

PeopleSoft®

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EnterpriseOne  
Work Orders 8.9  
PeopleBook

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**September 2003**



EnterpriseOne  
Work Orders 8.9 PeopleBook  
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## Work Orders Overview

The Work Orders system allows you to integrate all aspects of creating and processing work orders with the rest of your business operations.

This section provides overview information about work orders concepts and the Work Orders system.

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

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## Industry Information for Work Orders

The term *work order* has numerous meanings with a wide variety of applications. The following definition is from the Educational Society for Resource Management dictionary (APICS), Tenth Edition:

"Work Order: 1) An order to the machine shop for tool manufacture or equipment maintenance; not to be confused with a manufacturing order. Synonym: work ticket. 2) An authorization to start work on an activity (for example, maintenance) or product.

This definition suggests that work orders are more widely used for maintenance functions. However, companies often use the same definition for other activities, including service requests and manufacturing activities. Other terms for which this definition applies can include job order, work request, service request, or shop order.

Regardless of the terminology, the concept is the same. Generating a work order is the activity that starts the process of completing a task. The work order identifies the work that needs to be done, and the information that it collects captures the history of the work that is performed. The J.D. Edwards Work Order system can be used to track the following:

- Manufacturing of parts
- Equipment repair
- Project management
- Customer service calls

## Competitive Advantage

The following are typical problems or issues for using work orders, the strategy that will resolve these problems, and the return on investment.

**How do I integrate the Work Order system with other J.D. Edwards systems?**

Work order features are available in many of the J.D. Edwards systems, including Shop Floor Management and Enterprise Asset Management. In addition, you can use work orders to manage small projects in the Job Cost system.

**How do I indicate the parts and materials that**

You can attach a list of parts and materials to any work order. The list provides information for parts and materials to be committed or issued from inventory.

<b>are required to complete a work order task?</b>	<p>You can generate purchase orders directly from the list that is attached to the work order.</p> <p>The Work Order system integrates with the Inventory Management system. This integration eliminates the need to maintain individual inventory systems to support different groups. Integration reduces setup labor costs, ensures the accuracy of your information, and eliminates the need to purchase parts that might already be available.</p>
<b>What types of information can I print on work orders?</b>	<p>You can print work orders that include text, part lists or bills of materials, and routings. You can also include additional information using standard descriptions, user defined codes, record types, and so on.</p> <p>The Work Order system provides online and printed information that workers can use to help eliminate errors.</p>
<b>How can I reuse past work order information?</b>	<p>You can use a parent work order to copy information to a new work order. On the new work order, you can add any unique information.</p> <p>Using a parent work order reduces labor costs and provides consistency between similar work orders and tasks.</p>
<b>How do I ensure that an approval process for work orders exists?</b>	<p>Workflow Management provides the ability to create automated processes that can perform various work order activities. For example, the system can automatically send a message to a supervisor for his or her approval when the cost of a work order exceeds a defined amount. You can also use workflow to prompt you about other events, such as committing inventory to a work order.</p> <p>Workflow Management ensures that you receive the appropriate approvals before you begin work. This reduces time that is spent on invalid work orders and communicates activities to the appropriate people.</p>
<b>How do I control and track the progress of a work order?</b>	<p>Work order activity rules can control a work order lifecycle to ensure that it progresses in a controlled manner. Work order activity rules can eliminate the mishandling or the improper movement of work orders, which prevents any work from being performed or parts from being issued for unapproved work orders, thereby eliminating labor costs and wasted parts.</p>
<b>Can I associate work orders with a project?</b>	<p>Using Project Setup, you can create a project hierarchy to group work orders as a project. You can also use a master version of a project work order to generate work orders that use the same basic information.</p> <p>You can use project hierarchies to reduce input labor and provide consistency between similar tasks in a project. Project hierarchies simplify project and task tracking and improve project management.</p>
<b>How can I track work orders?</b>	<p>You can track work orders in many ways, such as by:</p> <ul style="list-style-type: none"> <li>• Customer number</li> <li>• Parent work order number</li> <li>• Project number</li> <li>• Job or business unit</li> <li>• Cross-referenced piece of equipment</li> </ul> <p>The Work Order system simplifies management of similar or related orders.</p>

The system reduces the amount of time that you spend searching for and tracking work orders.

## **System Integration**

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

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

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

- Address Book
- General Accounting
- Payroll
- Workforce Management
- Inventory Management
- Procurement
- Accounts Payable
- Enterprise Asset Management
- Job Cost
- Service Billing

## **Work Order Management Features**

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The Work Orders system provides the user with a set of functionality that streamlines creating and processing work orders. You can create work orders quickly and online. You can also track them by status and route them for approval automatically. The system also provides project management features, such as budget and estimate controls as well as project tracking and reporting.

### **Quick Creation of Work Orders**

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

## **Approvals for Work Orders**

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

## **Activity Rules for Work Orders**

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

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

## **Paperless Processing**

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

## **Quick Location of Work Orders**

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

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

## **Simple Budget and Estimate Controls**

You can use the work orders programs to track the simple estimate and budget requirements of a work order. For example, you can enter budget information and track the information throughout the work order's life cycle. In addition, you can use a variety of reports to compare estimates with actual information.

### **Multiple Control Dates**

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

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

### **Multiple Levels of Responsibility**

You can assign several levels of responsibility to each work order on the Work Order Entry form, such as:

- The job or business unit that is charged for the work order
- The originator of the work order
- The manager
- The supervisor

You can also use category codes to assign levels of responsibility to work orders. You can review all of the work orders that are assigned to a particular person or location.

### **Unlimited Narrative Remarks**

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

- Expected actions
- Actual operations performed
- Required tools
- Procedures for completing the work

You define the record types that are appropriate to your organization.

## **Project Setup and Tracking**

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

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

## **Flexible Project Management Reporting**

You can manage projects using the following reports:

<b>Cost Summary</b>	Provides cost summary information, such as estimated and actual costs for work orders.
<b>Cost Detail</b>	Provides cost detail information, such as individual transaction details for work orders.
<b>Work Order Summary</b>	Provides summary information about work orders, such as hours planned and actual hours charged as of a specified date.
<b>Detailed Task Description</b>	Provides detailed information about the work orders in a project.
<b>Project Status Summary</b>	Provides summary and detailed status information for all work order projects that are assigned to a specific manager.

## **Work Order Tables**

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<b>Business Unit Security (F0001)</b>	Contains authorization for users of business unit information.
<b>Next Numbers (F0002)</b>	Assigns a unique number to each work order that you create.
<b>User Defined Codes (F0005)</b>	Stores valid user defined system codes and descriptions.
<b>Business Unit Master (F0006)</b>	Stores job and business unit information.
<b>Generic Message/Rates (F00191)</b>	Stores general instructions that relate to a work order.
<b>Address Book Master (F0101)</b>	Contains name and address information for the customer, manager, originator, and supervisor.
<b>Account Master (F0901)</b>	Contains the chart of accounts information.
<b>Account Balances (F0902)</b>	Stores balances by account and by work order. It also stores information by ledger type and fiscal year.
<b>Account Ledger (F0911)</b>	Stores amount and unit information for each work order. The work order information is stored as a subledger with a subledger type of W.
<b>Work Order Default Coding File (F48001)</b>	Stores default manager and supervisor codes for work orders by category codes 01 through 03.
<b>Work Order Record Types File (F48002)</b>	Contains the valid work order record types. It stores header information for the Work Order Instruction table.
<b>Work Order Master File (F4801)</b>	Stores information about a work order, such as the description, estimated hours, responsibility, and costing information. It also stores planned start and end dates. This table contains one record for each work order.
<b>Work Order</b>	Stores description text and the various record types that are defined in the user

<b>Instructions File (F4802)</b>	defined codes, such as Description of Request and Final Disposition. This table contains one record per line of instruction.
<b>W.O. Status Action Table (F4826)</b>	Stores activity rules that relate to a work order.
<b>Work Order Approval Routing (F4827)</b>	Stores rejection status of work orders.

---

## Work Order Creation

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

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

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

---

## Creating Work Orders

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

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

The system stores master records in the Work Order Master File table (F4801). You use the Scheduling Workbench program (P48201) to search the Work Order Master table.

You can use processing options to have the system enter default information, such as type, priority, status, and so on, in a new work order. You can also use processing options to assign the manager and supervisor, if you defined them when you set up the system. You can assign record types to a work order and then enter descriptive information into each record type to note the specific details about the task. For example, you might want to include special instructions and the parts and tools that are needed to complete the task.

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

You can also use a parent work order to create a work order. After entering a parent work order number in the Parent Number field on the Enter Work Orders form, the system updates any fields without values with the values from the parent work order. When you leave the Parent Number field blank, the system uses the work order number. To use a work order as a parent work order, leave its Parent Number field blank.

---

**Note**

You cannot delete a work order if it has any account ledger transactions associated with it or is used as a parent work order. You can, however, inactivate a work order by entering a code in the Subledger Inactive field on Enter Work Orders. A value other than blank indicates that the work order is inactive.

