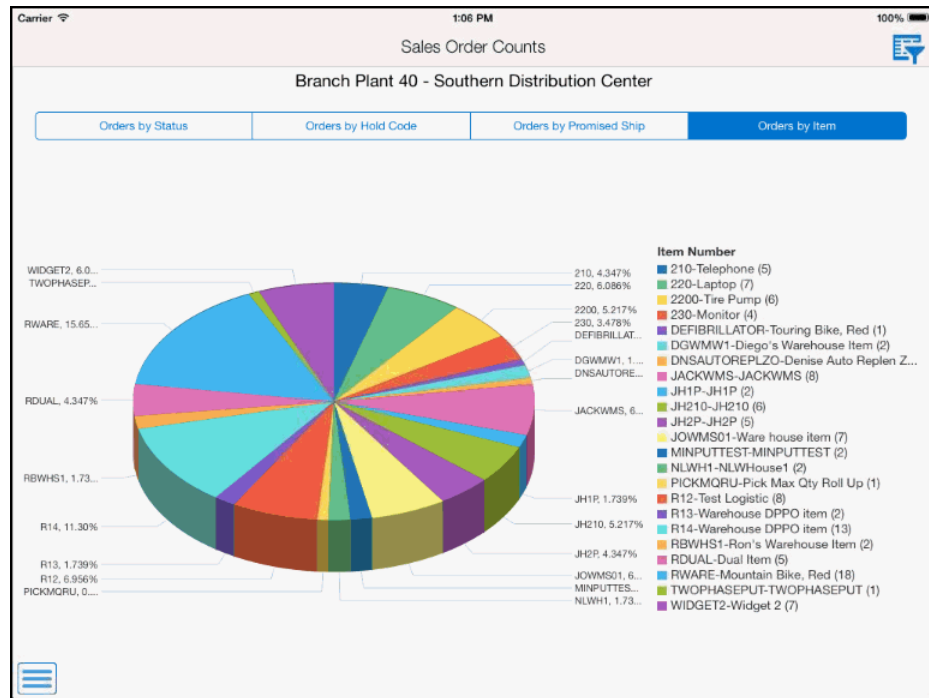
Figure 47–2 Orders by Status Tab



4. You can also view charts for sales orders by the following criteria by tapping the corresponding tab on the screen:
 - Orders by Hold Code
 - Orders by Promised Ship Date

- Orders by Item

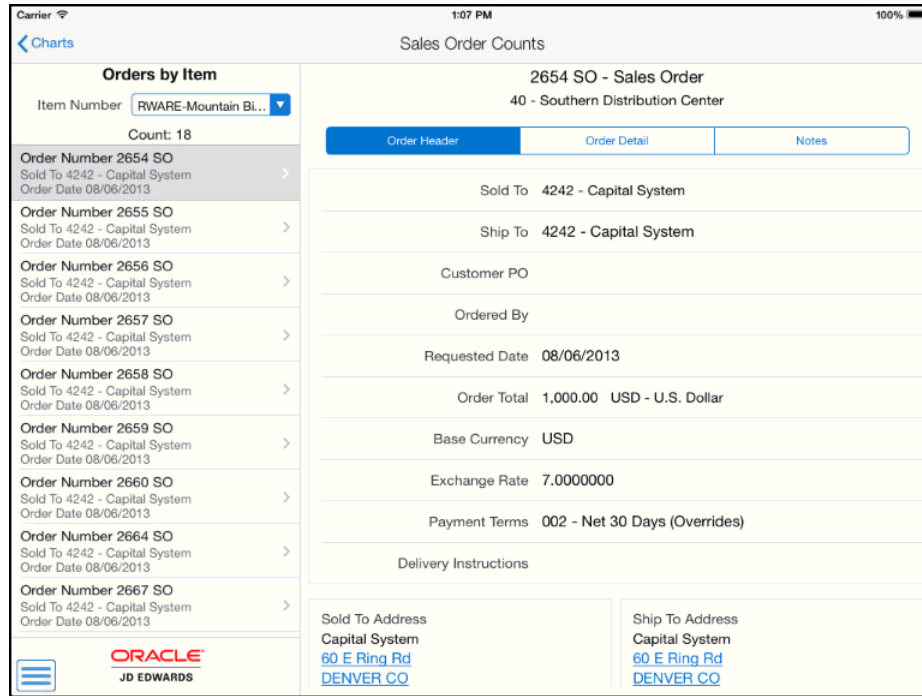
Figure 47–3 Orders by Item Tab



- To filter your list of orders, tap the Filter button, enter your filter criteria, and then click Apply. The list of orders is updated to reflect your filter criteria.
- From any of the chart screens, tap and hold a bar or wedge in the chart to view a pop up of information about that set of orders. Notice that the piece of the chart, and the corresponding entry in the legend are highlighted.

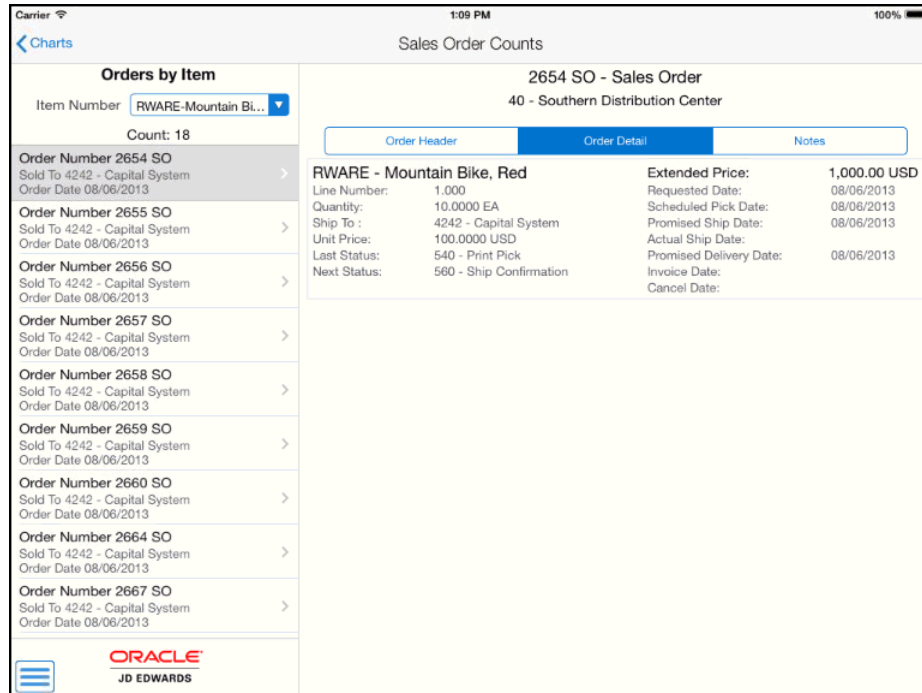
To view additional details about the orders associated with that piece of the chart, tap the bar or wedge in the chart. The system displays a list of orders based on the selected piece of the chart. The first order is automatically selected, and the order header information is displayed on the right side of the screen.

Figure 47-4 List of Orders by Item



- To view the details of the order, tap the Order Detail tab. The system displays each line of the order.

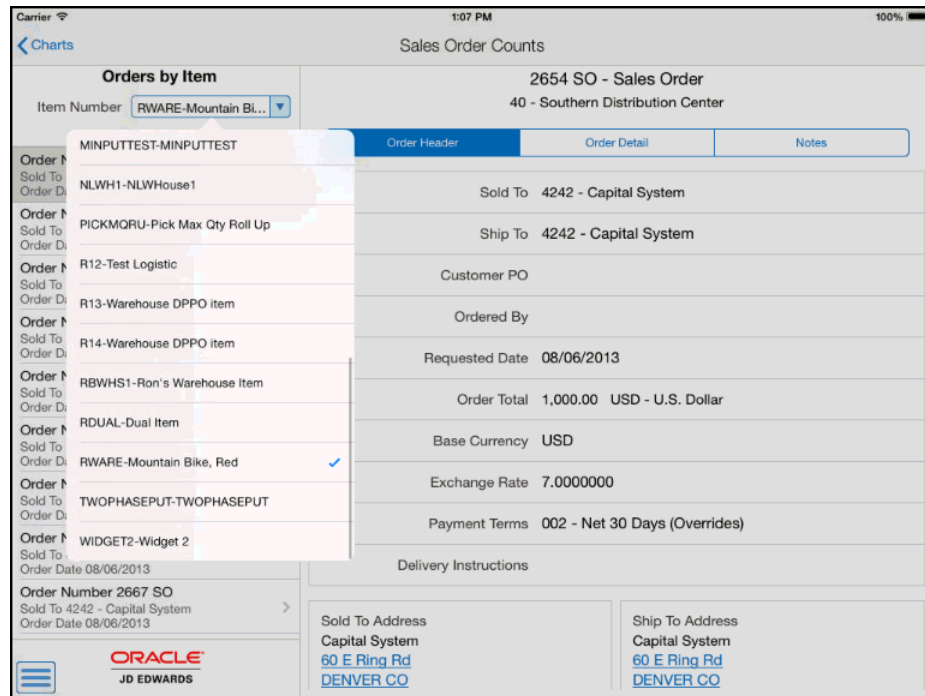
Figure 47-5 Order Detail Tab



- To review or add notes for the order, tap the Notes tab. Note that you cannot update existing notes. You can only append additional notes to the order.

- To view a different set of orders, select a different value from the drop down menu.

Figure 47–6 Item Number Drop Down Menu



- To return to the previous screen, tap the Charts button at the top left of the screen.
- To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

47.4 Using the Sales Order Counts Mobile Smartphone Application

The Sales Order Counts mobile smartphone application enables you to view sales orders counts for a specified branch/plant. You can also add notes to a sales order using this application.

Before you can use the application, you must download and install the Sales Counts application from the application store on your device.

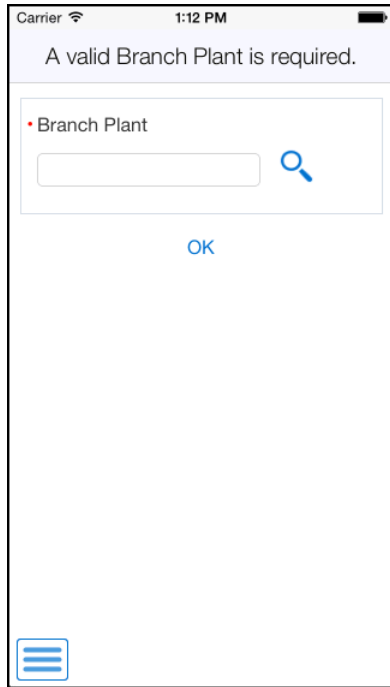
To open the application, tap the Sales Counts icon and log in.

47.4.1 Reviewing Sales Orders Using a Mobile Smartphone

To view sales order information on your mobile smartphone device:

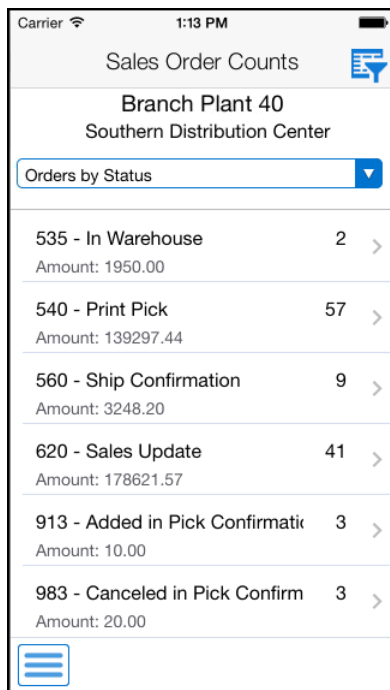
- Open the application by tapping the Sales Counts icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
- The application determines which branch/plant to use based on the processing options. If the application cannot determine which branch/plant to use, you must enter a valid branch/plant, and then tap OK.

Figure 47-7 Enter Valid Branch/Plant



3. The system loads the order information for the specified branch/plant. By default, the Orders by Status tab is selected, and a list of order statuses, and their associated order counts appears on the screen.

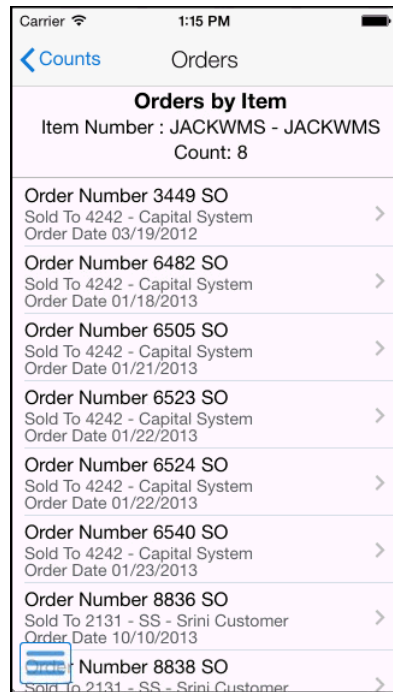
Figure 47-8 Orders by Status Tab



4. To filter your list of orders, tap the Filter button, enter your filter criteria, and then click Apply. The list of orders is updated to reflect your filter criteria.

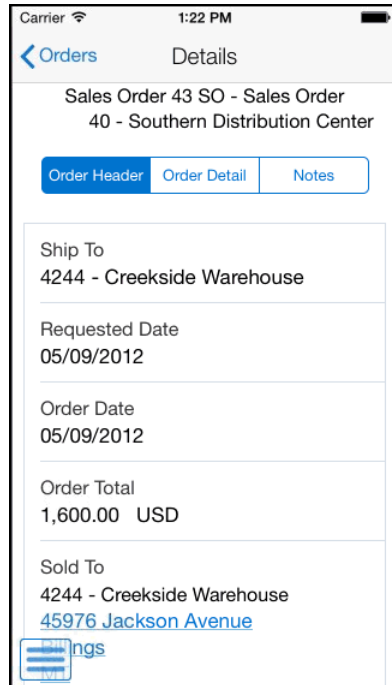
5. You can change your view by selecting one of these tabs from the drop down menu at the top of the screen:
 - Orders by Hold Code
 - Orders by Promised Ship Date
 - Orders by Item
6. To view a list of orders in a selected category, tap a record in the bottom part of the screen. The system displays a list of orders in that category.

Figure 47–9 List of Orders by Item



7. To view the details of an order, tap the record. The system displays the Details screen with the Order Header tab selected.

Figure 47-10 Order Details: Order Header



8. To view details of the order, tap the Order Detail tab.
9. To review or add notes to the order, tap the Notes tab. Note that you cannot update existing notes, you can only append new notes to the order.
10. To return to the previous screen, tap the Order button at the top left of the screen.
11. Tap the Counts button at the top left of the screen to return to the Home screen.
12. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Order Entry Mobile Application

This chapter discusses these topics:

- [Section 48.1, "Order Entry Mobile Application Overview"](#)
- [Section 48.2, "Setting Up the Order Entry Mobile Application"](#)
- [Section 48.3, "Creating Sales Orders Using the Order Entry Mobile Tablet Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile application discussed in this chapter, see these topics in the JD Edwards EnterpriseOne Sales Order Management Implementation Guide:

- Entering Sales Orders
 - Creating Order Templates
 - Setting Up Customer Information
 - Processing Prepayments
-
-

> **Tutorial:** [Click here to view a recording of this feature](#)

48.1 Order Entry Mobile Application Overview

You use the Order Entry mobile application to provide your sales force with a front-end order entry interface that they can use on a mobile tablet device. Using the Order Entry mobile tablet application, users can:

- Locate items in product catalogs.
- View item details, such as pictures, description, available quantity, and price.
- Add items to an order by selecting from a catalog, manually typing in an item, or scanning the item.
- Update the quantity and unit of measure.
- View order details and subtotals.

- Enter customer and contact information at checkout.
- Select the payment method to complete the order.

Note: The Order Entry mobile application does not allow you to create work orders, configured orders, or purchase orders.

The application supports stock items (line type S) only.

This table lists the applications that are available to enter sales orders:

Type of Application	Additional Information
Base EnterpriseOne Application	<p>For the Order Entry mobile tablet application, there is no specific JD Edwards EnterpriseOne base program that performs the same function. This mobile application uses features and functionality from several different base applications to enable sales personnel to create orders for customers while they are away from the office.</p> <p>The mobile application is based on the Sales Order Entry Inquiry and Confirmation program (P42105), which was created specifically for use with this mobile application.</p>
Tablet Application	<p>Mobile Order Entry - Tablet (M42010)</p> <p>To download the application to your tablet, search on the following text in the application store:</p> <ul style="list-style-type: none"> ■ JD Edwards Order Entry

Before using the Mobile Order Entry tablet application, you must perform the following setup tasks:

- Set processing options for the Sales Order Model program (P4210).
- Set processing options for the Sales Order Entry program (P42101).
- Set processing options for the Sales Order Entry Inquiry and Confirmation program (P42105).
- Set processing options for the Mobile Order Entry - Tablet program (M42010)
- Set up the email confirmation process.

This step is required only if you are using the email confirmation feature.
- Set up catalogs to display in the mobile application.
- Set up a default Branch/Plant for each user of the mobile application.
- Set up user preferences in the mobile application.
- Set up the prepayments processing options for these programs: Sales Order Entry (P4210), Sales Order Entry (P42101), Credit Check (P42050), Print Invoices (R42565), and Sales Update (R42800).

This step is required to process the authorization information received from the third-party credit card plug-in when the payment mode is by credit card.

48.1.1 Differences and Limitations: Mobile Order Entry

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

For the Order Entry mobile tablet application, there is no specific JD Edwards EnterpriseOne base program that performs the same function. This mobile application uses features and functionality from several different base applications to enable sales personnel to create orders for customers while they are away from the office.

Barcode Scanning

This application is designed to accept data entry from a barcode scanner. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that include data for multiple fields.

Additionally, you must specify, in the processing options of the M42010 program, which item number field is used for scanning. You can specify the 2nd Item Number, 3rd Item Number, or Short Item Number.

For example, if you want users to be able to scan the item number with their device, and you have selected *2nd Item Number* in the processing options, you must create a barcode that represents only the value in the 2nd Item Number field for that item. The barcode cannot include both the item number and quantity, for example.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes Inc., and does not require or recommend that you use this service to create your barcodes.

Item Image Display

If you want images from the Item Master to display in the Order Entry mobile application, the item image must be attached to the item master as the first attachment. If the first attachment in the item master is not an image file, the Order Entry mobile application displays a default image next to the item.

Credit Card Processing

This application is designed to integrate with a third-party solution that can process credit card transactions at the point of sale. The third party referred to here is a third-party hardware device and a software plug-in written for the specific hardware device.

The third-party solution that you select must be able to perform all of the processing, including scanning the credit card, transmitting the credit card information to the credit card bank, and receiving purchase authorization from the bank. The third party must provide security to protect the credit card information. The Oracle JD Edwards EnterpriseOne system does not interact with or store the customer's credit card information.

The tablet application interfaces with the third party only to:

- Provide information (sales order header and order totals) necessary to process the transaction.
- Receive the authorization information (transaction date, transaction amount, and authorization code) returned from the third party.

The JD Edwards EnterpriseOne system stores the authorization information in the Prepayments Transaction table (F004201) to support processing the sales order through the sales update and accounts receivable processes.

For additional information, refer to the document "JD Edwards EnterpriseOne Mobile Sales Third Party Plug-In" on the Oracle Learning Library site.

https://apexapps.oracle.com/pls/apex/f?p=44785:24:0:::P24_CONTENT_ID,P24_PREV_PAGE:11488,1

48.2 Setting Up the Order Entry Mobile Application

Before using the Order Entry mobile tablet application, you must complete these steps:

1. Set up the email confirmation process.
This step is required only if you are using the email confirmation feature.
2. Set processing options for the Sales Order Entry program (P4210).
3. Set processing options for the Sales Order Entry program (P42101).
4. Set processing options for the Sales Order Entry Inquiry and Confirmation program (P42105).
5. Set processing options for the Mobile Order Entry - Tablet program (M42010).
6. Set User-Specific Information for the Order Entry mobile tablet application.
This step can be completed in any order, but must be completed before the user logs into the application.
7. Set the prepayments processing options for these programs: Sales Order Entry (P4210), Sales Order Entry (P42101), Credit Check (P42050), Print Invoices (R42565), and Sales Update (R42800).

This step is required to process the authorization information received from the third-party credit card plug-in when the payment mode is by credit card.

48.2.1 Setting Up the Email Confirmation Process

If you have set up the Order Entry mobile tablet application to send email confirmation messages upon checkout, you must set up the message notification process. The Order Entry mobile application publishes email confirmation messages using an Embedded BI report. The setup includes the following tasks which must be completed in the order specified:

- Adding the R42105.rtf template.
- Creating the report definition.
- Associating the R42105 version with report definition.
- Setting the processing options for the P42105 program.

For additional information about using embedded Oracle Business Intelligence, see Embedded Oracle Business Intelligence for JD Edwards EnterpriseOne.

48.2.1.1 Adding the R42105.rtf Template

To add the template:

1. Start the BI Publisher Object Repository (P95600).
2. Click Add and complete the following fields as directed:

- Object Name: TP42105TR01
 - Object Description: Sales Order Confirmation Email Template
 - Object Type: TR RTF Template
 - Product Code: 42B
 - Product System Code: 42B
 - Object Region: Enter the country code. For example, enter US.
 - Object Language: Enter the language code. For example, enter EN.
3. Click OK, and the file browser window appears.
 4. Select the version of the RTF template *R42105.rtf* that you want to use.
 5. In the Effective Dates section, complete the Start Date field, leave the End Date field blank, and then click OK to save the record.

48.2.1.2 Creating the Report Definition

To create the report definition:

1. Start the BI Publisher Report Definitions (P95620).
2. Click Add and complete the following fields as directed:
 - Report Definition: RD4210501
 - Blind Submission: Select this option.
 - Description: Enter a description.
 - Product Code: 42B
 - Product System Code: 42B
 - Source Type: 1 (Batch Version)
 - Source UBE: R42105
 - Source Version: XJDE0001
 - Template Name: TP42105TR01
3. Click Next.
4. Select the Data Driven Delivery and E-mail Address options.
5. On the Bursting/Delivery tab, complete the following fields as directed:
 - Data Driven Delivery: Select this option.
 - E-mail Address: Select this option.
 - E-mail Address field: ./EmailAddressow_ID44
 - Language: Enter the language code. For example, enter EN
 - Data Driven Recipient: EmailAddressow_ID44
 - Data Item for Subject and Body: 42SOCONF
6. Click the Define Values button.
7. In the Structure Member Value field, enter /SOConfKey_ID25 and then click OK.
8. Click End to save the report definition.

48.2.1.3 Associating the R42105 Version with the Report Definition

To associate the version with the report definition:

1. From Batch Versions (P98305) inquire on R42105 and select version XJDE0001.
2. Check out the version. Use the Advanced option from the Row menu to complete this step.
3. From the Row menu, select Version Detail.
4. From the Form menu, select Report Definition.
5. In the Report Definition field, enter RD4210501 and then click OK until you return to the Work With Batch Versions form.
6. Check the version in. Use the Advanced option from the Row menu to complete this step.

48.2.2 Setting Processing Options for the Sales Order Entry Program (P4210)

This section discusses only those processing options that are specific to mobile processing. For additional information about these processing options, see Setting Processing Options for the Sales Order Entry Program (P4210).

In order for the Mobile Order Entry application to process order information, you must set the following processing options as specified.

- On the Prepayment tab, set option 1 (Prepayment Processing) to 1 to enable prepayment processing updates to the EnterpriseOne database.
- On the Commitment tab, set option 1 (Activate Availability Checking) to 1 enable the mobile application to perform availability checking.

After you set up the mobile version of the P4210, you then enter the version in the processing options for the P42101.

48.2.3 Setting Processing Options for the Sales Order Entry Program (P42101)

This section discusses only those processing options that are specific to mobile processing. For additional information about these processing options, see Setting Processing Options for the Sales Order Entry Program (P42101).

In order for the Mobile Order Entry application to process order information, you must set the following processing options as specified.

- On the Versions tab, set option 1 (Sales Order Model Version) to the version of the P4210 that you set up for mobile processing.
- On the Task Flow tab, set option 1 (Display Header or Detail) to blank. This option is required for the mobile application to function properly.

After you set up the mobile version of the P42101, you then enter the version in the processing options for the M42010.

48.2.4 Setting Processing Options for the Sales Order Entry Inquiry and Confirmation Program (P42105)

You use processing options to specify default processing information for a program.

48.2.4.1 Process

1. Send Sales Order Email Confirmation

Use this processing option to specify whether the mobile application initiates an email notification to the customer upon checkout. Values are:

Blank: Do not send confirmation.

1: Send confirmation.

2. Sales Order Email Confirmation Version (R42105)

Use this processing option to specify the version of the R42105 program that the mobile application uses when sending email confirmation messages. If you leave this option blank, the system uses version XJDE0001.

48.2.5 Setting Processing Options for the Mobile Order Entry - Tablet Program (M42010)

You use processing options to specify default processing information for a program.

48.2.5.1 Default

1. Default Customer Address Book Number (Required)

Use this processing option to specify the default customer number that is used by the mobile application. You might choose to set up a generic customer and enter that customer in this processing option. Using a generic customer enables the sales representative using the application to browse through products without entering customer details.

2. Select the Item Number Used for Device Scanning

Use this processing option to specify which item number your item bar codes are associated with for scanning purposes. Values are:

Blank: 2nd Item Number

1: Third Item Number

2: Short Item Number

48.2.5.2 Versions

1. Sales Order Entry Version (P42101)

Use this processing option to specify the version of the P42101 program that the mobile application calls. If you leave this option blank, the application uses version ZJDE0001.

2. Address Book Version (P01012)

Use this processing option to specify the version of the P01012 program that the mobile application calls. If you leave this option blank, the application uses version ZJDE0001.

3. Customer Master (P03013)

Use this processing option to specify the version of the P03013 program that the mobile application calls. If you leave this option blank, the application uses version ZJDE0001.

4. Contact Information (P01111)

Use this processing option to specify the version of the P01111 program that the mobile application calls. If you leave this option blank, the application uses version ZJDE0001.

5. Sales Order Entry Inquiry and Confirmation (P42105)

Use this processing option to specify the version of the P42105 program that the mobile application calls. If you leave this option blank, the application uses version ZJDE0001.

6. Order Template Revisions (P4015)

Use this processing option to specify the version of the P4015 program that the mobile application calls. If you leave this option blank, the application uses version ZJDE0001.

48.2.6 Setting Up Catalogs to Display in the Order Entry Mobile Application

For the Order Entry mobile tablet application to function as designed, users must create catalogs using the P4015 program before using the application. Catalogs are used to group items. Each catalog that is set up to display for the selected customer is listed, in tab format, across the top of the mobile application. Users can tap the tab to view the items in that catalog.

For instruction on setting up catalogs, see *Creating Order Templates*.

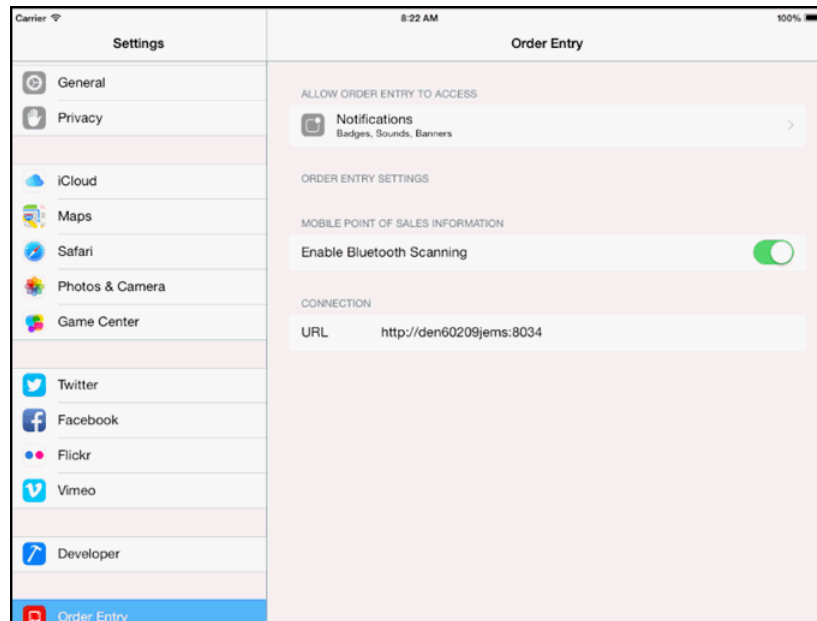
48.2.7 Setting Up User-Specific Information for the Order Entry Mobile Application

Before your employees can log into and use the mobile Order Entry application, each user must have a default branch/plant setup. For instructions on completing this task, see *Setting Up Default Location Information*.

Additionally, each user can specify their own user preferences when they install the application on their device. To set user preferences, access the settings on your mobile device, select the application that you want to configure.

For the Order Entry mobile tablet application, you use preferences to determine which scanning method you are using with the application. If you are using your device camera, the preference must be turned off. If you are using a Bluetooth device to scan items, you must turn the preference on.

If you set up a customized scanning process, the application does not use this preference.

Figure 48–1 Order Entry User Preferences

For instructions about accessing the settings on your mobile device, see the user documentation for your device.

Note: Entering connection and URL information is discussed in a separate task. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

48.3 Creating Sales Orders Using the Order Entry Mobile Tablet Application

The Order Entry mobile tablet application provides your sales personnel with a mobile checkout application that enables them to create sales orders while away from the office.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Order Entry icon and log in.

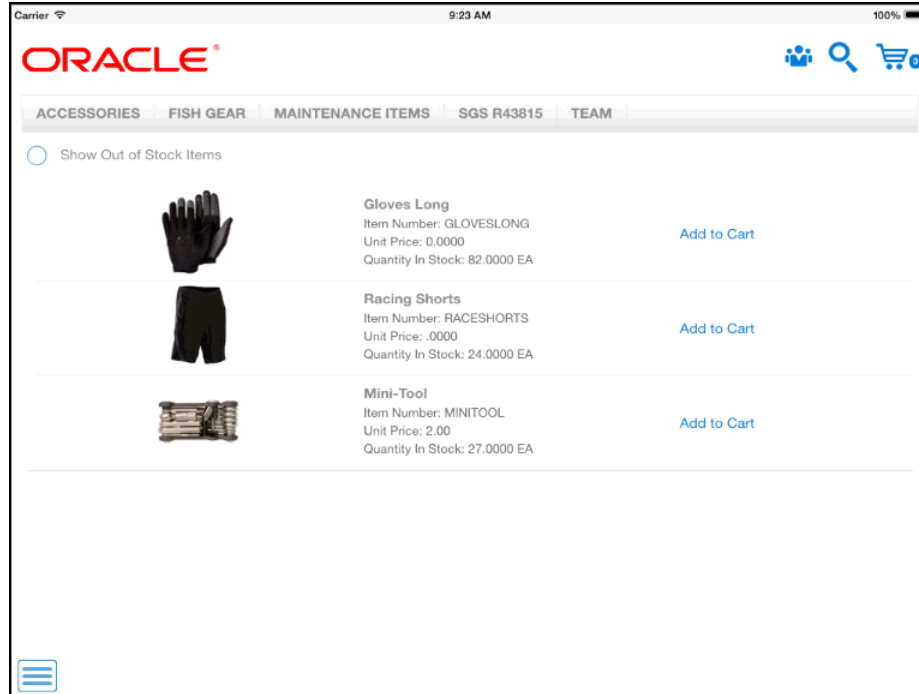
48.3.1 Entering a Sales Order with the Mobile Order Entry Tablet Application: Non-Scanning Method

To enter a sales order:

1. Open the application by tapping the icon on your device, and then log in. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. When the application opens, all of the available product catalogs are displayed at the top of the screen in tab format. You can scroll left or right through the tabs by swiping across your screen on the tabs. The tabs that are displayed when you log in are the catalog templates that are set up in the Customer Template Revisions program (P4015) for the default customer. The default customer is defined in the processing options of the mobile application.

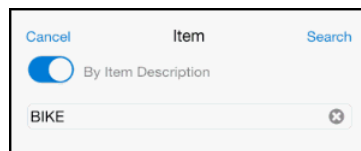
3. To select a specific customer, and display only those catalogs associated with that customer, tap the customer button at the top right of the screen. Search for and select the customer. The application returns you to the home screen and displays the catalogs associated with the selected customer.

Figure 48–2 Order Entry Home



4. Tap one of the tabs to see the items in that catalog.
If you are not sure which tab contains the item you are searching for, tap the Search button at the top right of the screen to search for your item. Enter your search criteria, and then tap the Search button. Use the toggle button to determine whether you are searching by item number or by item description.

Figure 48–3 Item Search

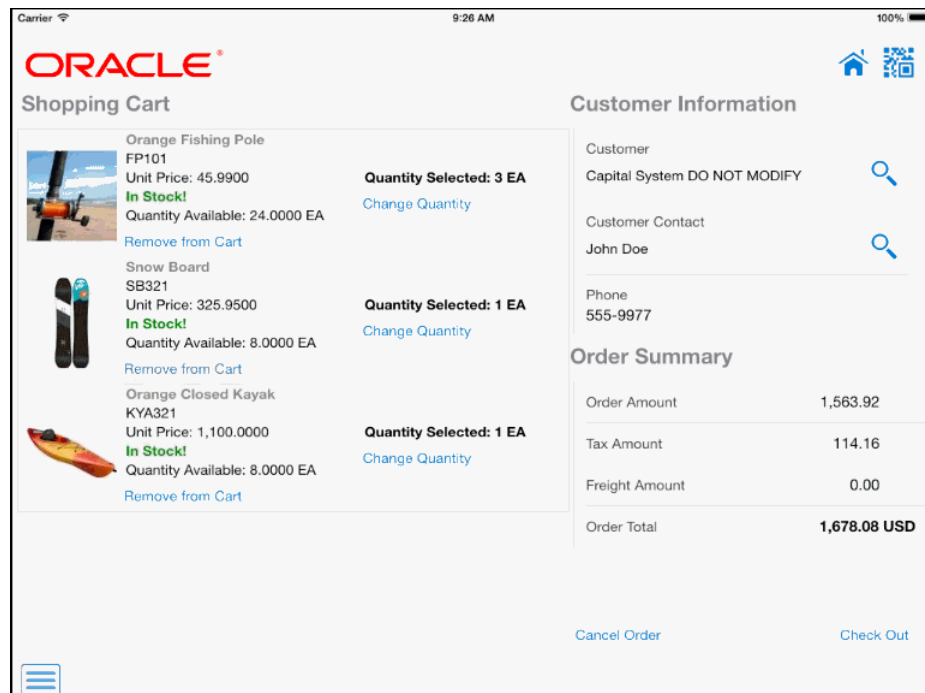


5. To view out of stock items, tap the Show Out of Stock Items option.
6. To view a larger image of the item, tap the image in the list.
7. To add an item to the shopping cart, tap the Add to Cart button.
For instructions on scanning items into the shopping cart, see [Section 48.3.2, "Scanning Items Into a Sales Order Using the Order Entry Mobile Tablet Application"](#)
8. On the Quantity window, specify the quantity and unit of measure, and then tap Add to Cart. Note that in order to select a unit of measure, you must have set up units of measure for that item using the Item Unit of Measure Conversions program (P41002). If no setup exists, you will not have unit of measure options in

the drop down list. Also note that the Shopping Cart button at the top right of the screen displays the number of records in the shopping cart.

9. When you have finished adding items to the shopping cart, tap the Shopping Cart button at the top right of the screen.
10. On the Shopping Cart screen, you can:
 - Remove an item from the cart by tapping the Remove from Cart button.
 - Change the item quantity by tapping the Change Quantity button. On the Quantity window, enter the new quantity information and then tap Save.
 - Change the customer by tapping the Search button next to the Customer field. Search for and select a new customer. The application returns you to the Shopping Cart screen with the new customer information.
 - Change the contact person by tapping the Search button next to the Customer Contact field. The system displays a list of available contacts for the selected customer. Select the contact you want to associate with the order. The primary contact, as defined in the customer master, is displayed by default.
 - Cancel the order by tapping the Cancel Order button.