---

## Entering Basic Work Order Information

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

You can assign up to 10 category codes to a work order. Use category codes to further identify and organize work orders that have similar characteristics. This is especially useful for analyzing and reporting on work order information from a variety of perspectives, such as shop, division, and type of work. You can also analyze work order costs according to category codes. J.D. Edwards provides several predefined category codes. You can use these or customize your own category codes. You define all values for each category code.

In addition, you can assign responsible people, such as an originator and a supervisor, to a work order. You can also specify a search cross-reference that the system uses to search for work orders. For example, if you enter an equipment number on the work order, the system enters the parent equipment number in the Search Cross-Reference field.

---

**Note**

Many of the fields on Enter Work Orders are optional, but information in these fields is particularly useful when you search for a work order or group of work orders. You can use processing options to direct the system to enter default values in several fields, such as address book fields, category code fields, approval type fields, and manager and supervisor fields, if you defined them during system setup.

---

You can also retrieve numerous default values from a parent work order, if you specify one. For example, you can use values from a parent work order to provide default values for the following fields:

- Work Order Type
- Start Date
- Planned Completion Date

**Before You Begin**

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

**► To enter basic work order information**

---

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

1. On Work With Work Orders, click Add.

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Select Workspace: Active Foundation

Active Foundation Personalize Change Role Sign Out

Enter Work Orders

OK Cancel Form Tools

Order Number

Description

General Dates/Assignments Classification

Status Comment <input type="text"/>	Parent Number <input type="text"/>
Search X-Ref <input type="text"/>	Charge to BU <input type="text"/>
W.O. Status <input type="checkbox"/>	Cost Code <input type="text"/>
Type <input type="checkbox"/>	Est. Hours <input type="text"/>
Priority <input type="checkbox"/>	Est. Amount <input type="text"/>
Std. Description <input type="text"/>	Tax Expl Code <input type="text"/>
Flash Message <input type="checkbox"/>	Tax Rate/Area <input type="text"/>
Subledger Inact <input type="checkbox"/>	

2. On Enter Work Orders, complete the following field:

- Description

3. On the General tab, complete the following field:

- Charge to BU

4. Complete the following optional fields:

- Status Comment
- Search X-Ref
- W.O. Status
- Type
- Priority
- Std. Description

You can use the Standard Description user defined code to assign standard procedures or instructions to multiple work orders. Standard Descriptions are stored in the Generic Message/Rates table (F00191).

- Flash Message
- Subledger Inact

You cannot delete a work order if it has any account ledger transactions associated with it or is used as a parent work order. You can, however, make a work order inactive by entering a code in the Subledger Inactive field. A value other than blank in this field indicates that the work order is inactive.

- Parent Number  
The default value for the parent number is the work order number.
  - Cost Code
  - Est. Hours
  - Est. Amount
  - Tax Expl Code
  - Tax Rate/Area
5. Click the Dates/Assignments tab and complete the following optional fields:
- Planned Comp
  - Date Assigned
  - Start Date
  - Transaction
  - Originator  
If you leave the Originator field blank, the system enters an originator based on your address book number.
  - Supervisor  
You can enter address book numbers to track originator and supervisor information for a work order. You can set up your system to automatically enter the address book number of the supervisor for work orders.
  - Customer  
Depending on how you set processing options, you might be required to enter a customer number.
  - Manager
6. To assign category codes to work orders, click the Classification tab and complete the following optional fields:
- Phase
  - Category 02
  - Category 03
  - Category 04

- Category 05
- Status
- Service Type
- Skill Type
- Experience Level
- Category 10

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**Note**

Category code 1 is a four-character category code that appears on all work order reports and most forms that are associated with work orders.

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7. Click OK.

## Entering Record Type Descriptions

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

Depending on the type of information that you need to include, you can enter text in two formats. You define the format for each record type when you set up work orders. The formats are:

- Description only
- Description with three columns

You can also copy descriptive information from another work order.

### ► To enter record type descriptions

---

*Use one of the following navigations:*

*For the Work Orders system, choose Work Order Entry from the Work Order Processing menu (G4811).*

*For the Enterprise Asset Management system, choose Work Order Entry from the Work Order menu (G1316).*

1. On Work With Work Orders, locate a work order by completing any of the following fields on the General tab and then clicking Find:
  - Equipment Number
  - Business Unit
  - Subsidiary

- Parent W.O. No

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

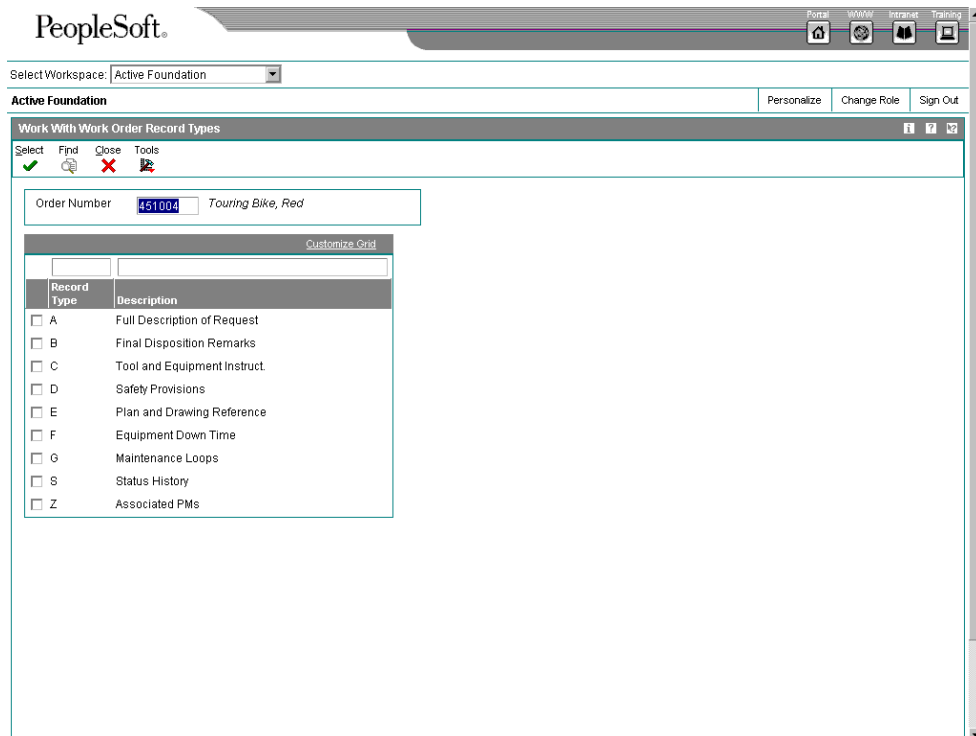
---

**Note**

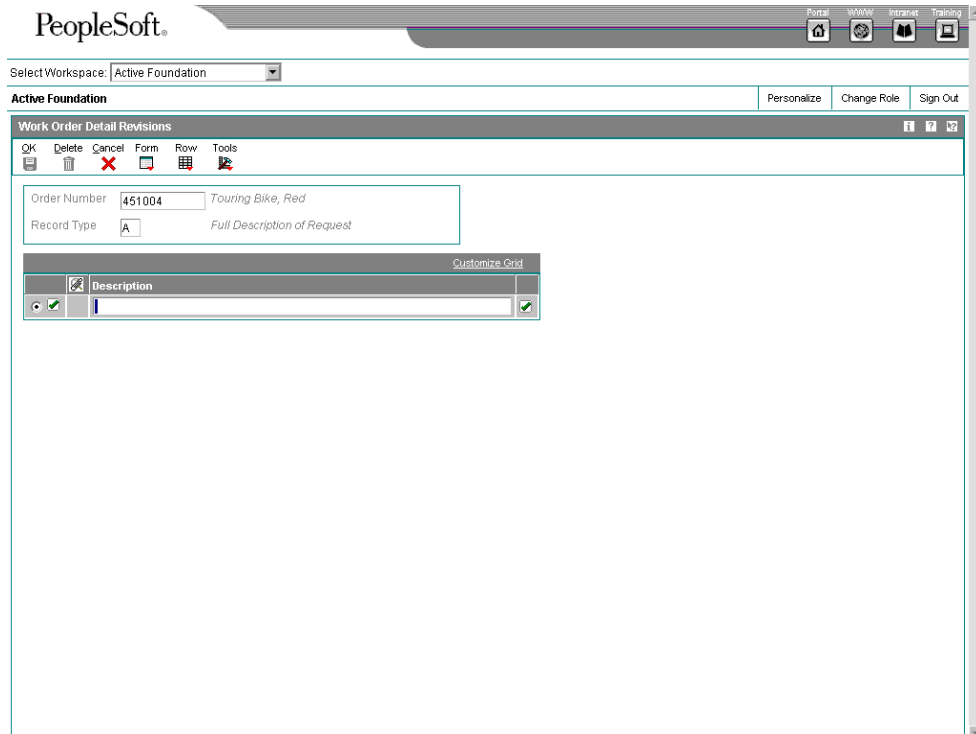
If you access this program from the Enterprise Asset Management system, the Equipment Number field might appear as Serial Number or Unit Number, depending on which setting you choose in the Equipment Constants program (P001012).

---

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



3. On Work With Work Order Record Types, choose a record type and click Select.



4. On Work Order Detail Revisions, complete the following field with a unique description for the selected record type for this work order, and then click OK:
  - Description
5. To enter descriptions for other record types for this work order, repeat steps 3 through 4.

## Processing Options for Work With Work Orders (P48201)

### Defaults 1

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

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

### Defaults 2

---

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

1. From Status Code W.O.
2. Thru Status Code W.O.
3. Type - W.O.
4. Document Type
5. Models

Blank = Do not include models

1 = Include models

Defaults 3

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

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

Versions

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

1. Work Order Print (R17714) Version

Blank = XJDE0001

2. Equipment Work Order Print (R48425) Version

Blank = XJDE0001

3. Project Work Order Print (R48415) Version

Blank = XJDE0001

4. Tenant Work Order Print (R15448) Version

Blank = XJDE0001

5. Completed PM (P12071) Version

Blank = ZJDE0001

6. Parts Detail (P17730) Version

Blank = ZJDE0001

7. Labor Detail (P17732) Version

Blank = ZJDE0001

8. Inventory Issues (P31113) Version

Blank = ZJDE0002

9. Time Entry (P311221) Version (S/WM Only)

---

Blank = ZJDE0001

10. Work With Returned Material Authorization (P40051) Version (S/WM Only)

Blank = ZJDE0001

11. Open Purchase Order (P4310) Version

Blank = ZJDE0011

12. Returned Material Authorization Revisions (P400511) Version (S/WM Only)

Blank = ZJDE0001

13. On Line Work Order Quote (P17717) Version (S/WM Only)

Blank = ZJDE0001

14. Time Entry By Employee (P051121) Version

Blank = ZJDE0001

15. Work with Failure Analysis (P17766) Version

Blank = ZJDE0001

16. Failure Analysis (P17767) Version

Blank = ZJDE0001

17. Supplier Recovery Generation (R1776) Version

Blank = XJDE0001

18. Status History (P1307) Version

Blank = ZJDE0001

19. Work with Equipment Work Orders (P13220) Version

Blank = ZJDE0001

20. Work Order Cost (P48211) Version

Blank = ZJDE0001

21. Resource Assignment (P48331) Version

Blank = ZJDE0001

WO Entry

1. Work Order Entry Program

1 = Work Orders (P17714)

2 = Project Task Details (P48014)

3 = Tenant Work Orders (P15248)

2. Work Order Entry Version

Blank = ZJDE0001

Process

1. Priority

---

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Blank = Do not highlight and color code  
1 = Highlight and color code

## 2. Customer Self-Service Functionality

Blank = Bypass Customer Self-Service functionality.  
1 = Activate Customer Self-Service functionality for use in Java/HTML.  
2 = Activate Customer Self-Service functionality for use in Windows.

---

## Working with Supplemental Data

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

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

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

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

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

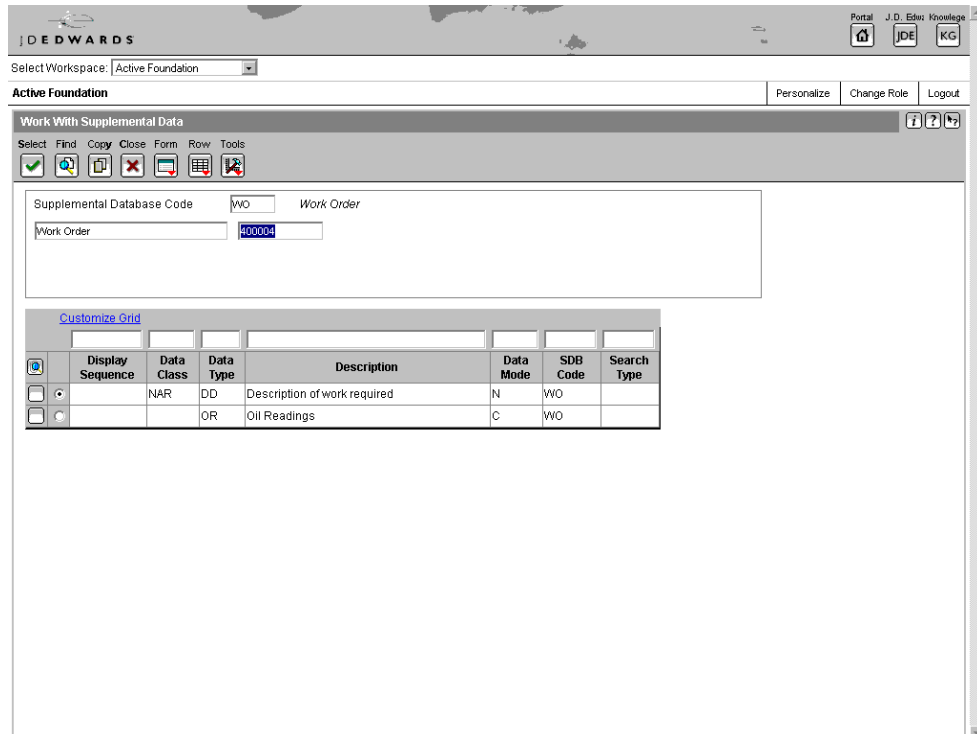
### Before You Begin

- Set up the supplemental data types for the work orders in your system.

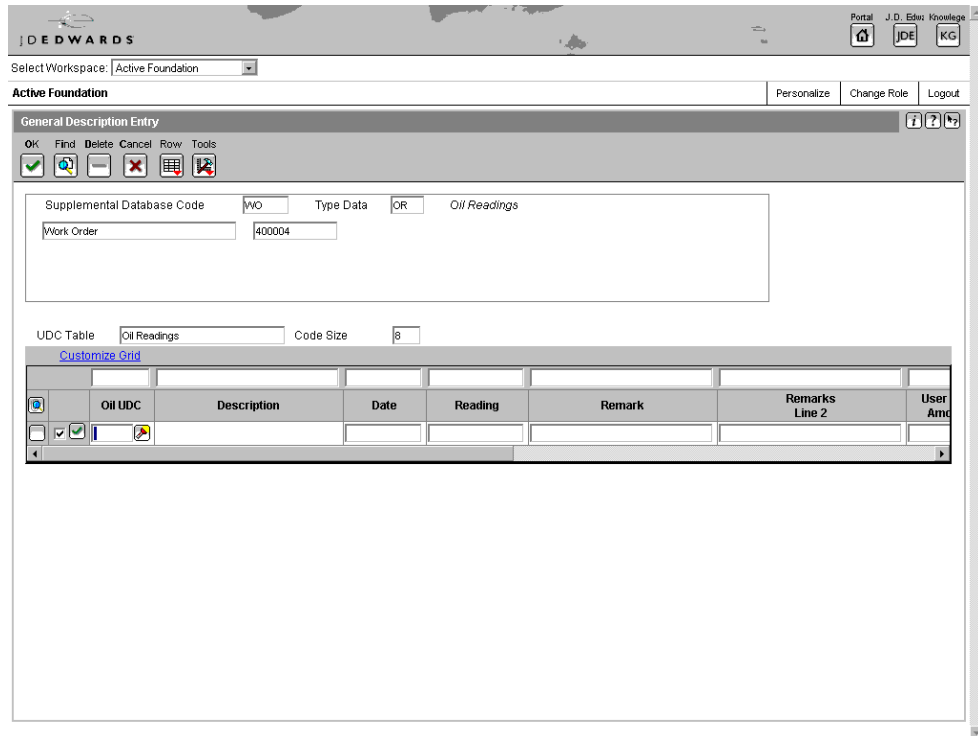
### ► To add supplemental data to work orders

---

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



1. On Work With Supplemental Data, enter the order number in the following field (Work Order) and click Find to display a list of valid supplemental data types for a work order.
  - WO.Number
2. Choose the data type for which you want to enter supplemental data for this work order, and click Select.
  - If the data type is in Narrative format, go to Step 3.
  - If the data type is in Code format, go to Step 5.
3. For Narrative data types, on Media Object Viewer, click the Text button.
4. Type the narrative text, such as safety procedures, and then click Save.