Figure 48–4 Shopping Cart



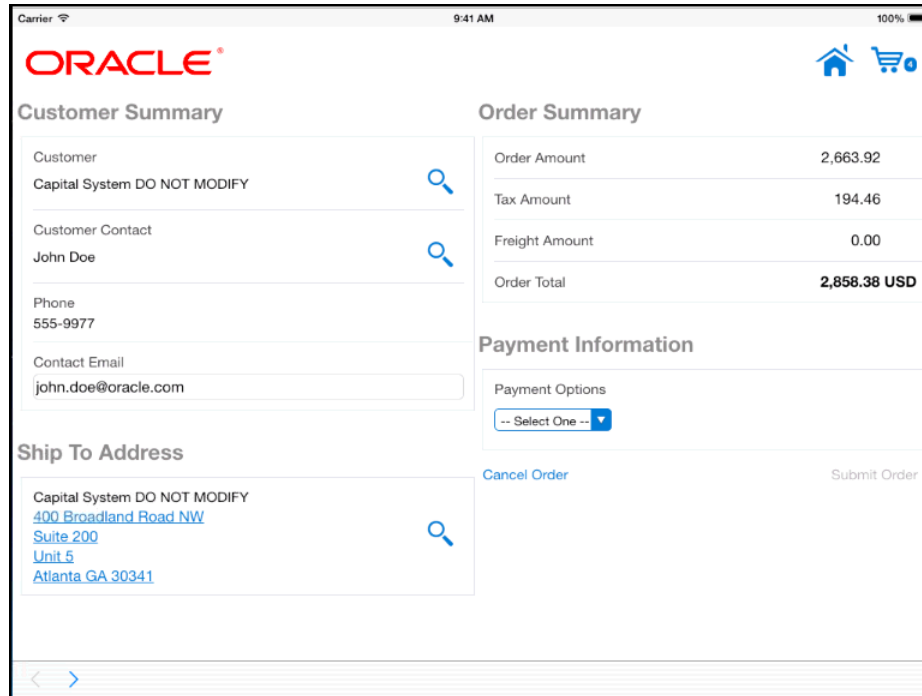
11. Review and update the information in the shopping cart, and then tap the Check Out button at the bottom right.

The system performs all pricing calculations for the selected customer.

12. On the check out screen, you can:
 - Update the customer. If you change the customer, the system recalculates the price based on the customer setup.
 - Update the contact email address.

- Select a new Ship To address by tapping the Search button next to the Ship To Address section. Select one of the available addresses to update the order. You must select from the available options. You cannot manually enter a ship to address.

Figure 48–5 Check Out



13. Select one of these options from the Payment Options drop down list:
 - Check

If you select this option, you must enter the customer’s check number. This check number is updated to the Sales Order Prepayments table (F004201) and is used for post-authorization processing.

Note that your processing options must be set to enable prepayments to use this option.
 - Bill Later

If you select this option, you can optionally enter the customer’s purchase order number in the Reference field, if available.
 - Credit Card

This payment option is available in the drop-down list only when a third-party credit card processing device is connected to the tablet.
14. To submit the order tap the Submit Order button at the bottom right of the screen.

The system displays the order confirmation number, and sends a confirmation email to the email address specified in the order. Click OK to close the confirmation window.

Note: When the payment mode is by credit card, the process that follows after you submit the order is different from other payment modes.

When you tap the Submit Order button, the system transmits the sales order header information and the order totals to the third-party credit card plug-in. From this point, it is the responsibility of the third party to securely transmit the sales and credit card information to the customer's bank, and get the purchase authorized by the bank.

If the credit card processing is successful:

- The third party plug-in returns an authorization message that is processed by the Order Entry tablet application.
- The system updates the Prepayments Transaction table (F004201) with the authorization code, transaction date, and transaction amount.
- The system creates the sales order and displays a confirmation message with the sales order number.

If the credit card processing is not successful:

- The system displays an error message stating the reason. This message is transmitted by the third party plug-in.
 - The system does not create a sales order.
-
-

15. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

48.3.2 Scanning Items Into a Sales Order Using the Order Entry Mobile Tablet Application

This task outlines the specific steps required to scan items into the shopping cart using the Order Entry mobile tablet application. This task does not include instructions or information about updating the customer, checking out, or submitting the order. For additional information on entering sales orders using this application, see [Section 48.3.1, "Entering a Sales Order with the Mobile Order Entry Tablet Application: Non-Scanning Method"](#)

> **Tutorial:** [Click here to view a recording of this feature.](#)

To scan items into the shopping cart:

1. Open the application by tapping the icon on your device, and then log in. See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. Tap the Shopping Cart button at the top right of the page.
3. On the Shopping Cart screen, tap the QR Code button at the top right of the screen.
4. The Scan Item Number field appears at the bottom of the screen. Depending on your user preferences, complete one of the following steps:
 - If your preferences are set to enable Bluetooth scanning, and you have a Bluetooth-enabled scanning device connected to your mobile tablet, scan the

barcode of the item you want to add to the shopping cart. You can also manually key in the item number in the Scan Item Number field and then tab out of the field to accept the entry.

- If your preferences are set to disable Bluetooth scanning, the camera application on your device opens. Scan the bar code using the camera.
5. After you scan your item, it is added to the shopping cart. Use the Change Quantity button on the Shopping Cart screen to update the quantity information.

Search Sales Order Mobile Applications

This chapter discusses these topics:

- [Section 49.1, "Search Sales Order Mobile Applications Overview"](#)
- [Section 49.2, "Setting Up the Search Sales Order Mobile Applications"](#)
- [Section 49.3, "Using the Search Sales Order Mobile Tablet Application \(M42060\)"](#)
- [Section 49.4, "Using the Search Sales Order Mobile Smartphone Application \(M42061\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Setting Up Customer Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
 - "Entering Sales Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
 - "Processing Sales Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
-
-

49.1 Search Sales Order Mobile Applications Overview

You use the Search Sales Order mobile applications to search for and review sales order information, and add notes associated with the sales order.

The Search Sales Order mobile applications enable you to:

- Search for sales orders by using filtered criteria.
- Review sales order information including customer information, delivery instructions, sales order status, quantity ordered, unit of measure, date information, and price information.
- Review payment terms and currency information, such as foreign and base currency, and currency exchange rates when applicable.
- Review the address and location details of the delivery location, and use the device's map and navigational features to locate the delivery site.

This table lists the applications that are available to review sales order information:

Type of Application	Additional Information
Base EnterpriseOne application	To add, review, and update sales order information, use the Sales Order Entry program (P42101) in the JD Edwards EnterpriseOne system.
Tablet application	Search Sales Order (M42060) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Order Search
Smartphone application	Search Sales Order (M42061) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Order Search

Before using the Search Sales Order tablet or smartphone application, set the processing options for the Search Sales Order tablet application (M42060) and the Search Sales Order smartphone application (M42061). You set the processing options to specify whether to allow alternate language search and to specify the versions that the mobile application uses for Sale Order Entry programs (P4210) and (P42101).

49.1.1 Differences and Limitations: Search Sales Order

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Barcode Scanning (Release 9.1 Update)

The Search Sales Order tablet and smartphone applications (M42060 and M42061) are designed to scan data from a barcode and populate the item number in the Item Number field. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. These applications does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc., and does not require or recommend that you use this service to create your barcodes.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

49.2 Setting Up the Search Sales Order Mobile Applications

Before you can use the Search Sales Order mobile applications on a mobile tablet device, you: must

- Set processing options for the Search Sales Order mobile applications (M42060 and M42061).

The system administrator must set the processing options for these mobile applications before the applications are made available to end users.

See "Setting Up Processing Options for Sales Order Entry (P4210)" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

- (Release 9.1 Update) Set the Bluetooth option in your device's settings to disable Bluetooth if you want to use the native device camera to scan barcodes of item number. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device on the mobile device.

49.2.1 Setting Processing Options for the Search Sales Order Mobile Tablet Application (M42060)

You use processing options to specify default processing information for a program.

49.2.1.1 Process

1. Allow Alternate Language Search

Use this processing option to specify whether the program allows alternate language search. Values are:

Blank: Do not allow alternate language search.

1: Allow alternate language search.

When you activate this option, the system applies the functionality to the Item Number field located on the Filter pane.

49.2.1.2 Versions

1. Sales Order Entry (P42101) Version

Use this processing option to specify which version of the Sales Order Entry program (P42101) the system uses to process sales orders. The Search Sales Order tablet application processes sales orders based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

2. Sales Order Entry (P4210) Version

Use this processing option to specify which version of the Sales Order Entry program (P4210) the system uses to process sales orders. The Search Sales Order tablet application processes sales orders based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

49.2.2 Setting Processing Options for the Search Sales Order Mobile Smartphone Application (M42061)

You use processing options to specify default processing information for a program.

49.2.2.1 Process

1. Allow Alternate Language Search

Use this processing option to specify whether the program allows alternate language search. Values are:

Blank: Do not allow alternate language search.

1: Allow alternate language search.

49.2.2.2 Versions

1. Sales Order Entry (P42101) Version

Use this processing option to specify which version of the Sales Order Entry program (P42101) the system uses to process sales orders. The Search Sales Order smartphone application processes sales orders based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

2. Sales Order Entry (P4210) Version

Use this processing option to specify which version of the Sales Order Entry program (P4210) the system uses to process sales orders. The Search Sales Order smartphone application processes sales orders based on the processing options of the version that you specify. If you leave this option blank, the system uses version ZJDE0001.

49.2.3 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

The Item Number filter available in the Search Sales Order mobile applications (M42060 and M42061) enable you to filter sales order records by item. To enter data in this filter field, you have three options. You can:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note that when you enable the Bluetooth option in your device settings, the system locks the keyboard; you can use the keyboard only after you disable the Bluetooth option.

49.3 Using the Search Sales Order Mobile Tablet Application (M42060)

The Search Sales Order tablet application enables you to search for and review sales order information, and update notes associated with the sales order.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Order Search icon and log in.

49.3.1 Reviewing Sales Order Information Using a Mobile Tablet

To review sales order information on your tablet:

1. Open the application by tapping the Order Search icon on your device, and then log in.

See [Section 3.2, "Logging Into Mobile Enterprise Applications"](#)

2. To refine the list of items that appears on your screen, tap the Filter button to access the Filters pane. You can use these fields to filter sales order information:

- Sold To Customer
- Ship To Customer
- Customer PO
- Order Number
- Order Type
- Item Number

You can enter data in the Item Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Item Number field. The system launches the device camera and you can scan the barcode of the item number.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Item Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 49.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#)

- Branch Plant
- Date
- Status

3. In the Filters pane to continue the search using the specified filters, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of sales orders that are displayed in the left pane based on your filter values.

In the right pane, the system displays the sales order header information for the first sales order in the list. The default view is the information on the Header tab.

- Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the list of branch plants that stock the item with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

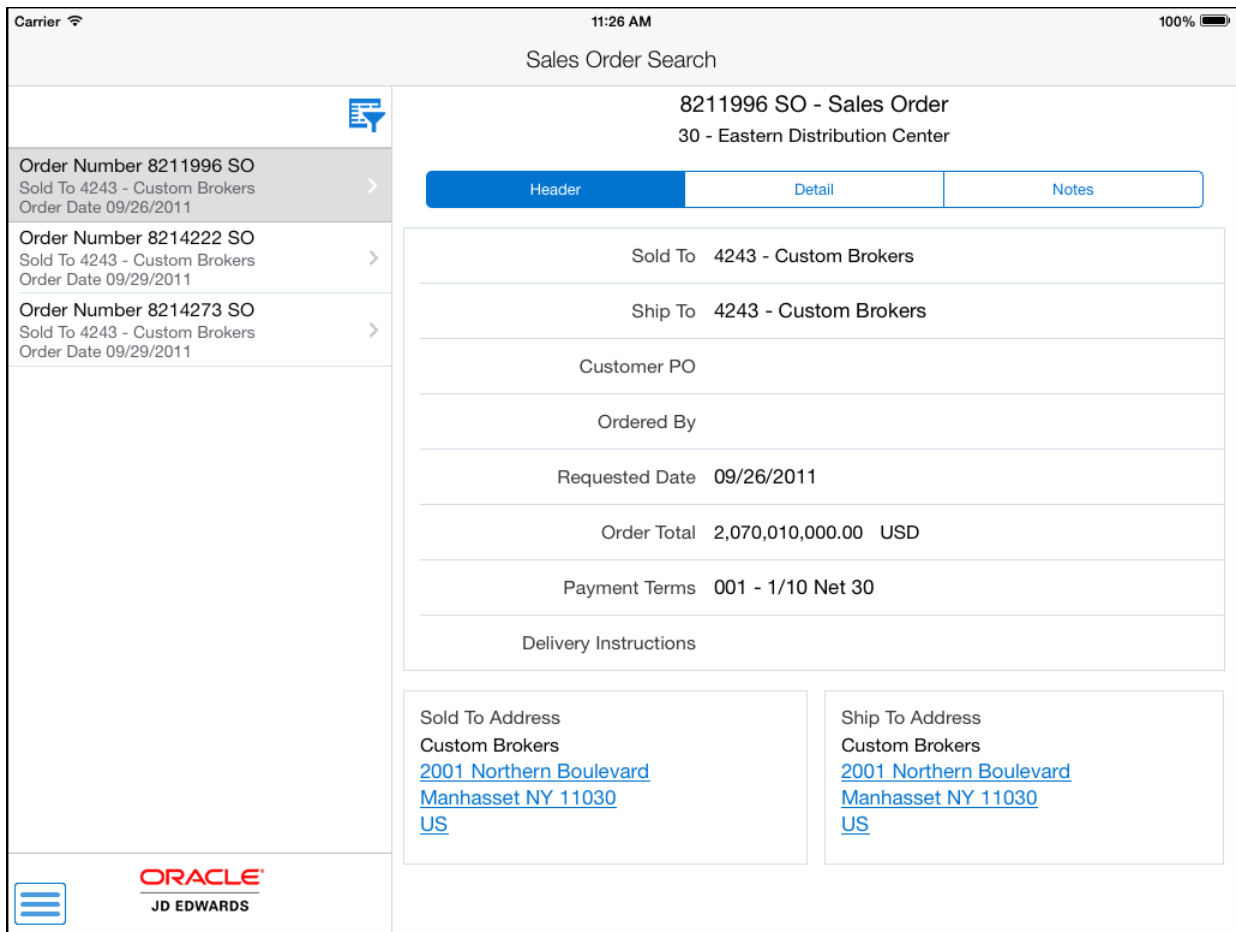
4. Review the information in the Order tab. In the Order tab the system displays the following information:

- Sold To

- Ship To
- Customer PO
- Order By (the buyer)
- Requested Date
- Order Total (total cost of the order)
- Payment Terms
- Delivery Instructions
- Sold to Address
- Ship To Address

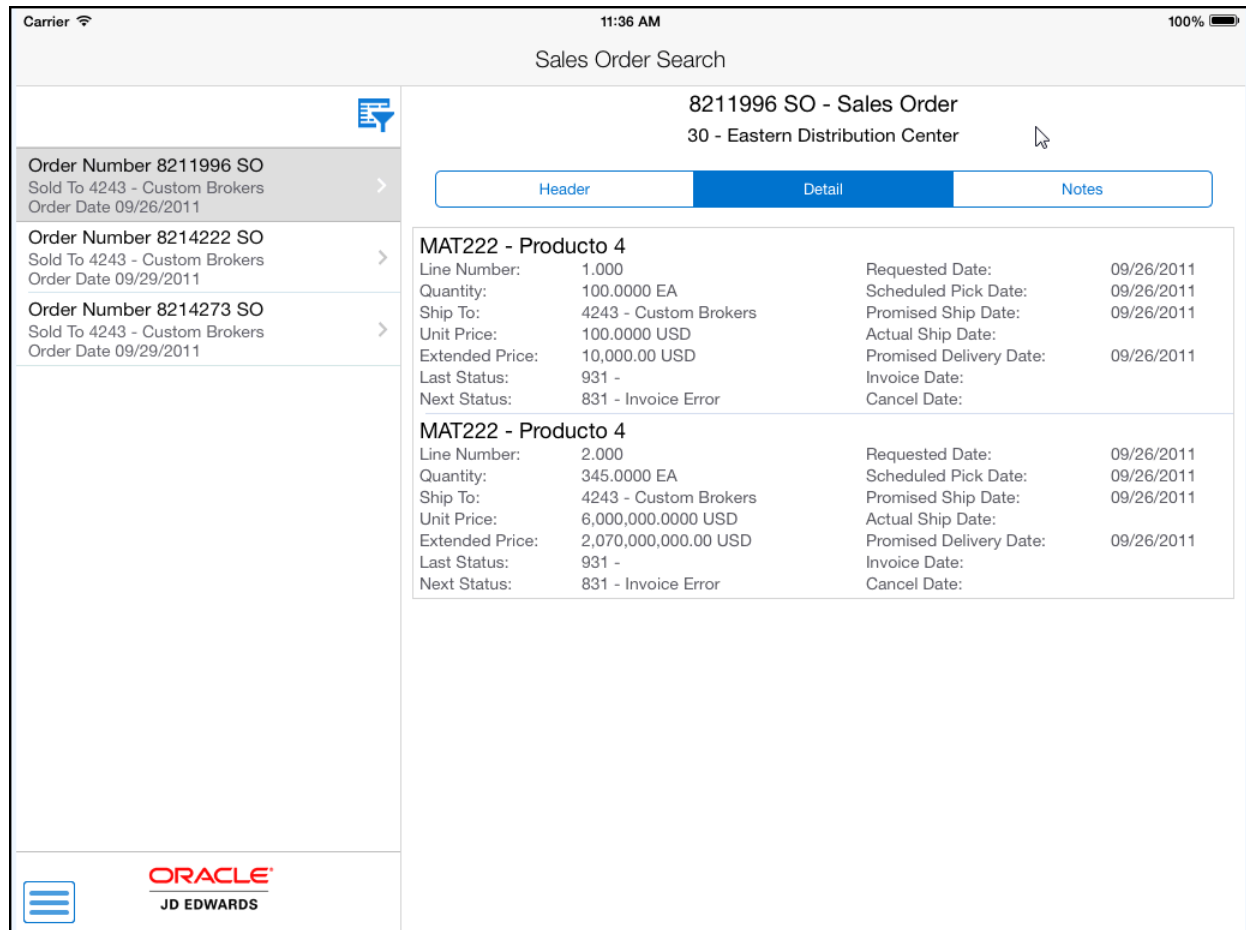
Tap the link in the Sold To Address or Ship To Address sections of the screen to use the map or navigational features of your device.

Figure 49–1 Sales Order Search - Header Tab: Tablet



5. To review sales order detail information, tap the Detail tab.

The systems displays detail information for each line number on the sales order. The detail information includes quantity, unit and extended price, last and next status, and date information.

Figure 49–2 Sales Order Search - Detail Screen: Tablet

6. To add or review notes, tap the Notes tab.
7. Tap in the New Notes section and enter notes for the sales order.
8. Tap the Save button to update the note.

When you save the note, the system appends the note to the Notes History section. However, the system does not stamp the note entry with a date. The last note in the list of notes is the most recent note.

9. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

49.4 Using the Search Sales Order Mobile Smartphone Application (M42061)

The Search Sales Order smartphone application enables you to search for and review sales order information, and update notes associated with the sales order.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Order Search icon and log in.

49.4.1 Reviewing Sales Order Information Using a Mobile Smartphone

To review sales order information on your smartphone:

1. Open the application by tapping the Order Search icon on your device, and then log in.

See [Section 3.2, "Logging Into Mobile Enterprise Applications"](#)

2. To refine the list of sales orders that appear on your screen, tap the Filter button to access the Filters screen. You use these fields to filter sales order information:

- Sold To Customer
- Ship To Customer
- Customer PO
- Order Number
- Order Type
- Item Number

You can enter data in the Item Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Item Number field. The system launches the device camera and you can scan the barcode of the item number.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Item Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 49.2.3, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#)

- Branch Plant
 - Date
 - Status
3. On the Filters screen to continue the search using the specified filters, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of sales orders that are displayed based on your filter values. Tap the Next Field button to display the Sales Order screen. The default view is the information on the Header tab.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

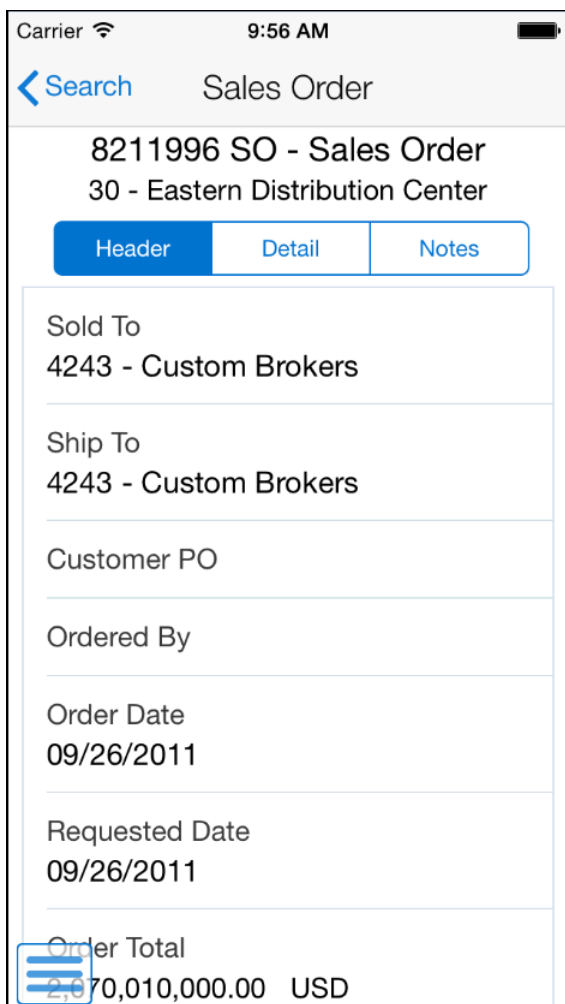
- Takes you to the list of branch plants that stock the item with the last saved filter values, if applicable.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all the filter values that you specified, and to enter new filter values, tap the Clear button.

4. Review the information in the Order tab. In the Order tab the system displays the following information:
 - Sold To
 - Ship To
 - Customer PO
 - Ordered By
 - Order Date
 - Requested Date
 - Order Total
 - Payment Terms
 - Delivery Instructions
 - Sold To Address
 - Ship To Address

Tap the link in the Sold To Address or Ship To Address sections of the screen to use the map or navigational features of your device.

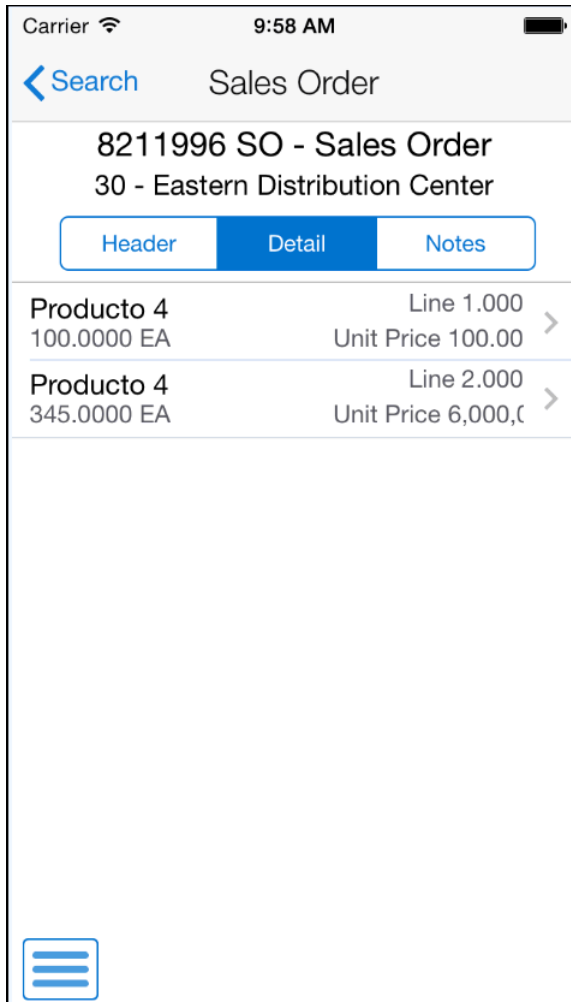
Figure 49–3 Order Screen: Smartphone



- To review the sales order detail information, tap the Detail tab.

The systems displays the item number, quantity, and unit price for each line number on the sales order.

Figure 49–4 Detail Screen: Smartphone

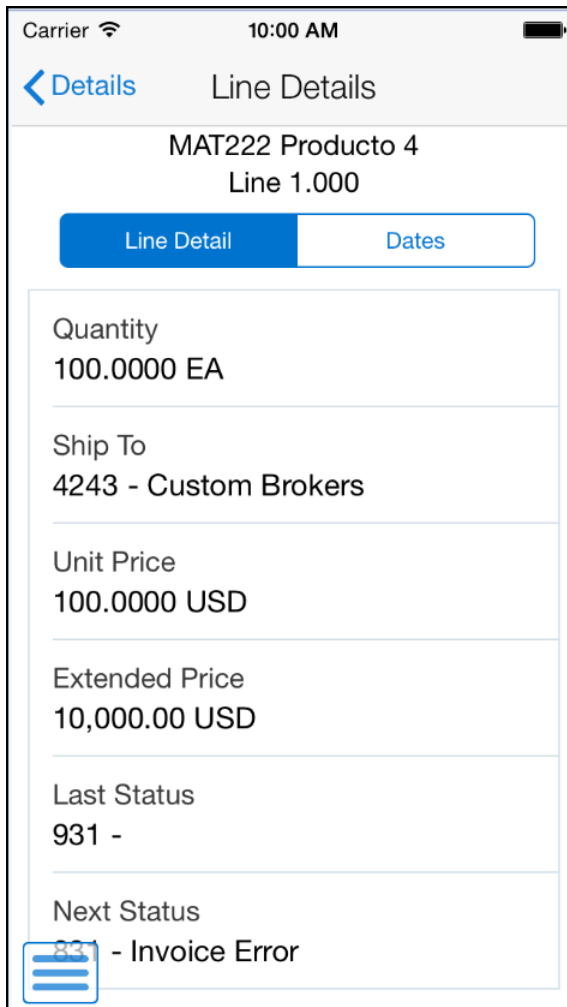


- Tap a line number to see additional sales order detail information associated with the line number.

The system displays the Line Details screen. The default view is the information on Line Detail tab.

In the Line Detail tab, the system displays:

- Quantity
- Ship To
- Unit Price
- Extended Price
- Last Status
- Next Status

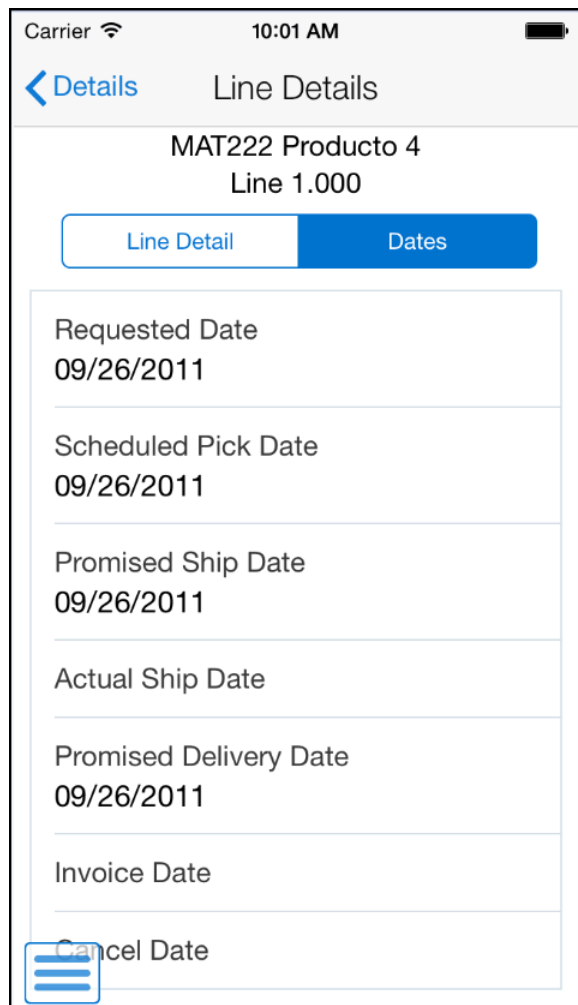
Figure 49-5 Line Details Screen: Smartphone

7. To review sales order date information, tap the Dates tab.

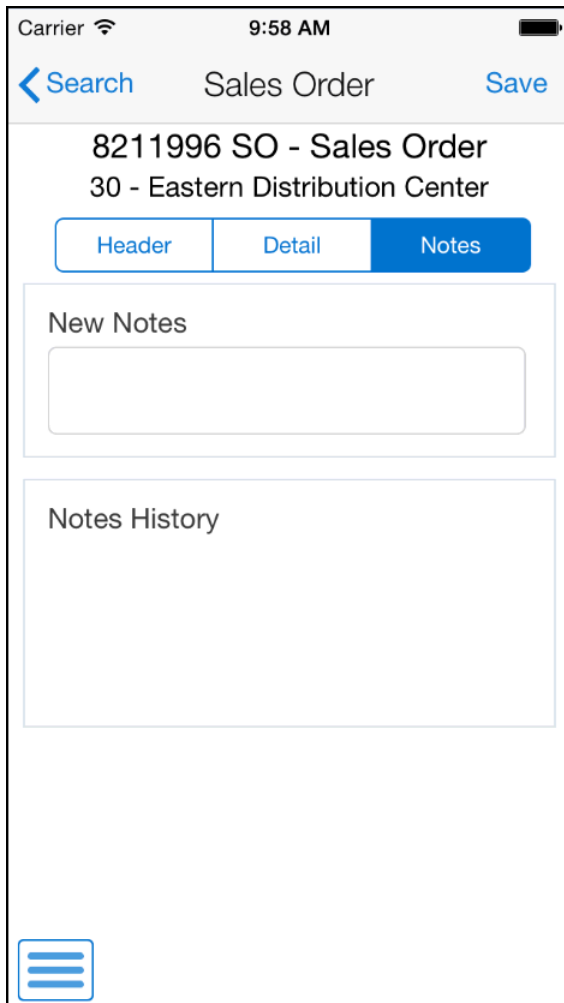
In the Dates tab, the system displays:

- Requested Date
- Scheduled Pick Date
- Promised Ship Date
- Actual Ship Date
- Promised Delivery Date
- Invoice Date
- Cancel Date

Figure 49-6 Dates Screen: Smartphone



8. Tap the Details button to return to the Sales Order screen.
9. To add or review notes, tap the Notes tab.

Figure 49–7 Notes Screen: Smartphone

10. Tap in the New Notes section and enter notes for the sales order.
11. Tap the Save button to update the note.

When you save the note, the system appends the note to the Notes History section. However, the system does not stamp the note entry with a date. The note at the bottom of the list of notes is the most recent note.

12. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Warehouse Availability Mobile Application

This chapter discusses these topics:

- [Section 50.1, "Warehouse Availability Mobile Application Overview"](#)
- [Section 50.2, "Setting Up the Warehouse Availability Mobile Application"](#)
- [Section 50.3, "Using the Warehouse Availability Mobile Tablet Application"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile application discussed in this chapter, see:

- Warehouse Availability Inquiry in the *JD Edwards EnterpriseOne Applications Warehouse Management Implementation Guide*.
 - Setting Up Warehouse Management in the *JD Edwards EnterpriseOne Applications Warehouse Management Implementation Guide*.
 - Setting Up License Plate Processing in the *JD Edwards EnterpriseOne Applications Warehouse Management Implementation Guide*.
-
-

50.1 Warehouse Availability Mobile Application Overview

You use the Warehouse Availability mobile application to review warehouse inventory balance information.

For a non-license plate warehouse, the Warehouse Availability mobile application enables you to view inventory balance information and warehouse detail information.

For a license plate warehouse, the Warehouse Availability mobile application enables you to view inventory balance information, warehouse detail information and license plate detail information.

The Warehouse Availability mobile application enables you to enter filter criteria to limit your search results based on branch/plant, item, location, lot, and parent license plate. Based on the established filter criteria, the system displays:

- Items and all locations storing those items.
- Locations and all items in those locations.

- Parent license plate and all associated child license plates.
- Warehouse inventory availability information.

Note: The Warehouse Availability mobile application does not support apparel/attribute style items. For more information on inventory availability for apparel/attribute style items, see "Reviewing Item Availability for Style Items" in the *JD Edwards EnterpriseOne Applications Apparel Management Implementation Guide*.

This table lists the applications that are available to review warehouse inventory balance information, warehouse detail information, and license plate detail information:

Type of Application	Additional Information
Base EnterpriseOne application	Use the Warehouse Availability Inquiry application (P46230) in the JD Edwards EnterpriseOne system to review inventory balance information, warehouse detail information, and license plate detail information.
Tablet application	Warehouse Availability (M46231) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Warehouse Availability

50.1.1 Barcode Scanning (Release 9.1 Update)

This application is designed to scan data for an item number, license plate number, location, and lot/serial number. To scan barcode data, you can use the native camera on your device or a third-party handheld Bluetooth-enabled scanning device. To use this functionality, you must create barcodes that represent a single field in the JD Edwards EnterpriseOne system. This application does not accept barcodes that consist of data for multiple fields.

You can generate barcodes using services such as those offered by Barcodes Inc.

Note: Oracle is not affiliated with Barcodes, Inc., and does not require or recommend that you use this service to create your barcodes.

50.2 Setting Up the Warehouse Availability Mobile Application

Before using the Warehouse Availability mobile tablet application, you

- Set processing options for the Warehouse Availability mobile tablet application (M46231).
- (Release 9.1 Update) Set the Bluetooth option in your device's settings to disable Bluetooth if you want to use the native device camera to scan barcodes of item number, license plate number, location, and lot/serial number. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device on the mobile device.

50.2.1 Setting Processing Option for the Warehouse Availability Mobile Tablet Application

You use processing options to specify default processing information for a program.

50.2.1.1 Defaults

1. Branch Plant

Use this processing option to set the default branch/plant value that the system uses.

Enter a value or use the Branch Plant search and select button to set the default branch plant the system uses to calculate and display warehouse availability.

50.2.2 Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes (Release 9.1 Update)

You can use the Item Number, License Plate Number, Location, and Lot/Serial Number fields to filter warehouse records. To enter data in these filter fields, you have three options. You can:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data. To use this option, you must disable the Bluetooth option in your device settings.
- Use a Bluetooth-enabled scanning device to scan the data. To use this option, you must:
 1. Enable the Bluetooth option in your device settings.
 2. Configure the third-party scanning device to connect to your mobile device.

Note that when you enable the Bluetooth in your device settings, the system locks the keyboard and you can use the keyboard only after you disable the Bluetooth option.

50.3 Using the Warehouse Availability Mobile Tablet Application

The Warehouse Availability mobile tablet application enables you to review inventory balance information, warehouse detail information, and license plate detail information.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the WMS AVAIL icon and log in.

50.3.1 Reviewing Warehouse Inventory Information for a Non-License Plate Warehouse

To inquire on warehouse inventory information for a non-license plate warehouse:

1. Open the application by tapping the WMS AVAIL icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. Enter a value in the Item Description field, and tap the Search button.
3. To filter records, tap the filter icon.

To filter records for a non-license plate warehouse, enter a non-license plate warehouse in the Branch/Plant field. Then, enter data in the Item Number field using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Item Number field. The system launches the device camera and you can scan the barcode of the item number.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Item Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 50.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#)

Note: You can filter records either for a license plate warehouse or a non-license plate warehouse at a time.

You use the Item Number field to filter records for a non-license plate warehouse.

You use the License Plate Search option and License Plate Number field to filter records for a license plate warehouse. The system hides the Item Number field if you have selected the License Plate Search option.

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of items that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system takes you to the list of items associated with the last saved filter values, if applicable.

To delete all of the filter values that you specified, and to enter new filter values, tap the Clear button.

5. The system displays warehouse inventory information in three tabs: Basic, Commit, and Lot Details.

Figure 50–1 Warehouse Availability: Basic tab

Warehouse Availability

NLWH2 - Tire Pump
27 - Eastern Area DC

Enter Item Description

Tire Pump
Item: NLWH2
27 - Eastern Area DC

Basic		Commit	Lot Details	
Location	Lot	Available	On Hand	Primary UOM
..		1071.0000	1100.0000	EA
1.A.1	LOT973	1500.0000	1462.0000	EA
1.A.2	LOT974	1071.0000	1100.0000	EA
1.A.3	LOT975	1462.0000	1500.0000	EA
1.A.4	LOT975	15.0000-	1500.0000	EA
1.A.5	LOT976	0.0000	0.0000	EA
1.B.	LOT977	1.0000-	0.0000	EA
1.B.	LOT978	0.0000	0.0000	EA
2.A.				EA
2.A.	NL121	52.0000-	98.0000	EA
D..	LOT975	0.0000	0.0000	EA
D..	NL121	0.0000	2.0000	EA

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Availability Details

Note: To filter records based on location and lot/serial number, tap the filter icon on the top right of the screen. On the filters screen, complete the Location and Lot/Serial number fields using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Location and the Lot/Serial number field. The system launches the device camera and you can scan the barcode of the location and the lot/serial number.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Location and the Lot/Serial number field to activate the scanning device. Then, scan the barcode of the location and lot/serial number using the scanning device.