5. For Code data types, on General Description Entry, complete any of the fields, as necessary, and then click OK.

## Processing Options for Supplemental Data (P00092)

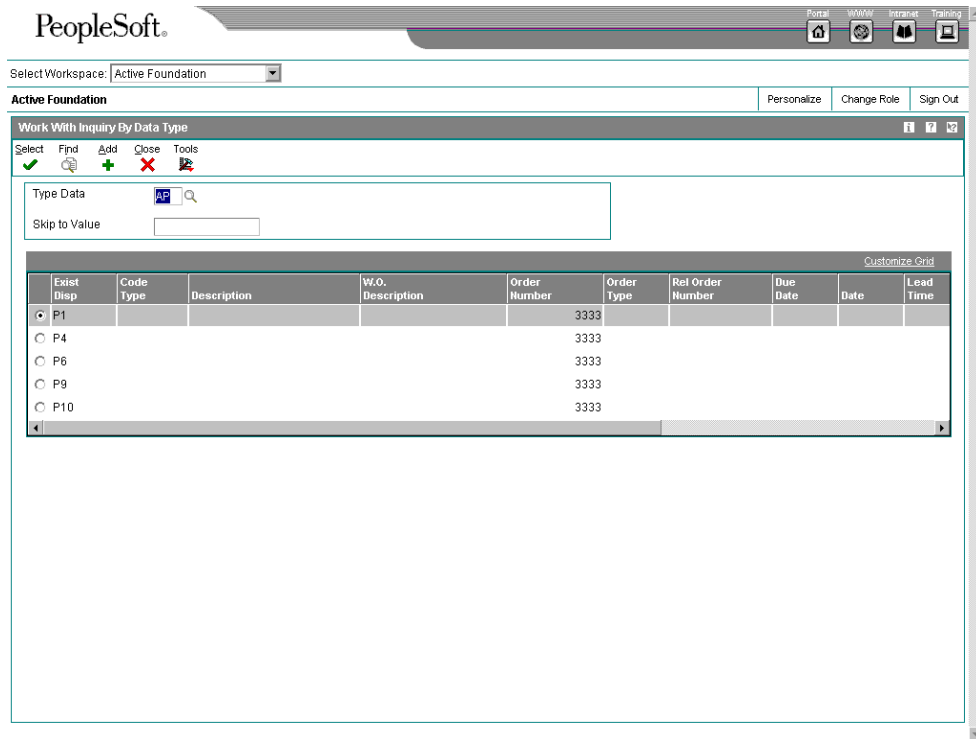
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### Processing

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

► **To review supplemental data by type**

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



1. On Work With Inquiry By Data Type, complete the following field and click Find:
  - Type Data
2. Choose a work order to review, and then click Select.
3. On Work Order Data Revisions, review the additional information.  
You can also revise any of the information, as needed.

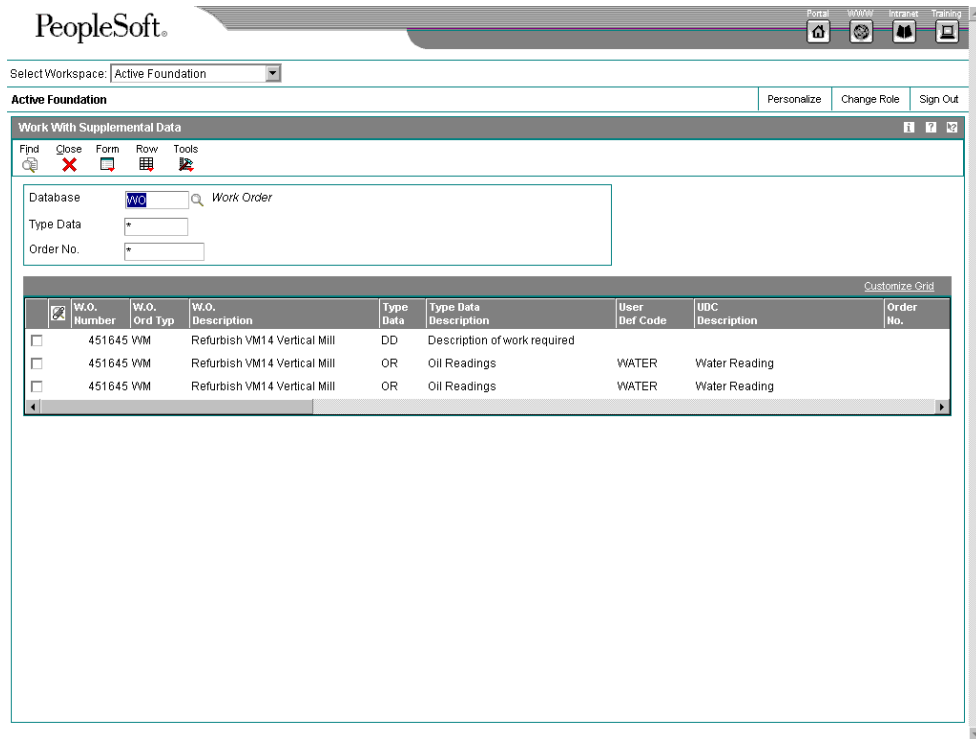
## Processing Options for Inquiry by Data Type (P480210)

### Display option

1. Enter the Work Order Data Base. Only Data Types with this Data Base can be displayed on the screen. Leave blank to default Data Base "E" (Engineering Change Orders).
2. Enter the Date Type within the Data Base above to default on the screen. If left blank, no Data Type will be defaulted.

► **To review supplemental data by work order**

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



1. On Work With Supplemental Data, complete the following field and click Find:
  - Order No.
2. To view additional information, choose a record in the detail area, and then choose the appropriate option from the Row menu.

## Processing Options for Work With Supplemental Data (P480200)

### Defaults

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

### Supplemental Database Code

#### Defaults (Cont)

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

### Type Data

## Copying Parent Work Orders

---

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

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

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

When you copy an existing work order, the system assigns a unique number to the new work order. Otherwise, the following information remains unchanged:

- All information from the Work Order Details form
- Parts list
- Labor routing instructions
- Record types

You can also use a parent work order as the basis for creating a work order. The system uses the information stored in the master record for the parent work order to automatically enter the basic work order information, category codes, and record type information into the new work order. Use this method when you need to group work orders that share information that is used for reporting and cost accounts.

### Before You Begin

- Ensure that the processing option selection for the Work Order Entry program (P48012) is set to the program that you want to call for the purpose of copying a work order.

### ► To copy parent work orders

---

*Use one of the following navigations:*

*For the Work Orders system, choose Scheduling Workbench from the Work Order Processing menu (G4811).*

*For the Enterprise Asset Management system, choose Work Order Entry from the Work Order menu (G1316).*

1. On Work With Work Orders, click Add.
2. On Enter Work Orders, complete the following field in the header area:
  - Description
3. On the General tab, complete the following field:
  - Parent Number
4. Complete any fields that must contain unique information, including the following fields:

- Tax Expl Code
  - Tax Rate/Area
5. Leave the remaining fields blank so that the system can complete them with values from the parent work order.
  6. Click OK.

The system provides default information from the parent work order for those fields that you left blank. It also copies the parts list, routing instructions, and record types from the original work order to the new work order.

7. Click Cancel.
8. On Work With Work Orders, locate the new work order.

The work order is identical to the one that you copied, except that it has a unique parent order number. You can revise any of the fields that contain information from the parent work order and enter any additional information, such as category codes and record types.

## Creating Work Orders for a Project

---

For a group of maintenance tasks that are interrelated and subordinate to a larger task, such as a plant shutdown or the retooling of a manufacturing line, you can combine the tasks into a project. Setting up a project is especially useful when you need to monitor the day-to-day details of a project within the context of the project as a whole.

Creating work orders for a project is similar to creating work orders with parent information. However, when you use the Project Setup program (P48015) to create the work orders, you can create several work orders at the same time and group them into a hierarchy that is subordinate to an existing parent work order. The parent work order represents the project, and each work order that is assigned to the parent represents a task in the project.

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

Use processing options to specify which work order detail form appears when you want to enter additional work order information. You can then enter additional information about each work order, such as status comments or an extended description of the task.

### ► To create work orders for a project

---

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

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

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

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

- Job or BU

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

3. For each work order in the project, complete the following fields in the detail area:

- Phase
- Task
- Start Date
- Planned Complete
- Hours
- Manager

4. Click OK.

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

5. To locate and revise any of the unique information for your project work orders, choose Project Setup from the menu again, and then, on Project Setup, click Find.

6. Choose a work order and then choose WO Detail from the Row menu.

PeopleSoft

Select Workspace: Active Foundation

Active Foundation Personalize Change Role Sign Out

Enter Work Orders

OK Cancel Form Tools

Order Number: 20001

Description: Replace Seal Post

General Rates/Assignments Classification

Status Comment	<input type="text"/>	Parent Number	<input type="text"/>
Search X-Ref	<input type="text"/>	Charge to BU	M30 Eastern Manufacturing c
W.O. Status	E1 ECO Entered	Cost Code	<input type="text"/>
Type	<input type="text"/>	Est. Hours	21.00
Priority	3 Normal	Est. Amount	<input type="text"/>
Std. Description	<input type="text"/>	Tax Expt Code	<input type="text"/>
Flash Message	2 Operation Scheduling	Tax Rate/Area	<input type="text"/>
Subledger Inact	<input type="checkbox"/> Active Subledger		

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

## **Processing Options for Project Setup (P48015)**

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### Processing

1. Enter a '1' to default the manager and supervisor based on the values for category codes 1, 2 or 3.
  2. Enter the defaults for the following fields:
    - a. Type
    - b. Priority
    - c. Beginning Status
    - d. Phase ( Category Code 1)
    - e. Category Code 2
    - f. Categories Code 3  
Program
  1. Choose the work order entry program to call when the option exit is used:
    - '2' = Equipment Work Order (P48011)
    - '3' = Work Order Entry (SAR) (P48012)
    - '4' = Manufacturing Work Order (P48013)
    - '5' = Project Task Details (P48014)(default)
-

---

## Work Order Processing

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

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

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

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

After you create work orders, you can perform a variety of tasks to manage the work orders as they move through the work order life cycle. For example, you can do the following:

- Search for specific work orders or groups of work orders.
- Revise information, such as start date, priority, status, and so on, as work orders move through the life cycle; and demands on your maintenance organization change.
- Review information about the parts lists for work orders.
- Print copies of work orders for use by maintenance people.
- Change the status of a work order to complete, indicating that the maintenance tasks have been performed.