Select the Omit Zero Quantities option to omit any zero quantities from the filtered records.

See [Section 50.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#)

The system displays location, lot, available quantity, on hand quantity and primary unit of measure values on the Basic tab.

The system displays location, lot, backordered quantity, committed quantity and soft committed quantity on the Commit tab.

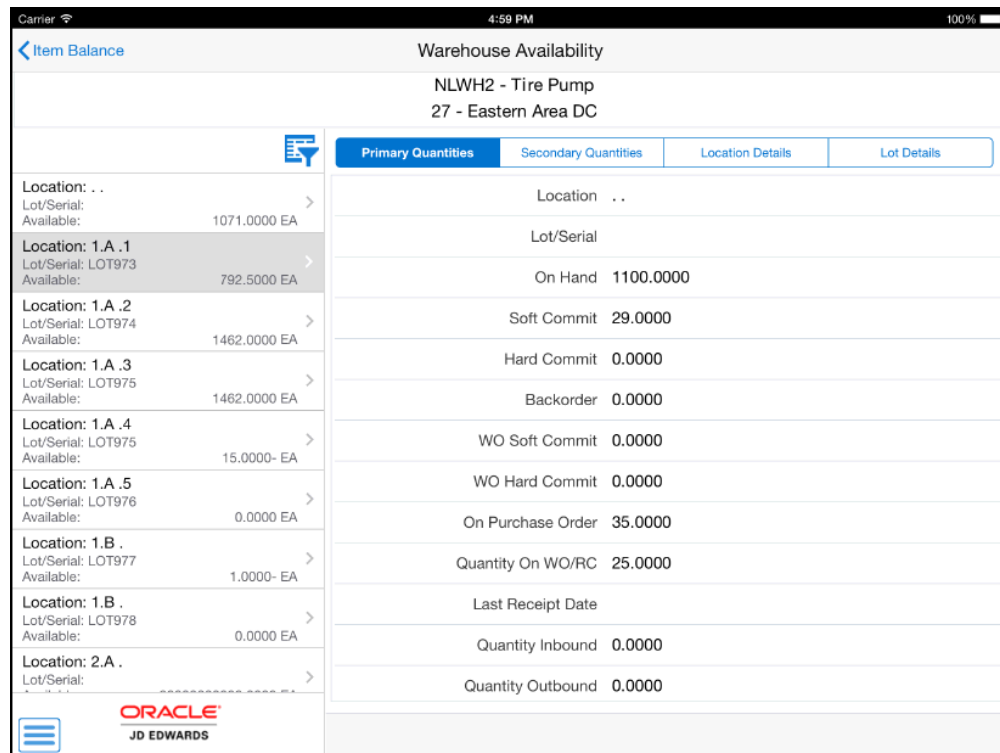
You review lot information including lot status, lot grade and lot potency on the Lot Details tab.

6. Tap the Availability Details button in the bottom right of the screen.

The system displays item availability information on the Availability Details screen. The column on the left displays the list of location and lot combinations.

Tap a record in the left column to view availability information for the respective location. The system displays availability information in four tabs: Primary Quantities, Secondary Quantities, Location Details and Lot Details.

Figure 50–2 Warehouse Availability: Availability Details



You review warehouse availability information including location, lot/serial number, and on hand quantity under the Primary Quantities tab.

7. To view warehouse location details, tap the Location Details tab.
8. Tap the Warehouse Location Details button. The system displays a list of locations in the left column.

Tap a Location Detail Sequence to review location details.

The system displays warehouse location details in two tabs: Location Details and Quantity Levels.

Figure 50–3 Warehouse Availability: Location Details

The screenshot shows the 'Warehouse Availability' screen for 'NLWH2 - Tire Pump' at '27 - Eastern Area DC'. The 'Location Details' tab is selected, showing the following information:

Field	Value
Location	..
Lot/Serial	
Location Detail Sequence	1
Primary Quantity	1000.0000 EA
Dual Quantity	0.0000
Commit	0.0000
Quantity Inbound	0.0000
Quantity Outbound	0.0000
Receipt Date	4/9/14
Used Cubic Dimension	1,157.40 FC
Reserved Cubic Dimension	0.00 FC
Used Weight	200.00 LB
Reserved Weight	0.00 LB

The Oracle JD Edwards logo is visible at the bottom left of the screen.

The system displays location information including location, lot/serial number, location detail sequence, primary quantity, secondary quantity, committed, inbound and outbound quantity on the Location Details tab.

The system displays quantity details for different level containers on the Quantity Details tab.

9. To go back to view warehouse availability details, tap the Availability Details button in the top left on the screen.
10. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

50.3.2 Reviewing Warehouse Inventory Information for a License Plate Enabled Branch/Plant

To inquire on warehouse inventory information for a license plate enabled branch/plant:

1. Open the application by tapping the icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. Enter a value in the Item Description field and tap the Search icon.
3. To filter records, tap the filter icon.

To filter records for a license plate enabled warehouse, enter a license plate warehouse in the Branch/Plant field, and then select the License Plate Search option on the filters screen.

In the License Plate Number field, enter data using one of these options:

- Use the keyboard on your mobile device to manually enter the data.

- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the License Plate Number field. The system launches the device camera and you can scan the barcode of the work order.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the License Plate Number field to activate the scanning device. Then, scan the barcode of the license plate number using the scanning device.

See [Section 50.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#)

Note: The system displays the License Plate Number field only when you select the License Plate Search option.

The system hides the Item Number field if you have selected the License Plate Search option.

4. In the Filters pane, to continue the search using the specified filter values, tap the Apply button. When you tap the Apply button, the system:
 - Takes you to the list of items that are displayed based on your filter values.
 - Saves the filter values that you entered. The system displays the saved filter values the next time you open the filter screen.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system takes you to the list of items associated with the last saved filter values, if applicable.

To delete all filter values you specified, and to enter new filter values, tap the Clear button.

5. The system displays inventory information in three tabs: Basic, Commit and Lot Details.

Figure 50–4 Warehouse Availability: Basic tab

Warehouse Availability				
NLLPN22 - Multivitamin Tablets W70 - LP Warehouse				
Basic		Commit	Lot Details	
Location	Lot	Available	On Hand	Primary UOM
...		98.0000	100.0000	EA
1.A.1.		1000.0000	1000.0000	EA
1.A.1.	NL21	100.0000	100.0000	EA
1.A.2.	NL22	10.0000	10.0000	EA
1.C.1.		1000.0000	1000.0000	EA
1.F.1.		2000.0000	2000.0000	EA
1.G.1.		2093.0000	2100.0000	EA
1.G.1.	LOT9737	110.0000	110.0000	EA
1.H.1.		1000.0000	1000.0000	EA
1.H.1.	LOT9739	0.0000	3810.0000	EA
D. . .		0.0000	0.0000	EA
D. . .	LOT9738	0.0000	0.0000	EA

Note: To filter records based on location and lot/serial number, tap the filter icon on the top right of the screen. On the filters screen, complete the Location and Lot/Serial number fields using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Location or the Lot/Serial number field. The system launches the device camera and you can scan the barcode of the location or lot/serial number.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Location or the Lot/Serial number field to activate the scanning device. Then, scan the barcode of the location or lot/serial number using the scanning device.

See [Section 50.2.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes \(Release 9.1 Update\)"](#)

The system displays location, lot, available quantity, on hand quantity, and primary unit of measure values on the Basic tab.

The system displays location, lot, backordered quantity, committed quantity, and soft committed quantity on the Commit tab.

You review lot information including lot status, lot grade and lot potency on the Lot Details tab.

6. Tap the Availability Details button in the bottom right of the screen.

The system displays item availability information on the Availability Details screen. The column on the left displays the list of location and lot combinations.

Tap a record in the left column to view availability information. The system displays availability information in four tabs: Primary Quantities, Secondary Quantities, Lot/LP Details and LP Structure.

Figure 50–5 Warehouse Availability: Availability Details

Warehouse Availability	
NOKIA - NOKIA Warehouse Item 40 - Southern Distribution Center	
Location: . . .	Primary Quantities
Lot/Serial: >	Secondary Quantities
Available: 0.0000 EA	Location Details
Location: 2.A.1	Lot Details
Lot/Serial: >	Location 2.A.1
Available: 100.0000 EA	Lot/Serial
	On Hand 100.0000
	Soft Commit 0.0000
	Hard Commit 0.0000
	Backorder 0.0000
	WO Soft Commit 0.0000
	WO Hard Commit 0.0000
	On Purchase Order 0.0000
	Quantity On WO/RC 0.0000
	Last Receipt Date
	Quantity Inbound 0.0000
	Quantity Outbound 0.0000

You review warehouse availability information including location, lot/serial number, on-hand quantity, soft committed quantity, and last receipt date under the Primary Quantities tab.

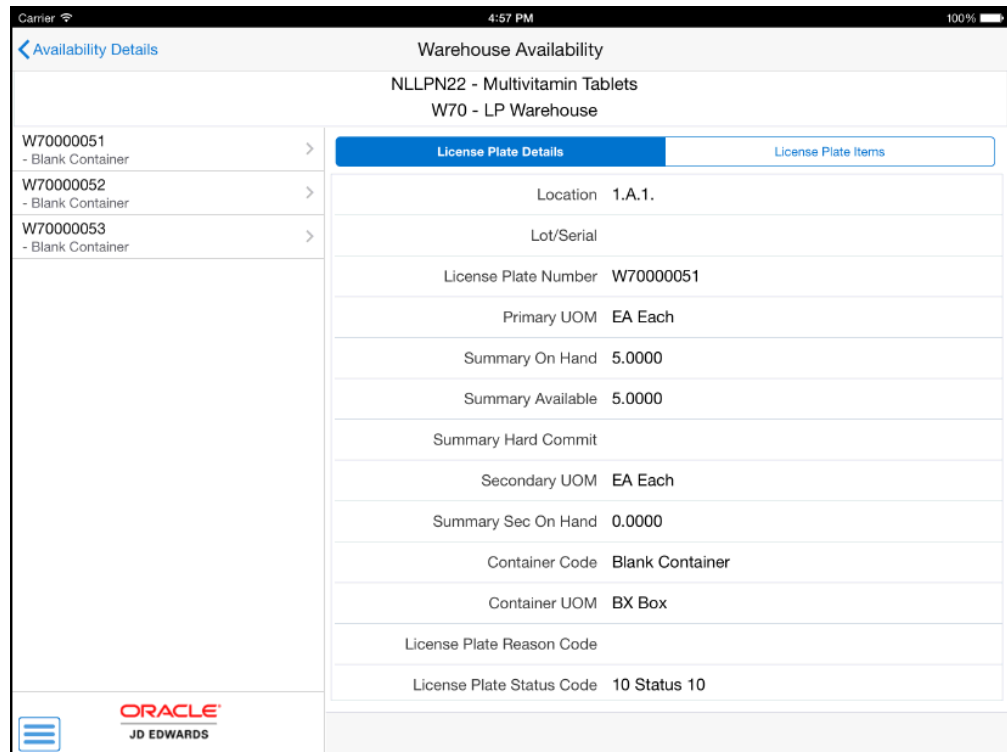
The system displays warehouse availability information including location, lot/serial number, secondary unit of measure, secondary on-hand quantity, last receipt date, inbound quantity, and outbound quantity under the Secondary Quantities tab.

The system displays lot and license plate details including location, lot/serial number, lot status code, lot potency, country of origin and license plate quantity on the Lot/LP Details tab.

To review license plate structure details including license plate numbers, tap the LP Structure tab.

The system displays license plate structure details including license plate numbers, location, and summary of on hand and available quantities.

7. To review license plate details, tap the License Plate Details button.

Figure 50–6 Warehouse Availability: License Plate Details

8. The system displays the license plates associated with the selected record in the list on the left. You review license plate details in two tabs: License Plate Details and License Plate Items.
9. Tap a license plate in the list on the left.
The system displays license plate details including parent license plate number, location, lot/serial number, license plate number, primary unit of measure, license plate reason code and license plate status code on the License Plate Details tab.
10. To view license plate item details, tap the License Plate Items tab. The system displays all child license plates associated with the selected parent license plate.
To go back to availability details, tap the Availability Details button in the top left on the screen.
11. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Inventory Transfer Mobile Application (Release 9.1 update)

This chapter discusses these topics:

- [Section 51.1, "Inventory Transfer Mobile Application Overview"](#)
- [Section 51.2, "Setting Up the Inventory Transfer Mobile Application"](#)
- [Section 51.3, "Using the Inventory Transfer Mobile Tablet Application"](#)

Important Note: Before using the mobile application, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile application discussed in this chapter, see:

- *"Working with Inventory Transfers" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide.*
-
-

51.1 Inventory Transfer Mobile Application Overview

The Inventory Transfer mobile application enables you to transfer inventory from one location to another using barcode scanning or manual entry. The Inventory Transfer information includes item number, lot/serial number, location, unit of measure, transaction date, and quantity information.

You can use Inventory Transfer mobile application for two types of inventory movement:

- Movement between different locations in the same branch/plant.
- Movement between different branch/plants.

An inventory transfer creates two journal entries in the Item Ledger. The first journal entry decreases inventory at the original location. The second entry increases inventory at the destination location.

This table lists the applications that are available to review inventory transfer information:

Type of Application	Additional Information
Base EnterpriseOne application	Use the Inventory Transfers application (P4113) in the JD Edwards EnterpriseOne system to review inventory transfer information.
Tablet application	Inventory Transfer (M41242) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Inventory Transfer

Before using the Inventory Transfer tablet application, you must perform the following setup tasks:

- Set the processing options of the application.
Complete this task in the EnterpriseOne system.

51.1.1 Differences and Limitations: Inventory Transfer

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Inventory Transfer Information Displayed

While the Inventory Transfer mobile application does not function differently than base EnterpriseOne applications, it does offer the mobile user a subset of transfer information. Not all transfer information available in the base software is available in the mobile application.

51.2 Setting Up the Inventory Transfer Mobile Application

Before using the Inventory Transfer mobile application, you:

- Set processing options for the Inventory Transfer tablet application (M41242).
Setting processing options for the application is a task that should be completed by the system administrator before the mobile application are made available to end users.
- Disable the Bluetooth option in your device’s settings if you want to use the native device camera to scan barcodes of item number, location, and lot/serial number. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device on the mobile device.

51.2.1 Setting Processing Options for the Inventory Transfer Tablet Application (M41242)

You use processing options to specify default processing information for a program.

51.2.1.1 Versions

Inventory Transfer (P4113) Version

Use this processing option to specify the version of the Inventory Transfer program (P4113) the system uses to run the Inventory Transfer mobile tablet application (M41242). If you leave this processing option blank, the system uses version ZJDE0001.

51.2.1.2 Default

Override Default Branch Plant

Use this processing option to set the default from branch plant value as defined in the Default Location & Printers program (P400951) in EnterpriseOne application.

Blank: Display the default from branch plant value as specified in the Default Location & Printers program (P400951) in EnterpriseOne application. Do not allow user to override the default from branch plant value.

1: Allows user to override the default from branch plant value as specified in the Default Location & Printers program (P400951) in EnterpriseOne application.

Note: This processing option is only applicable for the From Branch Plant field in the mobile tablet application.

51.2.1.3 Display

Use this processing option to set the display of Quantity and Unit of Measure.

Blank: Display the primary quantity and unit of measure.

1: Display the secondary quantity and unit of measure along with the primary quantity and unit of measure.

51.3 Using the Inventory Transfer Mobile Tablet Application

The Inventory Transfer mobile application enables you to transfer inventory from one location to another using barcode scanning or manual entry, within a branch plant or between branch plants. As part of one inventory transfer, you can transfer a bunch of inventory from one location to another. The inventory transfer information includes item number, lot/serial number, location, unit of measure, transaction date, and quantity information.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Inv Transfer icon and log in.

51.3.1 Using the Inventory Transfer Mobile Tablet Application (M41242)

To transfer inventory:

1. Open the application by tapping the Inv Transfer icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

The Inventory Transfer Entry form opens, and it has three major sections.

- Header
 - Details
 - Recent Inventory Transfers
2. Provide the required information in the Header section.

Header

The header section displays inventory transfer information such as location, transaction date, and description. You can save the information in the header section for multiple inventory transfer records. The header information is common for all the items/records transferred as part of a single inventory transfer document.

Transaction Description

Enter a brief description about the transaction. By default, the field displays the default document type description.

From / To Branch Plant

Add the branch plant information from where you want to transfer and the branch plant to which you want to transfer your inventory. You can manually enter the data or you can use the Search icon to search and select the branch plant.

Note: You can set the default from branch plant value in the Default processing option. See [Section 51.2.1, "Setting Processing Options for the Inventory Transfer Tablet Application \(M41242\)."](#)

From Location

Enter the From Location using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the From Location field. The system launches the device camera and you can scan the barcode of the location.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the From Location field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

To Location

Enter the To Location using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the To Location field. The system launches the device camera and you can scan the barcode of the location.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the To Location field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Note: You can also provide the To Location data after entering the information in the Details section.

Transaction Date

By default, the application displays the current transaction date.

3. Tap the Save Header button to save the header information and to use it for multiple inventory transfer records.
4. To edit the header information, tap on Edit Header button. Update the header information and tap Save Header button to save the data changes.

You can also edit header information after entering the Details data. The Details section disables when you edit the header information.

Figure 51–1 Edit Header Information

5. Provide the required information in the Details section.

Details

The details section displays inventory transfer information such as item number, lot/serial number, unit of measure, and quantity information. You can list and save multiple inventory records with different information in the details section under the same header information.

Item Number

Enter Item Number using one of these options:

- Use the keyboard on your mobile device to manually enter the data.

- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Item Number field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Item Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.
See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Quantity

Enter the quantity of the item you want to transfer. When you scan an item, by default, the quantity is displayed as 1.

Unit of Measure

Enter the unit of measure for the quantity of item.

Note: You can add both Primary and Secondary Quantity and Unit of Measure if you have set the Display processing option as 1. See [Section 51.2.1, "Setting Processing Options for the Inventory Transfer Tablet Application \(M41242\)."](#)

Lot/Serial

Enter the Lot/Serial using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Lot/Serial field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Lot/Serial field to activate the scanning device. Then, scan the barcode of the item using the scanning device.
See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Note: You can tap the Clear Details button to discard the inventory transfer information in the details section.

6. Tap the Add to List button to add the inventory transfer record in the Inventory Transfer List. You can add multiple inventory transfer records with the same header information in the Inventory Transfer List.
7. You can perform the following actions to the inventory transfer records in the Inventory Transfer List:

- **Save** - Tap the Save icon on the top of the Inventory Transfer List. A confirmation message appears; tap Yes to save the list of inventory transfer records.
- **Cancel** - Tap the Cancel icon on the top of the Inventory Transfer List to clear all inventory transfer records in the list.
- **Edit** - You can edit any particular inventory transfer record in the Inventory Transfer List. Tap to select the record in the list. The information for the selected record is displayed in the Details section. You can edit any information in the Details section.
- **Delete** - You can delete any particular inventory transfer record in the Inventory Transfer List. Tap to select the record in the list and swipe left. A confirmation message appears; tap Yes to delete the selected record.

Figure 51–2 Inventory Transfer Entry Screen - Tablet

8. Tap the Recent Inventory Transfers button in the top left of the screen to view the recent inventory transactions.

Recent Inventory Transfers

Displays a list of recent inventory transfers for the last 14 days by default. You can set the date range in the filter and search the records. To set the date range, you:

- Tap the Filter icon on the top right.
- Enter From and To Transaction Date information.
- Tap the Apply button to apply the filter and search the records.

Each record displays information such as item number, from and to branch plants, from and to location, quantity, unit of measure, and lot number.

Figure 51–3 Recent Inventory Transfer Screen

Inventory Transfer Entry		Recent Inventory Transfers	
Item REM_LPN - Remya License Plate Item	Quantity - 10.0000-	09/19/2017	
From Branch Plant - SATWH - Satya warehouse branchplant	From Location - . .		
To Branch Plant - SATWH - Satya warehouse branchplant	To Location - A.X.1		
Lot -	Primary UOM - Case	Secondary UOM - balnk	
Inventory Transfers	Document - 178	Secondary Quantity - 0.0000	
Item REM_LPN - Remya License Plate Item	Quantity - 1.0000-	09/18/2017	
From Branch Plant - SATWH - Satya warehouse branchplant	From Location - . .		
To Branch Plant - SATWH - Satya warehouse branchplant	To Location - . .		
Lot -	Primary UOM - Each	Secondary UOM - balnk	
Inventory Transfers	Document - 177	Secondary Quantity - 0.0000	
Item WW01 - Warehouse Widget 1	Quantity - .1000-	09/17/2017	
From Branch Plant - 130 - License Plate Warehouse 130	From Location - . .		
To Branch Plant - 130 - License Plate Warehouse 130	To Location - . .		
Lot -	Primary UOM - Each	Secondary UOM - balnk	
Inventory Transfers	Document - 7	Secondary Quantity - 0.0000	
Item WW01 - Warehouse Widget 1	Quantity - .1000-	09/18/2017	
From Branch Plant - 130 - License Plate Warehouse 130	From Location - . .		
To Branch Plant - 130 - License Plate Warehouse 130	To Location - . .		
Lot -	Primary UOM - Each	Secondary UOM - balnk	
Inventory Transfers	Document - 6	Secondary Quantity - 0.0000	
Item LAKSHMI - dual UOM	Quantity - 1.0000-	09/18/2017	
From Branch Plant - M30 - Eastern Manufacturing Centeras	From Location - . .		
To Branch Plant - M30 - Eastern Manufacturing Centeras	To Location - 1 .B .1		



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- To define filter criteria, tap the Filter button in the top right of the screen.

You can filter records based on item number, location, lot number, branch plant, and a range of transaction dates.

To filter by item number, location, and lot number, you populate data in the Item Number, Location, and Lot Number fields using one of these three options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Item Number, Location, and Lot Number field. The system launches the device camera and you can scan the barcode of the item number, location, and lot number.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Item Number, Location, and Lot Number field to activate the scanning device. Then, scan the barcode of the location and lot/serial number using the scanning device.

Tap the Apply button to apply your filter and search.

You can tap Clear button to clear the filter data and tap Cancel button to close the filter.

Cycle Count Mobile Application (Release 9.1 update)

This chapter discusses these topics:

- [Section 52.1, "Cycle Count Mobile Application Overview"](#)
- [Section 52.2, "Setting Up the Cycle Count Mobile Application"](#)
- [Section 52.3, "Using the Cycle Count Mobile Tablet Application \(M41240\)"](#)

Important Note: Before using the mobile application, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile application discussed in this chapter, see:

- *"Inventory Cycle Counts" in the JD Edwards EnterpriseOne Applications Business Interfaces Implementation Guide.*
-

52.1 Cycle Count Mobile Application Overview

The Cycle Count mobile application enables you to count the inventory at the inventory location. The application allows you to perform scheduled cycle count and unscheduled cycle count.

You use the Cycle Count mobile application to:

- Achieve higher inventory accuracy
- Reduce hours of operation
- Increase operational efficiency

This table lists the applications that are available to review cycle count information:

Type of Application	Additional Information
Base EnterpriseOne application	Use the Cycle Count application (P41240) in the JD Edwards EnterpriseOne system to review cycle count information.
Tablet application	Cycle Count (M41240) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Cycle Count

Before using the Cycle Count tablet application, you must perform the following setup tasks:

- Set the processing options of the application.
Complete this task in the EnterpriseOne system.

52.1.1 Differences and Limitations: Cycle Count

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Cycle Count Information Displayed

While the Cycle Count mobile application does not function differently than base EnterpriseOne applications, it does offer the mobile user a subset of cycle count information. Not all cycle count information available in the base software is available in the mobile application.

52.2 Setting Up the Cycle Count Mobile Application

Before using the Cycle Count mobile application, you:

- Set processing options for the Cycle Count tablet application (M41240).
Setting processing options for the application is a task that should be completed by the system administrator before the mobile application are made available to end users.
- Disable the Bluetooth option in your device's settings if you want to use the native device camera to scan barcodes of item number, location, and lot/serial number. Enable the Bluetooth option if you want to use a Bluetooth-enabled scanning device to scan the barcodes. To scan barcodes using a Bluetooth scanning device, you must configure the scanning device on the mobile device.

52.2.1 Setting Processing Options for the Cycle Count Tablet Application (M41240)

You use processing options to specify default processing information for a program.

52.2.1.1 Versions

1. Cycle Count (P41240) Version

Use this processing option to specify the version of the Cycle Count program (P41240) the system uses to run the Cycle Count mobile tablet application (M41240). If you leave this processing option blank, the system uses version ZJDE0001.

52.2.1.2 Display

Use this processing option to set the display.

1. Approve Button

Specify if you want to allow user to approve the cycle count.

Blank: Disables and does not display the Approve button.

1: Enables and displays the Approve button.

2. Show/Hide Secondary QTY/UOM

Specify if you want to display the secondary quantity and unit of measure.

Blank: Display only the primary quantity and unit of measure.

1: Display the secondary quantity and unit of measure along with the primary quantity and unit of measure.

52.3 Using the Cycle Count Mobile Tablet Application (M41240)

The Cycle Count tablet application enables you to:

- Search and review existing cycle count.
- Update existing cycle count.
- Add new items in the cycle count.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the Cycle Count icon and log in.

52.3.1 Reviewing and Updating Cycle Count Using Mobile Tablet Application

To review and update cycle count on your tablet:

1. Open the application by tapping the Cycle Count icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. The Cycle Count Review screen is displayed. By default, the left side of the screen displays a list of recent cycle counts that were entered during the last 14 days. You can set the date range in the filter and search the records. To set the date range, you:
 - Tap the Filter icon on the top left.
 - Enter From and To Cycle Count Date information.
 - Tap the Apply button to apply the filter and search the records.

Each cycle count record displays information such as cycle count number, date, cycle count status, location to count, and items to count.

3. You can enter any cycle count number in the Cycle Count Number field and tap the Search icon on the top left to search the specific cycle count.

Tap the Filter icon on the top left to filter and search your list of cycle count. Enter the details of Cycle Count Status or Cycle Count Date or both status and date, and tap the Apply button to apply your filter.

4. Select any record from the cycle count list on the left side to review the items to count. The list of items to count for the selected cycle count is displayed on the right side.

Note: By default, each cycle count can display a list of maximum 100 records. It is recommended to have not more than 100 records in a single cycle count.

5. You can filter the list of items by item number and location. Tap the Filter icon on the top right and enter the following details:

Item Number

Enter the Item Number using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the Item Number field. The system launches the device camera and you can scan the barcode of the equipment.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the Item Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Location

Enter the Location using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.

To use this option, tap the QR Code button next to the To Location field. The system launches the device camera and you can scan the barcode of the location.

- Use a Bluetooth-enabled scanning device to scan the data.

To use this option, tap the To Location field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Tap the Apply button to apply your filter and search the items.

Figure 52–1 Cycle Count Review Screen

Cycle Count Review		Approve
279 - Jon - Unexpected Shortage		
279 - Jon - Unexpected Shortage 05/08/2017 Locations to count: 8 Items to count: 2	Item: 1001-Bike Rack - Trunk Mount Lot: Counted: 23.0000	Location: . . On Hand: 7,920.9890 Variance : 7897.9890
280 - Jon - Unexpected Shortage 05/08/2017 Locations to count: 4 Items to count: 2	Item: 1001-Bike Rack - Trunk Mount Lot: Counted: 2.0000	Location: 01.A .01 On Hand: 99,999.9990 Variance : 9999999990
	Item: 1001-Bike Rack - Trunk Mount Lot: Counted: 55.0000	Location: 02.A .02 On Hand: .0000 Variance : 55.0000
	Item: 1001-Bike Rack - Trunk Mount Lot: Counted: 44.0000	Location: 03.A .03 On Hand: .0000 Variance : 44.0000
	Item: 1001-Bike Rack - Trunk Mount Lot: Counted: 10.0000	Location: 1 .A .1 On Hand: .0000 Variance : 10.0000
	Item: 1001-Bike Rack - Trunk Mount Lot: Counted: 74.0000	Location: 1 .A .2 On Hand: .0000 Variance : 74.0000
	Item: 1002-Bike Rack - Trunk Mount New Lot: Counted: 13.0000	Location: 1 .A .1 On Hand: .0000 Variance : 13.0000
	Item: 1003-Bike Rack - Trunk Mount OLD Lot: Counted: 13.0000	Location: 1 .B .1

6. You can view the following information in each record in the item list:
 - Item number
 - Lot number
 - Counted item
 - Location
 - On Hand item count
 - Variance of item
7. You can approve the list of items for a cycle count. Tap the Approve button on the top right of the screen to approve the items.

Note: The Approve button, On Hand item count, and Variance of item information are displayed if you have set the Display processing option. See [Section 52.2.1, "Setting Processing Options for the Cycle Count Tablet Application \(M41240\)."](#)

8. Tap to select any item from the item list to review or update the quantity of the selected item.
9. The Cycle Count Entry screen is displayed. You can update the Quantity and Unit of Measure of the item. You can add new quantity and can also add new unit of measure for the item.

Figure 52–2 Cycle Count Entry Screen: Update Item

The screenshot shows the 'Cycle Count Entry' screen for updating an item. The title is 'Bike Rack - Trunk Mount' with a 'Cycle Count Number: 283'. The screen contains several input fields:

- Branch Plant: 30
- Item: 1001
- Location: 1.A.1
- Lot Number: (empty)
- Quantity: 5.0000
- Unit of Measure: EA (with a search icon)
- Secondary Quantity: 0.0000
- Secondary UOM: EA (with a search icon)

At the top left is a 'Cancel' button and at the top right is a 'Save' button. A menu icon is visible at the bottom left.

10. After you complete entering the Quantity and the Unit of Measure, tap the Save button on the top right of the screen to save the data.

You can tap the Cancel button on the top left of the screen to cancel the data.

52.3.2 Entering New Item Using Cycle Count Mobile Tablet Application

To enter a new item in a cycle count on your tablet:

1. Open the application by tapping the Cycle Count icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. The Cycle Count Review screen is displayed. By default, the left side of the screen displays a list of recent cycle counts that were entered during the last 14 days. You can set the date range in the filter and search the records. To set the date range, you:
 - Tap the Filter icon on the top left.
 - Enter From and To Cycle Count Date information.
 - Tap the Apply button to apply the filter and search the records.
3. Select a record from the cycle count list on the left and tap the Add icon on the top right to enter a new item for the selected cycle count.

Figure 52–3 Cycle Count Entry Screen: Add Item

The screenshot shows the 'Cycle Count Entry' screen with the following fields and values:

- Branch Plant: 30
- Item: [Empty field with QR code and search icons]
- Location: [Empty field with QR code and search icons]
- Lot Number: [Empty field with QR code icon]
- Quantity: [Empty field]
- Unit of Measure: [Empty field with search icon]
- Secondary Quantity: [Empty field]
- Secondary UOM: [Empty field with search icon]

At the top, there are 'Cancel' and 'Save' buttons. The title is 'Bike Rack - Trunk Mount New' with 'Cycle Count Number: 283' below it. A menu icon is visible at the bottom left.

- The Cycle Count Entry screen is displayed. Enter the following details.

Branch Plant

Add the branch plant information.

Note: If the branch plant is set in the Default Location & Printers program (P400951) in EnterpriseOne application, then the field displays the default branch plant information and is non-editable.

Item

Enter the Item using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Item Number field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Item Number field to activate the scanning device. Then, scan the barcode of the item using the scanning device.

See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Location

Enter the Location using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the To Location field. The system launches the device camera and you can scan the barcode of the location.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the To Location field to activate the scanning device. Then, scan the barcode of the item using the scanning device.
See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Lot Number

Enter the Lot Number using one of these options:

- Use the keyboard on your mobile device to manually enter the data.
- Use the Search icon to search and select the data.
- Use the camera application on your mobile device to scan the data.
To use this option, tap the QR Code button next to the Lot/Serial field. The system launches the device camera and you can scan the barcode of the equipment.
- Use a Bluetooth-enabled scanning device to scan the data.
To use this option, tap the Lot/Serial field to activate the scanning device. Then, scan the barcode of the item using the scanning device.
See [Section 4.2, "Setting Up the Bluetooth Option in the Mobile Device to Scan Barcodes"](#)

Quantity

Enter the quantity of the item you want to count.

Unit of Measure

Enter the unit of measure for the quantity of item.

Note: You can enter both Primary and Secondary Quantity and Unit of Measure if you have set the Secondary Quantity and Unit of Measure processing option as 1. See [Section 52.2.1, "Setting Processing Options for the Cycle Count Tablet Application \(M41240\)."](#)

5. After you complete entering the data, tap the Save button on the top right of the screen to save the data.
You can tap the Cancel button on the top left of the screen to cancel the data.

Part VIII

Supply Management

This part contains these chapters:

- [Chapter 53, "Purchase Order Approval Mobile Applications"](#)
- [Chapter 54, "Requisition Self Service Approvals Mobile Applications"](#)

Purchase Order Approval Mobile Applications

This chapter discusses these topics:

- [Section 53.1, "Purchase Order Approval Mobile Applications Overview"](#)
- [Section 53.2, "Setting Up the Purchase Order Approval Mobile Applications"](#)
- [Section 53.3, "Using the Purchase Order Approval Mobile Tablet Application \(M43082\)"](#)
- [Section 53.4, "Using the Purchase Order Approval Mobile Smartphone Application \(M43083\)"](#)

Important Note: Before using the mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- "Processing Approvals" in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
-
-

53.1 Purchase Order Approval Mobile Applications Overview

You use the Purchase Order Approval mobile applications to review, approve, and reject purchase orders on a mobile device.

The Purchase Order Approval mobile applications gives you the ability to:

- Review all orders that are currently awaiting your approval.
- View up to ten different order types.
- Enter line-level remarks on an order.

These remarks are updated to the F4318 table.

- Configure the order type names that appear in the mobile applications.
- Approve or reject an order.
- Enter order-level remarks when approving or rejecting an order.

These remarks are updated to the F4318 table.

This table lists the applications that are available to review, approve, and reject purchase orders:

Type of Application	Additional Information
Base EnterpriseOne application	To review, approve, and reject purchase orders, use the Purchase Order Approvals application (P43081) in the JD Edwards EnterpriseOne system.
Tablet application	Purchase Order Approval (M43082) To download the application to your tablet, search on the following text in the application store: <ul style="list-style-type: none"> JD Edwards Purchase Order Approval
Smartphone application	Purchase Order Approval (M43083) To download the application to your smartphone, search on the following text in the application store: <ul style="list-style-type: none"> JD Edwards Purchase Order Approval

Before using the Purchase Order Approval tablet and smartphone application, you must set the processing options for these applications.

53.1.1 Differences and Limitations: Purchase Order Approval

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

This table lists and explains the differences and limitations associated with the mobile purchase order review and approval functionality:

Differences and Limitations	Description
Connectivity to the network	The ability to review and approve or reject orders on a mobile device is supported only if the user is able to sign in and connect to the JD Edwards EnterpriseOne system. This functionality does not enable users to access purchase orders when not connected to the network.
Budget checking and approval	The mobile applications do not support budget checking or budget approval features that are available in the base EnterpriseOne application.
Line-level approvals	The mobile applications support only order-level approvals, and do not support line-level approvals.
Number of document types	The mobile applications enable users to approve up to ten different document types. The base EnterpriseOne approval application enables users to review and approve all order types.
Text attachment	Only the first text attachment available in the base application is displayed in the Notes field of the mobile applications. The text attachment is read-only in the mobile applications.

Language Support

Additionally, you should be aware of how a user's language preference can affect the search functionality for business unit and branch/plant records. See [Section 1.2.2.1, "Language Support for Business Unit and Branch Plant Searches"](#)

53.2 Setting Up the Purchase Order Approval Mobile Applications

Before you use the Purchase Order Approval mobile applications, you must:

- Set up versions of the Purchase Order Approvals program (P43081) for ten (10) order types that you want to use for the mobile applications.

Specify the Order Type processing option with the order type code from the UDC table (00/DT) for each of the P43081 version that you set up. You must also verify that the processing option values for the specified versions are valid to process data using the mobile device.

- Set up *Public versions of the M43082 and M43083 mobile applications in the Mobile Configurations program (P98950M). You set up the *Public versions of the applications in the EnterpriseOne system so that all users use the same version.

See [Chapter 2, "Versioning Mobile Applications"](#)

- Set up the processing options for the Purchase Order Approval tablet (M43082) and Purchase Order Approval smartphone (M43083) applications.

53.2.1 Setting Processing Options for the Purchase Order Approval Mobile Tablet and Smartphone Applications (M43082 and M43083)

You use these processing options to define the order types that are available for processing in the Purchase Order Approval mobile applications, and the version of the P43081 that is used to process each order type. Note that you need not set up all ten versions.