---

## Locating Work Orders

Within a typical organization, hundreds of work orders might await processing. You can use specific search criteria in the Scheduling Workbench program (P48201) to limit your search for particular work orders. You use the information that you know about specific work orders to narrow your search. For example, you can locate all work orders that share the same criteria, such as the following:

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

- Dates associated with the work orders, such as start date and planned completion date

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

After you locate a work order, you can use the Scheduling Workbench program to access a variety of forms and complete multiple tasks with a specific work order. For example, after you locate a work order, you can access the form for approving work orders directly from the Scheduling Workbench, so that you do not have to access additional menus.

## **Cross-System Functionality**

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

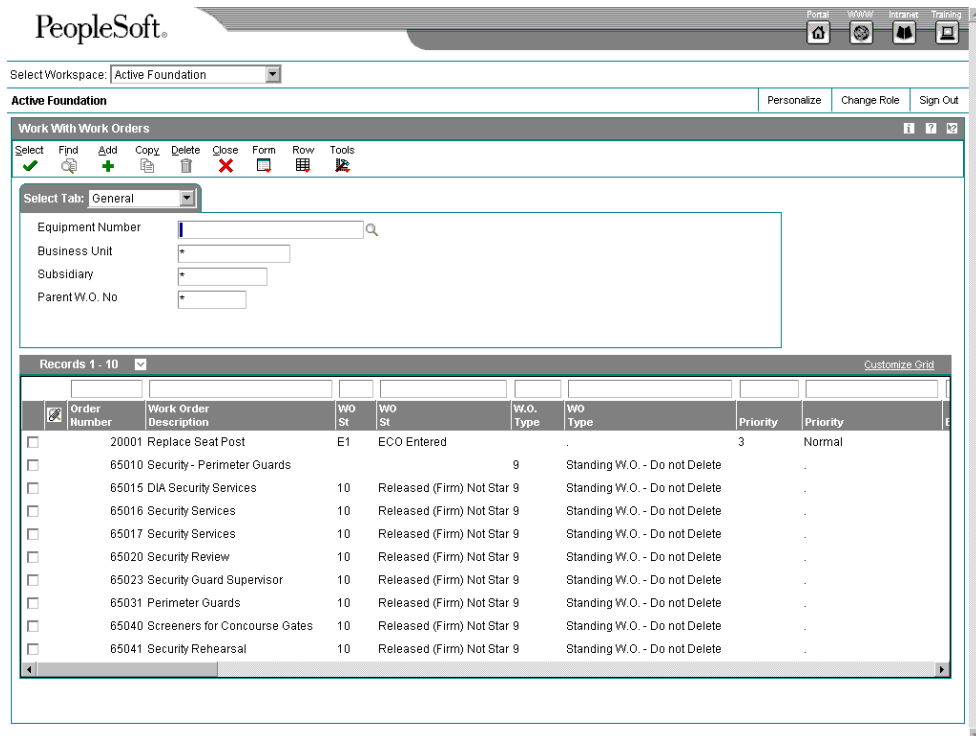
- Work With Unscheduled Maintenance (P13UM)
- Work With Equipment Work Orders (P13220)
- Capacity Message Summary (P3301)
- Preventive Maintenance Backlog (P12071)
- Work Order Parts Detail (P17730)
- Work Order Labor Detail (P17732)
- Work Order Inventory Issues (P31113)

You must have the Procurement system to access Purchase Orders (P4310).

### **► To locate a work order**

---

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



On Work With Work Orders, complete any of the following fields to locate a work order and click Find.

- Equipment Number
- Business Unit
- Subsidiary
- Parent W.O. No

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

## Working with Work Order Approvals

You can review, approve, or reject work orders. After a work order is created, the system sends an electronic message to notify the person who is responsible for reviewing and approving the work order. When you approve a work order, the system then sends an electronic mail message to the next person on the work order approval route. If you reject a work order, the system sends an electronic mail message to the originator of the work order. You can use the Scheduling Workbench program (P48201) to review these messages.

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

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

## Approving Work Orders

You can use the Scheduling Workbench program (P48201) to review and approve work orders. You can also directly access these work orders from the Employee Queue Manager program (P012503) on the Workflow Management menu (G02).

### Before You Begin

- ❑ Set up user profiles for all people who are responsible for approving work orders.
- ❑ Verify that all people who are responsible for approving work orders are included in the work order approval routing.

### ► To approve work orders

---

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

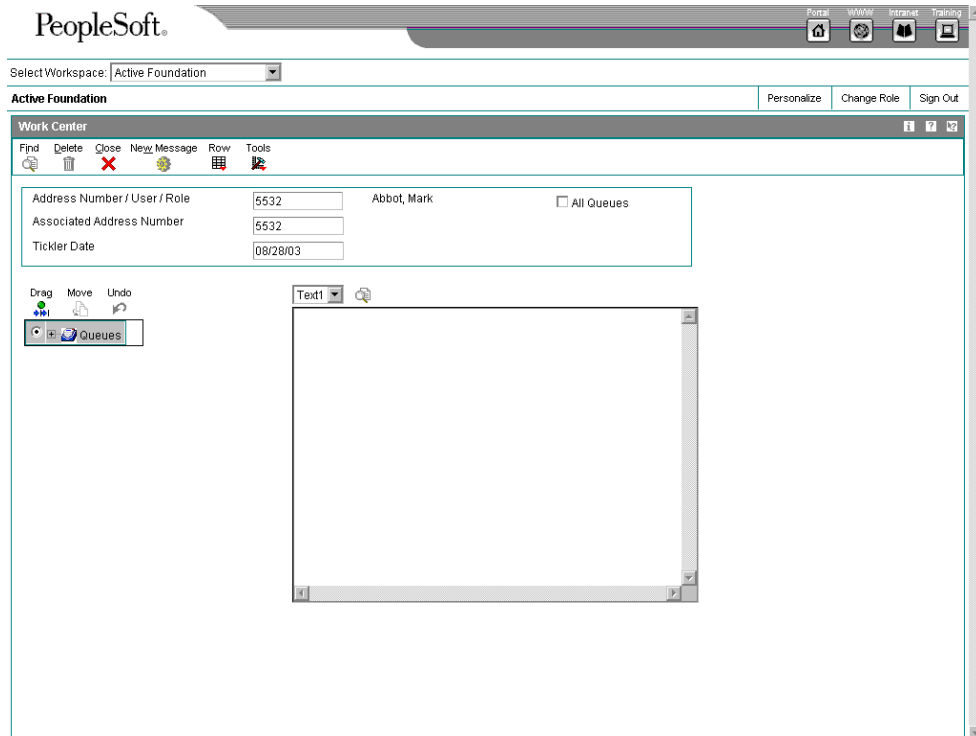
1. On Work With Work Orders, complete any of the following fields and click Find:

- Equipment Number
- Business Unit
- Subsidiary
- Parent W.O. No
- Order Number

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

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

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



3. On Work Center, use the messaging system to approve or reject the work order and to route it to the next responsible individual.

## Reviewing the Approval History of Work Orders

You can use Scheduling Workbench to monitor the status and progress of work orders. You can review the current approval status of any work order in your system. When you enter a work order number in the Scheduling Workbench program (P48201), the Process Task Monitor form displays the following:

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

You can also review any notes about the work order.