Important Note: When you specify a version of the P43081 to use for processing a document type using the mobile application, that version must contain a valid hold code in processing option 5 (Approval Holds Code) on the Process tab. This hold code must begin with an A, and must match the hold code used in the associated version of the P4310 program.

If the Approvals Hold Code processing is not specified or is improperly specified, the Hold Code will not be automatically released by the Orders Awaiting Approval program (P43081). You will have to remove the Hold Code manually with the Held Order Release program (P43070).

53.2.1.1 Defaults

Purchase Order Count Type 1, 2, 3, 4, 5, 6, 7, 8, 9, 10

Use these options to specify the description of the type of order that will display in the mobile applications. These options work with the corresponding options that follow them; that is, you will set up the first and second options to define the first order type, set up the third and fourth options to set up the second order type, and so on. The values for these options exist in the PO Approval Count Description UDC table (43/CO). The count descriptions must match the corresponding P43081 version.

For example, enter Purchase Orders in the first option, and enter the version of the P43081 that you use to process the purchase order document type (OP) in the second option. Similarly, you could enter Requisitions in the third option, and enter the version of the P43081 that you use to process the requisition document type (OR) in the fourth option.

Purchase Order Approval Version 1 (P43081) through 10

Use these options to specify the versions of the Purchase Order Approvals program (P43081) that you want to use when processing the order type that is specified in the previous option.

For example, if you entered Blanket Orders in the first option, you would enter the version of the P43081 that you use to process the blanket order document type (OB) in the second option.

Address Book Version (P01012)

Use this option to specify the version of the Address Book Version program (P01012) that you want to use to process address book information associated with the orders.

53.3 Using the Purchase Order Approval Mobile Tablet Application (M43082)

The Purchase Order Approval mobile tablet application (M43082) enables you to review purchase orders, and then approve or reject them from your mobile device.

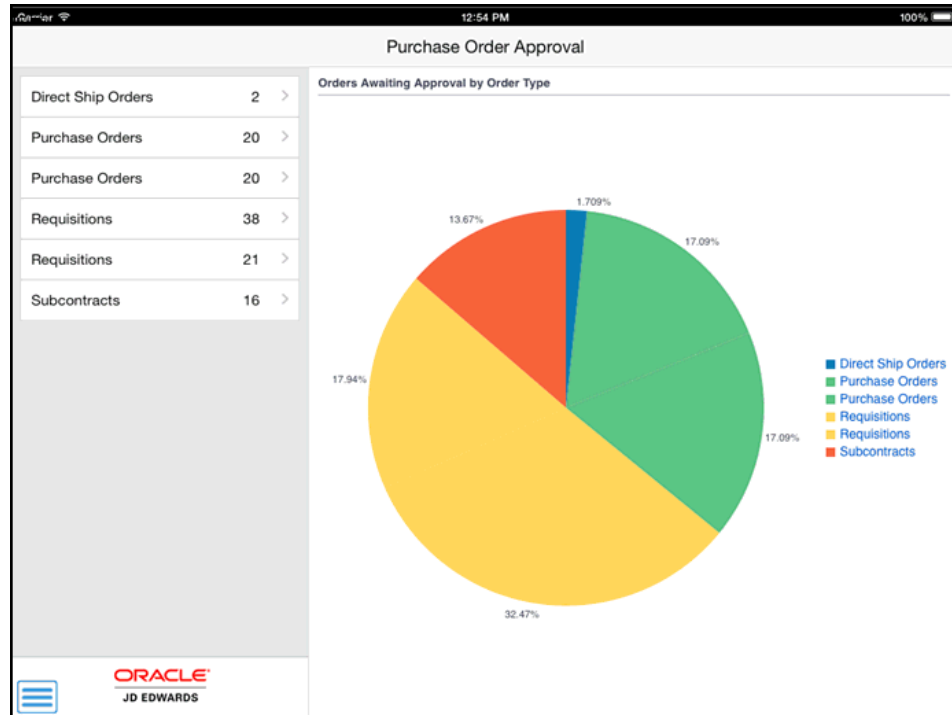
Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

53.3.1 Reviewing Purchase Orders Awaiting Approval Using a Mobile Tablet Application (M43082)

To review purchase orders awaiting approval:

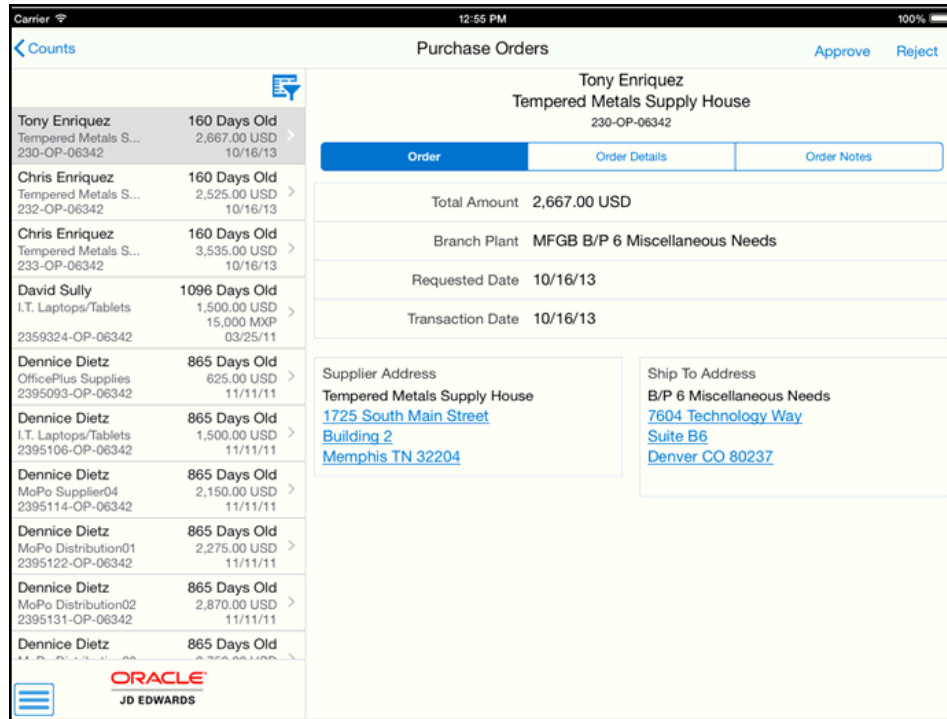
1. Open the application by tapping the PO Approval icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Purchase Order Approval home screen, you can see the number of each order type that is currently awaiting approval. To refresh the data on the screen, swipe down on the panel with the list of order counts.

Figure 53–1 Purchase Order Approval Home Screen: Tablet

3. The order counts fields on the left pane list the number of orders awaiting approval for each order type.

Note that the order counts displayed in these fields are also graphically displayed in the Orders Awaiting Approval by Order Type section on the right side of the screen.

4. Tap any of the order counts fields on the left pane, or segments in the pie chart to display a list of orders awaiting approval for that order type.

Figure 53–2 Purchase Orders - Order Screen: Tablet

- You can use filters to search and filter orders from the list. To filter orders, tap the filter icon at the top of the left pane.

Branch Plant

To add a branch plant to your search criteria, you can use the Visual Assist icon to search for a value and return it to the Branch Plant field, or you can manually enter the branch plant number in the field.

Originator

To add the originator of the purchase order to your search criteria, you can use the Visual Assist icon to search for a value and return it to the Originator field, or you can manually enter the address book number of the originator in the field.

In the filters screen, to continue the search by using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of orders that are displayed based on your filter values.
- Saves the filter values that you entered.

To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the screen that has the list of orders for the order type that you selected from the home screen.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all of the filter values you specified, and to enter new filter values, tap the Clear button.

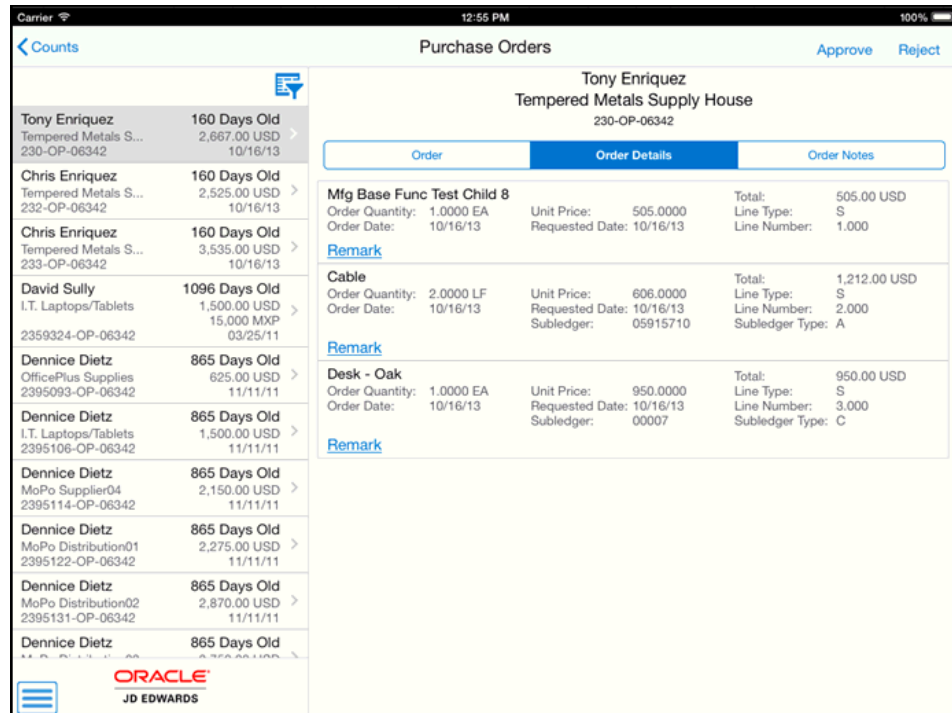
- In the right pane of the Purchase Orders screen, the system displays the first order in the list.

To review details about a different order, tap the order. The selected order is highlighted in the order list. The Order tab is open by default. In the Order screen, you can:

- Review the order header information, such as order amount, branch plant, and requested and transaction dates.
- Tap the data in the Supplier Address and the Ship To Address sections to use the device's map and navigational features.

7. To review details of the order, tap the Order Details tab.

Figure 53–3 Purchase Orders - Order Details Screen: Tablet



In the Order Details screen, you can:

- Review the details of the order. The system displays all the order lines that are awaiting approval for the purchase order. The detailed data that is displayed depends on what data is available in the EnterpriseOne database. Data can differ depending on the type of order. You might need to swipe down the screen to review all detail lines, depending on the size of the order.
 - To enter a remark about the selected line, tap the Remark button and complete the Remark field. You can enter up to 30 alphanumeric characters. This field is optional. When you enter remarks, the system shows the remarks next to the Remarks button.
8. To review notes associated with the order, tap the Order Notes tab. The application displays only the first text attachment available in the media object of the Purchase Order Approvals program (P43081).

53.3.2 Approving and Rejecting Purchase Orders Using a Mobile Tablet Application (M43082)

To reject or approve purchase orders, complete the following actions:

1. To reject purchase orders, tap the Reject button. On the Confirm Rejection screen, you can enter a reason for rejecting the order in the Remark field. You can enter up to 30 alphanumeric characters. This field is optional. Tap the Reject button on the Confirm Rejection screen. Note that you can also tap the Cancel button if you do not want to reject the order.
2. To approve purchase orders, tap the Approve button. On the Confirm Approval screen, you can enter an optional remark. Tap the Approve button on the Confirm Approval screen. Note that you can also click Cancel if you do not want to approve the order.
3. After approving or rejecting an order, the system returns you to the Purchase Orders screen. Notice that the orders you approved or rejected are no longer displayed, and the counts have been updated to reflect the number of orders currently awaiting approval.
4. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

53.4 Using the Purchase Order Approval Mobile Smartphone Application (M43083)

The Purchase Order Approval mobile smartphone application (M43083) enables you to review purchase orders, and then approve or reject them from your mobile device.

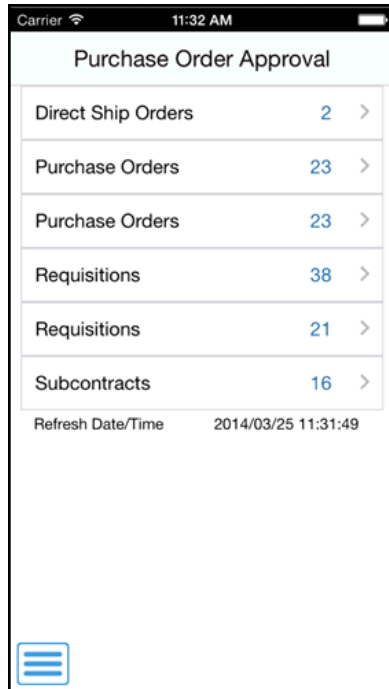
Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

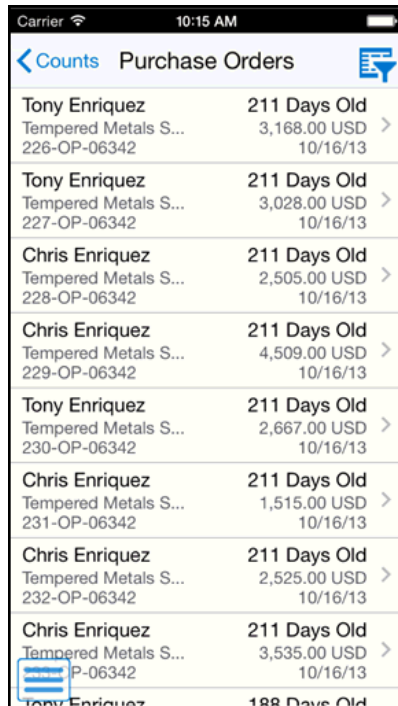
53.4.1 Reviewing Purchase Orders Awaiting Approval Using a Mobile Smartphone Application (M43083)

To review purchase orders awaiting approval:

1. Open the application by tapping the PO Approval icon on your device, and then log in.
See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)
2. From the Purchase Order Approval home screen, you can see the number of each order type that is currently awaiting approval. To refresh the data on the screen, swipe down on the screen.

Figure 53–4 Purchase Order Approval Home Screen: Smartphone

3. The order counts fields list the number of orders awaiting approval for each order type.
4. Tap any of the order counts fields to display a list of orders awaiting approval for that order type.

Figure 53–5 Purchase Orders List for an Order Type: Smartphone

- You can use filters to search and filter orders from the list. To filter orders, tap the filter icon at the top right of the screen.

Branch Plant

To add a branch plant to your search criteria, you can use the dropdown menu to search for the branch plant.

Originator

To add the originator of the purchase order to your search criteria, you can use the dropdown menu to search for the address book number of the originator.

In the filters screen, to continue the search by using the specified filter values, tap the Apply button. When you tap the Apply button, the system:

- Takes you to the list of orders that are displayed based on your filter values.
- Saves the filter values that you entered.

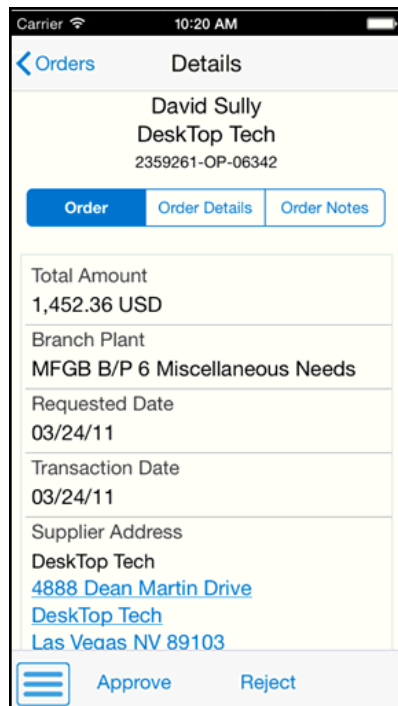
To discontinue the use of filter values in your search, tap the Cancel button. When you tap the Cancel button, the system:

- Takes you to the screen that has the list of orders for the order type that you selected from the home screen.
- Ignores the filter values that you entered, and restores the last saved filter values to the filter fields.

To delete all of the filter values that you specified, and to enter new filter values, tap the Clear button.

- To review details about an order, tap the order. In the Details screen, the Order tab is open by default.

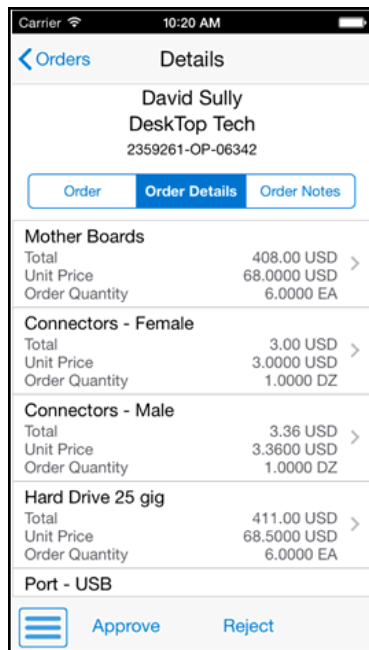
Figure 53–6 Order Screen: Smartphone



In the Order screen, you can:

- Review the order header information, such as order amount, branch plant, and requested and transaction dates.
 - Tap the data in the Supplier Address and the Ship To Address sections to use the device's map and navigational features.
7. To review details of the order, tap the Order Details tab.

Figure 53–7 Order Details Screen: Smartphone



In the Order Details screen, you can:

- Review the information available for each of the order lines that are awaiting approval for the purchase order. You might need to swipe down the screen to review all detail lines, depending on the size of the order.
 - Tap a line in the Order Details screen to review the details of the order line. The system takes you to the Line Detail screen.
8. In the Line Detail screen, you can review line-specific information. The data that is displayed depends on what data is available in the EnterpriseOne database. To enter a remark about the selected line, tap the Remark field and complete the field. You can enter up to 30 alphanumeric characters. This field is optional. To save the remark, tap the Save button at the top right of the screen.
9. To go back to the Order Details screen, tap the Order button at the top left of the screen.
10. To review notes associated with the order, tap the Order Notes tab. The application displays only the first text attachment available in the media object of the Purchase Order Approvals program (P43081).

53.4.2 Approving and Rejecting Purchase Orders Using a Mobile Smartphone Application (M43083)

To reject or approve purchase orders, complete the following actions:

1. To reject purchase orders, tap the Reject button. On the Confirm Rejection screen, you can enter a reason for rejecting the order in the Remark field. You can enter up to 30 alphanumeric characters. This field is optional. Tap the Reject button on the Confirm Rejection screen. Note that you can also tap the Cancel button if you do not want to reject the order.
2. To approve purchase orders, tap the Approve button. On the Confirm Approval screen, you can enter an optional remark. Tap the Approve button on the Confirm Approval screen. Note that you can also click Cancel if you do not want to approve the order.
3. After approving or rejecting an order, the system returns you to the Purchase Orders screen. Notice that the orders you approved or rejected are no longer displayed, and the counts have been updated to reflect the number of orders currently awaiting approval.
4. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

Requisition Self Service Approvals Mobile Applications

This chapter discusses these topics:

- [Section 54.1, "RSS Approvals Mobile Applications Overview"](#)
- [Section 54.2, "Setting Up the RSS Approval Mobile Applications"](#)
- [Section 54.3, "Using the RSS Approvals Mobile Tablet Application"](#)
- [Section 54.4, "Using the RSS Approvals Mobile Smartphone Application"](#)

Important Note: Before using the Requisition Self Service (RSS) Approvals mobile applications, Oracle strongly recommends that users have a complete understanding of how to use the associated processes and applications in the JD Edwards EnterpriseOne base software.

For additional information about the processes and applications associated with the mobile applications discussed in this chapter, see:

- [Reviewing and Approving Requisitions in the Requisition Self Service Implementation Guide.](#)
-
-

54.1 RSS Approvals Mobile Applications Overview

You use the RSS Approvals mobile application to enable the managers and buyers in your organization to review, approve, and reject requisition self-service orders on their mobile tablet or smartphone when they are away from the office.

The RSS Approvals mobile applications enables users to:

- Review and approve or reject order-level requisition self-service orders.
This action is typically completed by the manager of the employee who entered the requisition order.
- Review and approve or reject line-level requisition self-service orders.
This action is typically completed by the buyer or other member of the organization's procurement or purchasing department.

Note: To use line-level approval in the RSS Approval mobile application, line-level approvals must be set up in the base EnterpriseOne Requisition Self Service system.

If a requisition self-service order is set up to be approved at the line-level, each line associated with that requisition will appear separately on the Requisition Approval screen in the mobile application, as if it was a separate requisition.

See Understanding Approval Authority Constants for additional information.

- Enter remarks regarding why a requisition self-service order was approved or rejected.

This table lists the applications that are available to review and approve self-service requisition orders:

Type of Application	Additional Information
Base EnterpriseOne Application	Use these applications in the JD Edwards EnterpriseOne system to review, approve, and reject self requisitions: <ul style="list-style-type: none"> ■ Requisition Approval (P43E82) ■ Requisition Inquiry (P43E15) ■ Requisition Entry (P43E10)
Smartphone Application	Mobile Requisition Self Service Approval Phone (M43E821) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Requisition Self Service Approval
Tablet Application	Mobile Requisition Self Service Approval Tablet (M43E822) To download the application to your device, search on the following text in the application store: <ul style="list-style-type: none"> ■ JD Edwards Requisition Self Service Approval

Before using the RSS Approval mobile tablet or smartphone applications, you must first set the processing options for these programs:

- Mobile Requisition Self Service Approval Phone (M43E821)
- Mobile Requisition Self Service Approval Tablet (M43E822)

54.1.1 Differences and Limitations: RSS Approvals

Mobile applications are intended to be a simplified version of the applications that are available in the base software. In most cases, these applications provide a subset of the functionality available in the base software.

Be aware of the following differences when using the RSS Approval mobile applications:

- Display of Approved and Rejected Requisition Self-Service Orders
 The RSS Approval mobile application enables users to review only those requisition self-service orders that are currently awaiting their approval. You

cannot search for previously approved or rejected orders using the mobile application.

- **Initial Display of Requisition Self-Service Orders**

Upon entry, the mobile application automatically loads the screen with all requisition self-service orders awaiting the logged-in user's approval. The orders are listed in order of age, with the oldest order at the top of the screen.

Additionally, the user can view *only* those orders he or she is set up to approve.

54.2 Setting Up the RSS Approval Mobile Applications

Before using the RSS Approval mobile smartphone and tablet applications, you must first set the processing options to ensure that the mobile applications are accessing the correct program versions in the EnterpriseOne database.

54.2.1 Setting Processing Options for the Mobile Requisition Self Service Approval Phone Application (M43E821)

You use processing options to specify default processing information for a program.

54.2.1.1 Versions

1. Requisition Approval (P43E82)

Use this processing option to specify which version of the Requisition Approval program (P43E82) the mobile application uses when processing RSS approvals. If you leave this option blank, the system uses version ZJDE0001.

2. Requisition Entry (P43E10)

Use this processing option to specify which version of the Requisition Entry program (P43E10) the mobile application uses when processing RSS approvals. If you leave this option blank, the system uses version ZJDE0001.

3. Requisition Inquiry (P43E15)

Use this processing option to specify which version of the Requisition Inquiry program (P43E15) the mobile application uses when processing RSS approvals. If you leave this option blank, the system uses version ZJDE0001.

4. Address Book (P01012)

Use this processing option to specify which version of the Address Book program (P01012) the mobile application uses when processing RSS approvals. If you leave this option blank, the system uses version ZJDE0001.

54.2.2 Setting Processing Options for the Mobile Requisition Self Service Approval Tablet Application (M43E822)

You use processing options to specify default processing information for a program.

54.2.2.1 Versions

1. Requisition Approval (P43E82)

Use this processing option to specify which version of the Requisition Approval program (P43E82) the mobile application uses when processing RSS approvals. If you leave this option blank, the system uses version ZJDE0001.

2. Requisition Entry (P43E10)

Use this processing option to specify which version of the Requisition Entry program (P43E10) the mobile application uses when processing RSS approvals. If you leave this option blank, the system uses version ZJDE0001.

3. Requisition Inquiry (P43E15)

Use this processing option to specify which version of the Requisition Inquiry program (P43E15) the mobile application uses when processing RSS approvals. If you leave this option blank, the system uses version ZJDE0001.

4. Address Book (P01012)

Use this processing option to specify which version of the Address Book program (P01012) the mobile application uses when processing RSS approvals. If you leave this option blank, the system uses version ZJDE0001.

54.3 Using the RSS Approvals Mobile Tablet Application

The RSS Approval mobile tablet application enables you to review, approve, and reject requisition self-service orders that are awaiting your approval.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

54.3.1 Reviewing and Approving Self-Service Requisitions Using the RSS Approvals Mobile Tablet Application

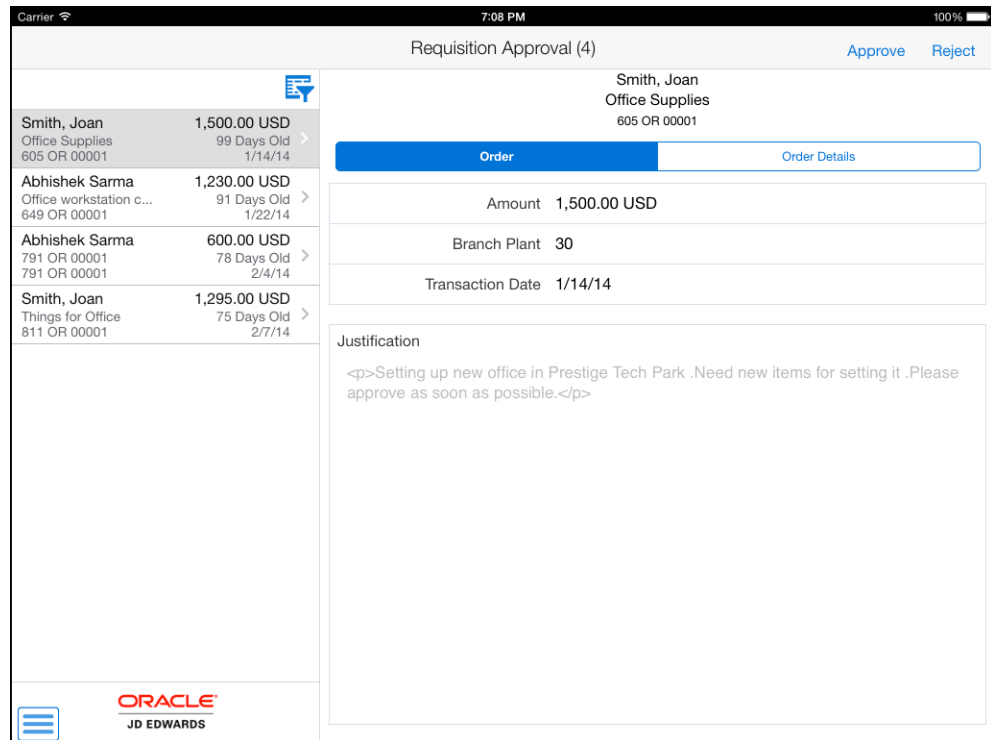
To review, approve, and reject requisitions:

1. Open the application by tapping the icon on your device, and then log in.

See [Chapter 3, "Logging Into Mobile Enterprise Applications"](#)

2. The Requisition Approval screen displays all requisition self-service orders currently awaiting your approval.

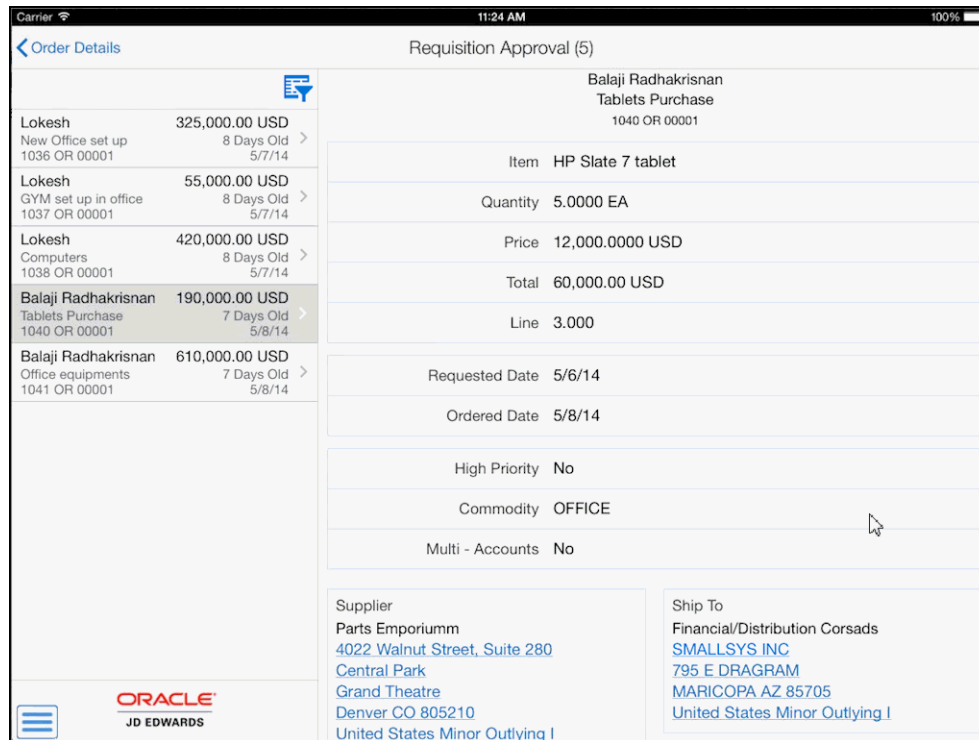
The number in the screen header represents the number of requisitions awaiting approval. The orders are listed in chronological order, with the oldest order at the top of the screen.

Figure 54–1 Requisition Approval Home Screen

3. To narrow your results, tap the filter button.
4. On the Filters screen, specify your selection criteria by completing these optional fields:
 - Requisition Date - From
 - Requisition Date - To
 - Requested By

Enter the Address Book Number of the requisition requestor in this field. If you do not know the number, tap the Visual Assist button, search for and select the requestor to populate this field.
5. Tap apply to use the entered search criteria. The system returns you to the Requisition Approval screen, displaying only those requisition self-service orders that meet the search filter criteria.

Alternatively, you can tap Clear to clear out the search filters, or tap Home to return to the Requisition Approval screen without using any additional filtering.
6. On the Requisition Approval screen, tap the requisition self-service order you want to review.
7. On the right side of the screen, you can review the order header information, and the justification information entered by the order originator.
8. To view details about each line on the order, tap the Order Details tab, and then tap any line item to review details about that line.

Figure 54–2 Requisition Approval: Line Detail

9. Tap the address in the Supplier or Ship To sections to use the map and navigation features on your mobile device.
10. Tap the Order Details button to return to the previous screen and approve or reject the order.
11. To approve the order, tap Approve. On the Confirm Approval screen, enter a remark (optional), and then tap Approve.
12. To reject the order, tap Reject. On the Confirm Reject screen, enter a remark (optional) and then tap Reject.
13. After confirming the approval or rejection, the system returns you to the Requisition Approval screen. Notice that the requisition you just approved or rejected is no longer displayed in the list.
14. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

54.4 Using the RSS Approvals Mobile Smartphone Application

The RSS Approval mobile smartphone application enables you to review, approve, and reject requisition self-service orders that are awaiting your approval.

Before you can use the application, you must download and install the application from the application store on your device.

To open the application, tap the icon and log in.

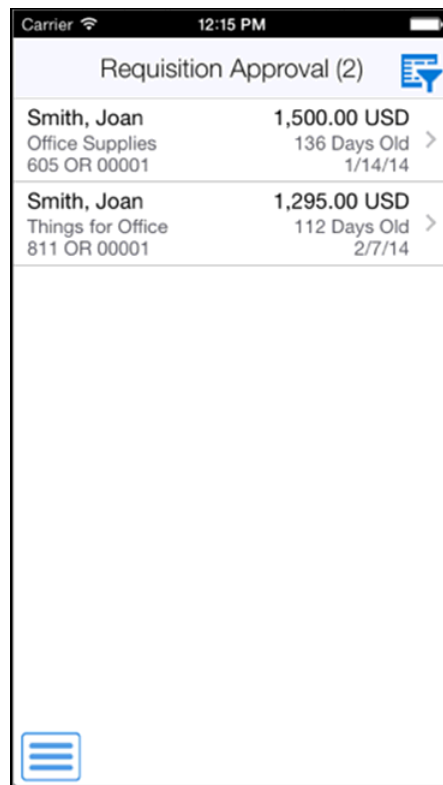
54.4.1 Reviewing and Approving Self-Service Requisitions Using the RSS Approvals Mobile Smartphone Application

To review, approve, and reject requisitions:

1. Open the application by tapping the icon on your device, and then log in.
2. The Requisition Approval screen displays all requisition self-service orders currently awaiting your approval.

The number in the screen header represents the number of requisitions awaiting approval. The orders are listed in chronological order, with the oldest order at the top of the screen.

Figure 54–3 Requisition Approval



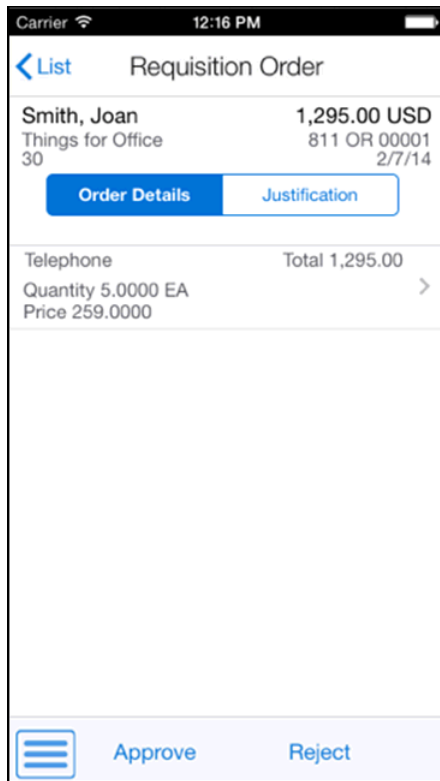
3. To narrow your results, tap the filter button.
4. On the Filters screen, specify your selection criteria by completing these optional fields:
 - Requisition Date Range - From
 - Requisition Date Range - To
 - Requested By

Enter the Address Book Number of the requisition requestor in this field. If you do not know the number, tap the Visual Assist button, search for and select the requestor to populate this field.
5. Tap apply to use the entered search criteria. The system returns you to the Requisition Approval screen, displaying only those requisition self-service orders that meet the search filter criteria.

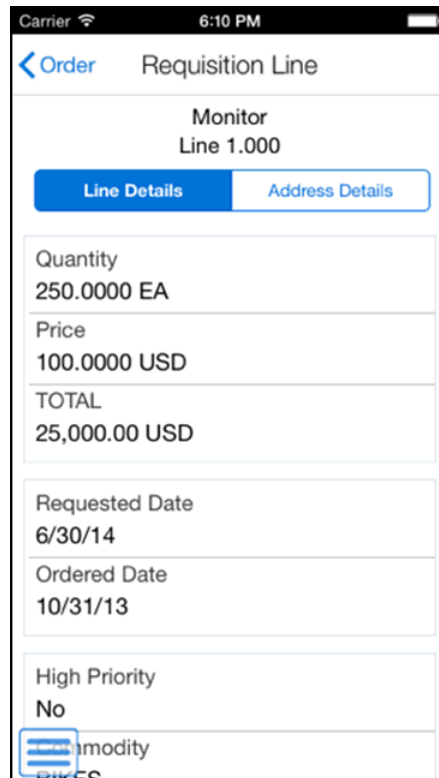
Alternatively, you can tap Clear to clear out the search filters, or tap Home to return to the Requisition Approval screen without using any additional filtering.
6. On the Requisition Approval screen, tap the requisition self-service order you want to review.

7. On the Requisition Order screen, you can review the order header information, and summarized information about each line included in the order.

Figure 54–4 Requisition Order



8. To review the justification for the requisition self-service order, tap the Justification tab. Tap the Back button to return to the Order Detail tab.
9. From the Order Detail tab, tap any line item to review details about that line.

Figure 54–5 Requisition Line

10. To review supplier address information, tap the Address Details tab.
Tap the address to use the map and navigation features on your mobile smartphone.
11. Tap the Order button to return to the Requisition Order screen and approve or reject the order.
12. To approve the order, tap Approve. On the Approve screen, enter a remark (optional), and then tap Confirm.
13. To reject the order, tap Reject. On the Reject screen, enter a remark (optional) and then tap Confirm.
14. After confirming the approval or rejection, the system returns you to the Requisition Approval screen. Notice that the requisition you just approved or rejected is no longer displayed in the list.
15. To log out of the application, tap the Menu button at the bottom left of the screen, and then tap Logout.