### ► To review the approval history of work orders

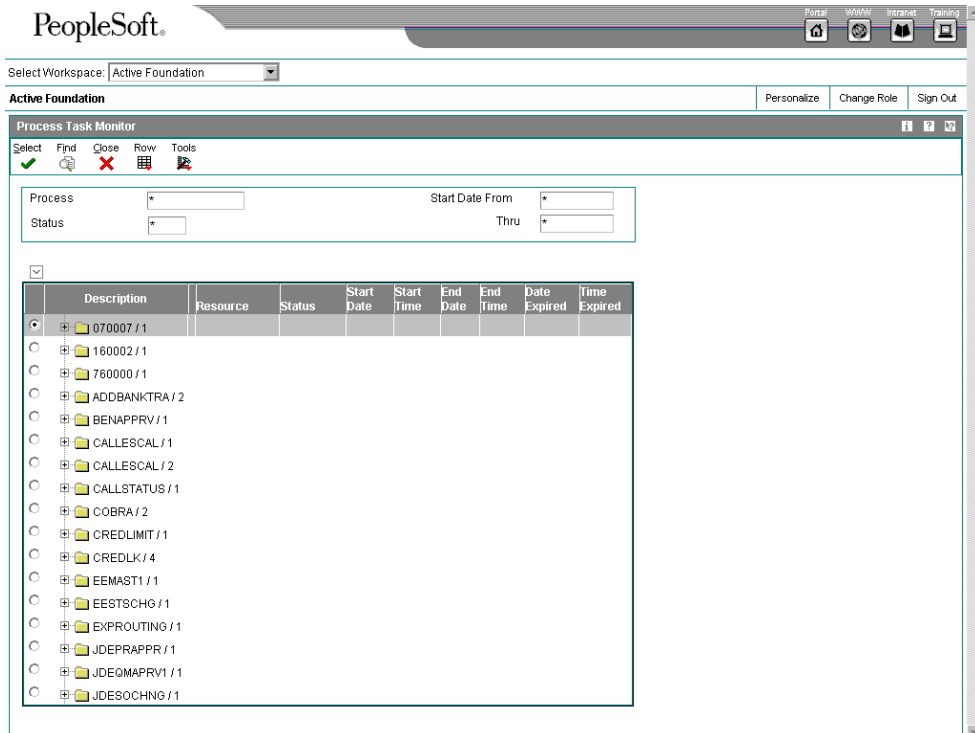
*From the Work Order Processing menu (G4811), choose Scheduling Workbench.*

1. On Work With Work Orders, complete any of the following fields and click Find:
  - Equipment Number
  - Business Unit
  - Subsidiary

- Parent W.O. No
- Order Number

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

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



3. On Process Task Monitor, review any notes that the approver might have entered for the work order, and then click Close.

## Revising Work Orders

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

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

- Life cycle statuses
- Planned start and completion dates
- Percentage of work completed

- Estimated hours to complete the work

For example, you can change the start date of work orders if you do not have the labor resources or parts that you need to complete the work.

You can use search criteria to narrow your search to the specific work orders that you want to revise. This narrowed search is especially useful when you need to revise the information in a single field for a group of related work orders.

► **To revise work orders**

---

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

1. On Work With Work Orders, to limit your search to a specific work order or group of work orders, complete any combination of fields on any of the tabs and click Find.
2. Choose the work order that you need to revise and click Select.
3. On Enter Work Orders, make any necessary revisions to the work order information.
4. To update life cycle information, complete the following field on the General tab and click OK:

- W.O. Status

If you located multiple work orders in step 1, repeat steps 2 through 4 for each work order that you need to revise.

## **Printing Work Orders**

---

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

### **Printing a Single Work Order**

You can print a single work order when you need a copy of a work order. For example, shop personnel might need to print a copy of a work order for each piece of equipment that they service. If you already know the work order number, you can quickly print the work order from the Scheduling Workbench program (P48201). You use processing options to specify which version of the Work Order Print program (R17714) that the system uses to print the order.

► **To print a single work order**

---

*Use one of the following navigations:*

*For the Work Orders system, choose Scheduling Workbench from the Work Order Processing menu (G4811).*

*For the Enterprise Asset Management system, choose Work Order Entry from the Work Order menu (G1316).*

*For the Service Management system, choose Work Order Entry from the Daily Work Order Processing menu (G1712).*

1. On Work With Work Orders, to limit your search to a specific work order, complete any combination of fields on any of the tabs and click Find.
2. Choose the work order that you want to print, and then choose Print WO from the Row menu.

### **Printing Multiple Work Orders***From the Work Order Processing menu (G4811), choose Work Order Print.*

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

You print work orders when you need a hard copy of a group of work orders. When you print work orders, you use data selections to specify which work orders to print or suppress. You then use processing options to specify the information that you want to print, such as whether to suppress dates associated with work order record type information, suppress estimated hours associated with work orders, or print equipment messages associated with a piece of equipment on the work order. In addition, you can enter record types to be printed with a work order. You also can specify whether the system changes the status of the work orders at the same time that it prints them.

## **Working with Charges to Work Orders**

---

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

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

For example, using subledger accounting, you can do the following:

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

### **Adding Charges to Work Orders**

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

---

**Note**

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

---

## Cross-System Functionality

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

**Time Accounting, Inventory Management, and Accounts Payable** You can access Inventory Management and Accounts Payable by using selections on the Work Order Processing menu. To access Time Accounting, you need to enter the fast path menu number. You must have installed these systems to use them with the Work Orders system.

**Inventory Management** You can use the Inventory Issues program (P4112) to enter charges for inventory and materials for a work order.

### See Also

- *Issuing Inventory in the Inventory Management Guide*

## Speed Code Entry

You can save time and reduce the possibility of data entry error by using speed codes when you add charges to work orders. Speed codes are a quick way of entering an account number that is already in the system so that you do not have to re-enter the information. When you use speed code entry, the system does the following:

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

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

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

Example: \1919.SHOP

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

Example: \1919.SHOP

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

- Inventory Base and Order Processing (system 40)

- Inventory Management (system 41)

#### **Time Accounting**

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

Example: \1919.

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

- Workforce Management Foundation (system 05)
- Stand-alone Time Accounting (system 05T)
- Payroll (system 07)
- Payroll (Canadian system 77)

In addition, you must set up accounting rules for work orders.

#### **► To add charges to work orders**

---

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

1. To enter a typical accounts payable voucher, on Speed Voucher Entry, enter the information for the accounts payable voucher.
2. To enter work order information, complete the following fields:
  - Account Number
  - Sub-ledger
  - Subledger Type
3. Click OK.

#### **See Also**

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

### **Processing Options for Speed Voucher Entry (P0411SV)**

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#### Manual Checks

1. Enter a '1' for manual checks

1 = Manual Check Creation

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

1 = Auto Payment Numbers

MBF Version

1. Enter the version of the Voucher Entry Master Business Function to be used for Speed Voucher Entry. If left blank, version ZJDE0001 (of application P0400047) will be used.

Version

---

### **Reviewing Charges by Job or Business Unit**

To help control costs and increase productivity, you can review work order costs that are charged to a particular job or business unit. You can review a summary of these costs, or you

can review the charges that are within a specific date range or ledger type. If you do not limit your search criteria, the system displays all work orders within the job or business unit, along with the estimated hours, actual hours, and costs for each work order.

► **To review charges by job or business unit**

---

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

1. On Work Order Cost by Job, complete the following field:

- Job or BU

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

2. Complete the following optional fields and click Find:

- Ledger Type
- Phase
- From Date/Period
- Thru Date/Period

3. To review accumulated totals for a work order, complete the following field and click Find:

- Phase

The system displays accumulated totals, beginning with the first work order in the phase that you choose.

4. To review detailed transaction information for a work order, choose a record in the detail area, and then choose Work Order Cost from the Row menu.

## **Reviewing Charges by Work Order**

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

- Description of the transaction
- Account number that was charged
- Units that are charged, such as hours
- Amount of the transaction
- Batch number and the date
- Person responsible for the transaction
- Document number and document type
- Inventory item number or description

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

---

**Note**

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

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► **To review charges by work order**

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

1. On Work With Work Order Cost, complete the following field:
  - Order Number
2. Complete the following optional fields and click Find:
  - Ledger Type
  - From
  - Thru

The system displays details about each work order transaction.

## **Processing Options for Work Order Cost (P48211)**

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### Defaults

#### 1. Ledger Type Versions

##### 1. Work Order Backlog (P48201) Version

Blank = ZJDE0001

##### 2. Inventory Issues (P31113) Version

Blank = ZJDE0001

##### 3. Time Entry (P051121) Version

Blank = ZJDE0001

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## Work Order Reports

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

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

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

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

---

## Printing Cost Reports

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

### Printing the Cost Summary Report

*Use one of the following navigations:*

*For the Work Orders system, choose Work Order Cost Summary from the Work Order Processing menu (G4811).*

*For the Enterprise Asset Management system, choose Print WO Cost Summary from the Work Order menu (G1316).*

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

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

The system retrieves information for this report from the following tables:

- Work Order Master File (F4801)

- Account Ledger (F0911)

## Processing Options for Print Work Order Cost Summary (R48497)

---

Process

1. Date Range

a. From Date:

b. Thru Date:

Defaults

1. Ledger Type

Blank = 'AA'

---

## Printing the Cost Detail Report

*Use one of the following navigations:*

*For the Work Orders system, choose Cost Detail from the Work Order Processing menu (G4811)*

*For the Enterprise Asset Management system, choose Print WO Cost Detail from the Work Order menu (G1316).*

Print the Work Order Cost Detail report to review detailed information about the costs that you charge to work orders. You use processing options to specify the date range for the report. The report includes:

- Actual hours and amounts charged to each work order
- The G/L date for each transaction
- An explanation of each transaction
- Total hours and amounts by phase code

The system retrieves information for this report from the following tables:

- Work Order Master File (F4801)
- Account Ledger (F0911)

## Processing Options for Print Work Order Cost Detail (R48498)

---

Process

1. Date Range

a. From Date

b. Thru Date

Defaults

1. Ledger Type

Blank = 'AA'

---

## Printing Project Management Reports

---

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

### Printing the Work Order Summary Report

*Use one of the following navigations:*

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

*From the Work Order menu (G1316), choose Print WO Status Summary.*

Print the Work Order Summary Print report (R48496) to review summary information for tracking and comparing the progress of selected work orders. The report includes:

- The priority (designated by P)
- The planned completion date
- The number of hours that are planned for each work order
- The number of actual hours that are charged as of the date that you specify on the report
- The difference between hours that are planned and hours that are charged to date
- The status of the work order at the time that you run the report

The system draws information for this report from the following tables:

- Work Order Master File (F4801)
- Account Ledger (F0911)

### Processing Options for Work Order Summary Print (R48496)

---

Print

#### 1. Equipment Number Format

Blank = Do not display Equipment Number

1 = Asset Number

2 = Unit Number

3 = Serial Number

Defaults

#### 1. Ledger Type

Blank = 'AA'

---

## Printing the Detailed Task Description

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

The Detailed Task Description report (R48492) lists the work orders that are included in a project. For each work order, the report includes the following:

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

## Printing the Project Status Summary

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

The Project Status Summary report (R48495) contains summary and detailed status information about all of the projects that are assigned to a specific manager, including the following:

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

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

## Processing Options for Print Project Status Summary (R48495)

---

Print

### 1. Print Ledger Type

A specific ledger type  
Blank = All ledger types

---

---

## Work Order System Setup

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

---

### Setting Up User Defined Codes for Work Orders

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

After you set up user defined codes, you can assign them to work orders. You can set processing options for the Work Order Entry program (P48201) so that the system assigns default values for user defined codes on work orders.

#### Type Codes (00/TY)

Use these codes to group work orders by type, such as emergency work order or preventive maintenance work order. The system displays this classification code field in the Scheduling Workbench program (P48201).

The Work Order Processing system includes predefined type code values. If these type codes do not meet your needs, you can modify them or create new ones.

#### Work Order Priority Codes (00/PR)

Use these codes to group work orders by priority, such as urgent or low. The system displays this classification code field in the Scheduling Workbench program (P48201).

Priority codes classify work orders by priority, such as H for high priority and 1 for emergency priority. These codes are for reference only and do not affect the scheduling or planning of work.

#### Work Order Status Codes (00/SS)

Use these codes to group work orders by current condition. You can update the status code for a work order as work progresses. The system displays this classification code field on a variety of forms related to the life cycle of a work order, such as Work With Work Orders and Work Order Details.

Status codes classify work orders by current status in the work order life cycle, such as A for approved and AP for approval pending. You can update the status code for a work order as work progresses.

#### Work Order Category Code 01 (00/W1)

Category code 01 is a special four-character user defined code that appears on all work order forms and reports. You can use category code 01 for the work order phase or matter codes. Use phase or matter codes to do the following:

- Group families of work orders into phases or subcategories for project management and cost account purposes.
- Group families of work orders on invoices by special matter or explanation code.

If you do not want to use category code 01 for phase and matter codes, you can modify the predefined codes or create new ones.

Phase or matter codes indicate the implementation phase of the work order, such as 2 for project phase 2. You can use phase codes to group work orders for project management and cost accounting purposes.

## **Additional Work Order Category Codes (00/W2 - 00/W0)**

Use category codes 02-10 to customize and further define your work orders. (Category code 10 is UDC table 00/W0.) Category codes 02-10 have no predefined values; they can represent any category or description by which you want to group work orders. For example, you can set up one category code to represent types of problems encountered in the work order process, such as improper installation or design flaws. Another code might represent locations where work is taking place.

The system displays the first ten category codes in the Scheduling Workbench program (P48201). You can set up these codes to help you limit your search for work orders.

For example, you can set up category code 2 as a work order failure code to indicate reasons for equipment failure. You can then set up codes to indicate equipment failure due to the following:

- Operator error
- Design flaw
- Lubrication or cooling problem

## **Work Order Detail Specifications Codes (00/RT)**

Use work order detail specifications codes to organize the descriptive information that you enter and track for your work orders. Work order detail specifications codes organize the descriptive information that you enter for your work orders, such as S for safety provisions and E for equipment downtime. For example, you might set up work order detail specifications to include the following types of information:

- Tool and equipment instructions
- Safety provisions
- Equipment downtime

## **Work Order Databases (00/WD)**

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

## Setting Up Standard Procedures

---

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

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

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

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

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

### ► To set up standard procedures

---

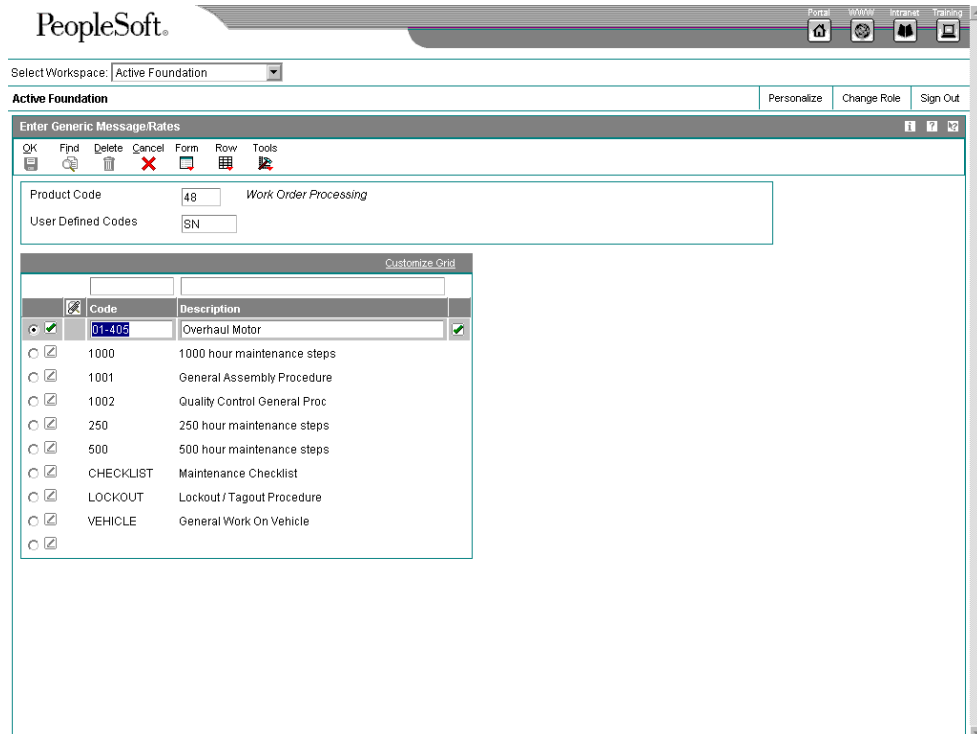
*Use one of the following navigations:*

*For the Work Orders system, choose Standard Procedures from the Work Order Setup menu (G4841).*

*For the Product Data Management system, choose Standard Procedure Descriptions from the Product Data Management Setup menu (G3041).*

*For the Shop Floor Management system, choose Standard Procedures from the Shop Floor Management Setup menu (G3141).*

1. On Work With Generic Message/Rate Types, click Select or Add.



2. On Enter Generic Message/Rates, in a blank record, complete the following fields:
  - Code
  - Description
3. Choose the record that you entered and then choose General Message from the Row menu.
4. On General Message, to enter new message text, complete the following field:
  - Description  
Enter a description of the standard procedure.
5. Click OK and go to Step 12.
6. On General Message, to copy message text from another procedure, choose Search from the Row menu.
7. On Standard Text Search, complete any of the following fields and click Find:
  - Product Code
  - User Defined Codes
  - Message Number
8. Choose the rows of text to copy and click Select.  
The text that you selected to copy appears on the General Message form.
9. On General Message, click OK.

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

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

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

## Processing Options for Standard Procedures (P00191)

---

### Defaults

1. System Code

2. Record Type  
Display

1. Text Type

1 = Display Rate Text  
2 = Display Message Text

2. Text Column Display

1 = 60 Column Display  
2 = 80 Column Display

---

## Setting Up Default Managers and Supervisors

---

You can set up address book information so that certain managers and supervisors appear by default on work orders. This default information is based on any combination of the first three work order category codes that appear on the Work Order Entry and Scheduling Workbench forms. The system automatically enters address book values in the following fields:

- ANPA (Supervisor)
- ANSA (Manager)

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

### Before You Begin

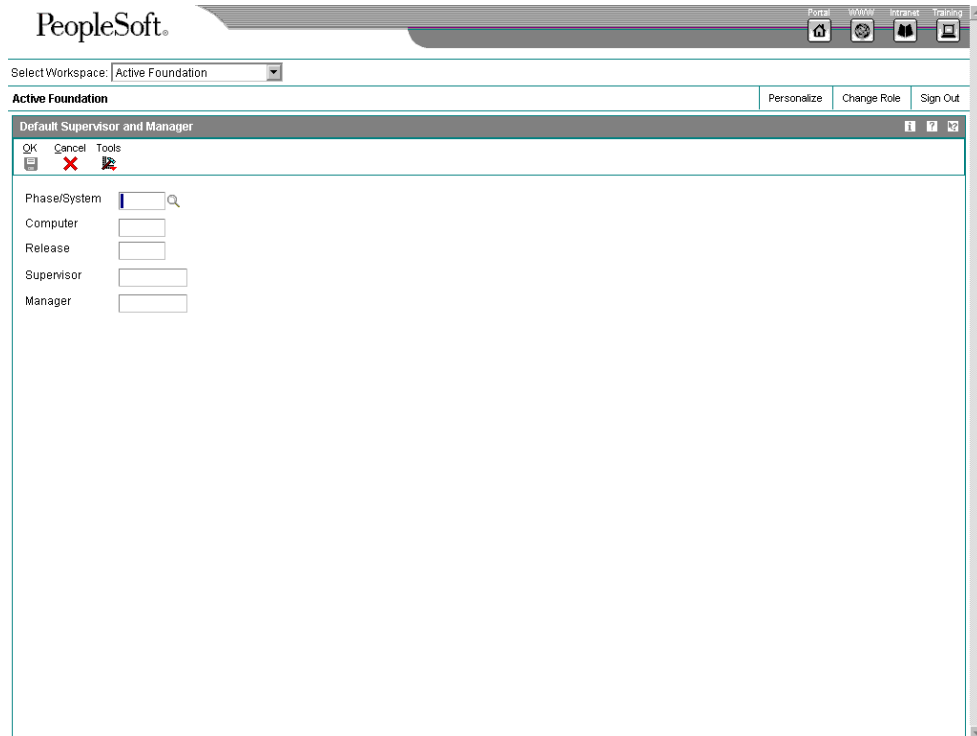
- ❑ Set the processing options for the Work Order Entry (P48201) and Project Setup (P48015) programs to use default values for the manager and supervisor address book numbers.

### ► To set up default managers and supervisors

---

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

1. On Work With Work Order Default Codes, click Add.



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

---

**Note**

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

---

## Setting Up Approvals for Work Orders

---

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

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

### Setting Up Activity Rules for Work Orders

For work orders, use activity rules to:

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

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

You must set up a reject code as the last status for any set of activity rules that use an approval process.

#### ► To set up activity rules for work orders

---

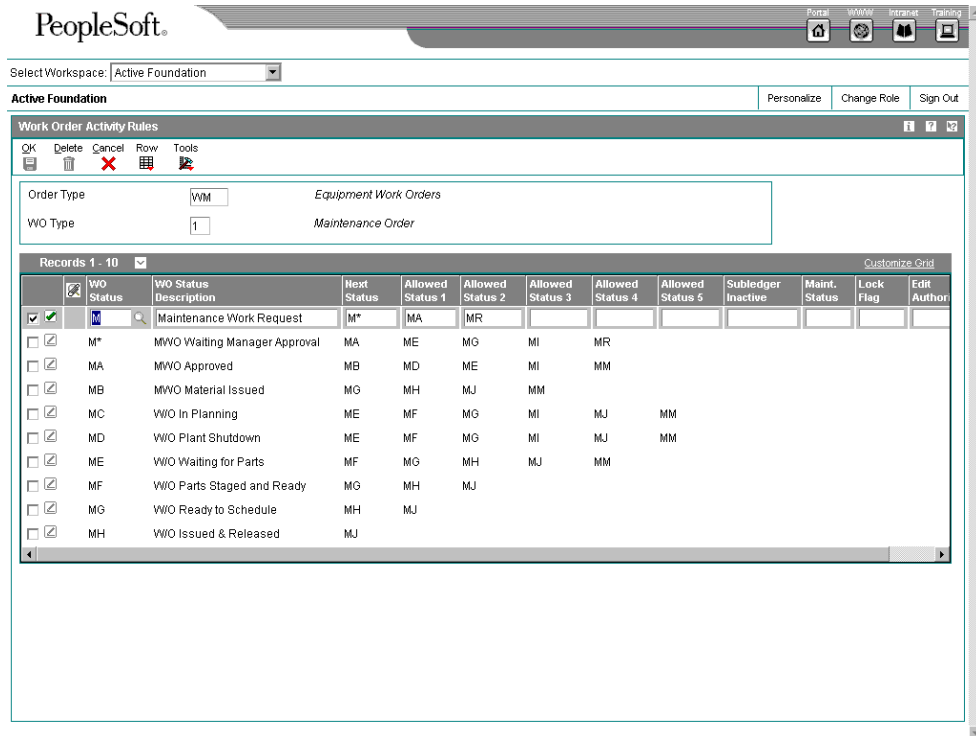
*Use one of the following navigations:*

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

*From the Warranty Claim Setup menu (G1747), choose Work Order Activity Rules.*

*From the Supplier Recovery Setup menu (G1748), choose Work Order Activity Rules.*

1. On Work With Work Order Activity Rules, click Add.



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

This user defined code identifies the document type and indicates how the general ledger processes transactions.
  - WO Type
 

This user defined code classifies work orders, such as maintenance work orders.
3. To define the activity rules for this classification of work orders, complete any of the following fields:
  - WO Status
  - Next Status
  - Allowed Status 1
  - Allowed Status 2
  - Allowed Status 3
  - Allowed Status 4
  - Allowed Status 5

---

**Note**

Each row accounts for a specific rule.

---

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

---

**Caution**

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

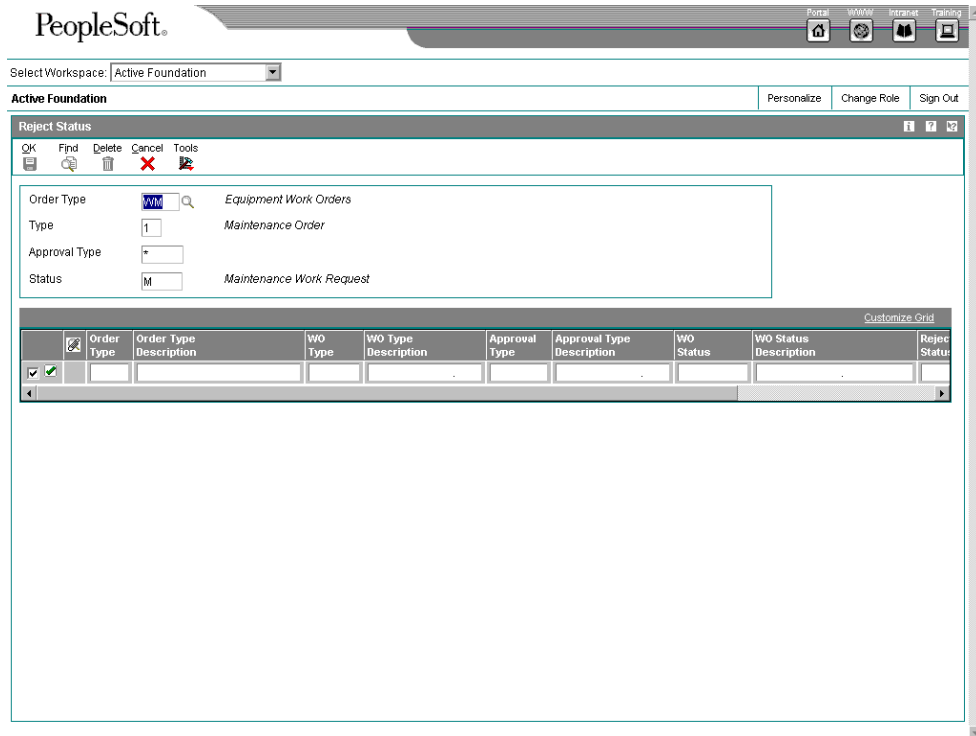
---

4. For each rule that you defined, complete the following field:
    - Edit Authority  
For warranty claims and supplier recovery claims, the value in this field specifies who has the authority to update claims at a certain status.
  5. For each rule that you defined, complete the following optional fields:
    - Subledger Inactive
    - Maint. Status  
Maintenance Status is used only for equipment.
    - Lock Flag
  6. To assign a reject status to a rule, choose the appropriate rule, and then choose Reject Status from the Row menu.
- 

**Note**

Reject status is necessary only if you will use an approval process.

---



7. On Reject Status, complete the following field and click OK:
  - Reject Status
8. Click OK again.
9. On Work Order Activity Rules, click OK.

## Setting Up Approval Routes for Work Orders

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

- Organizational structure
- Work order amount

---

### Note

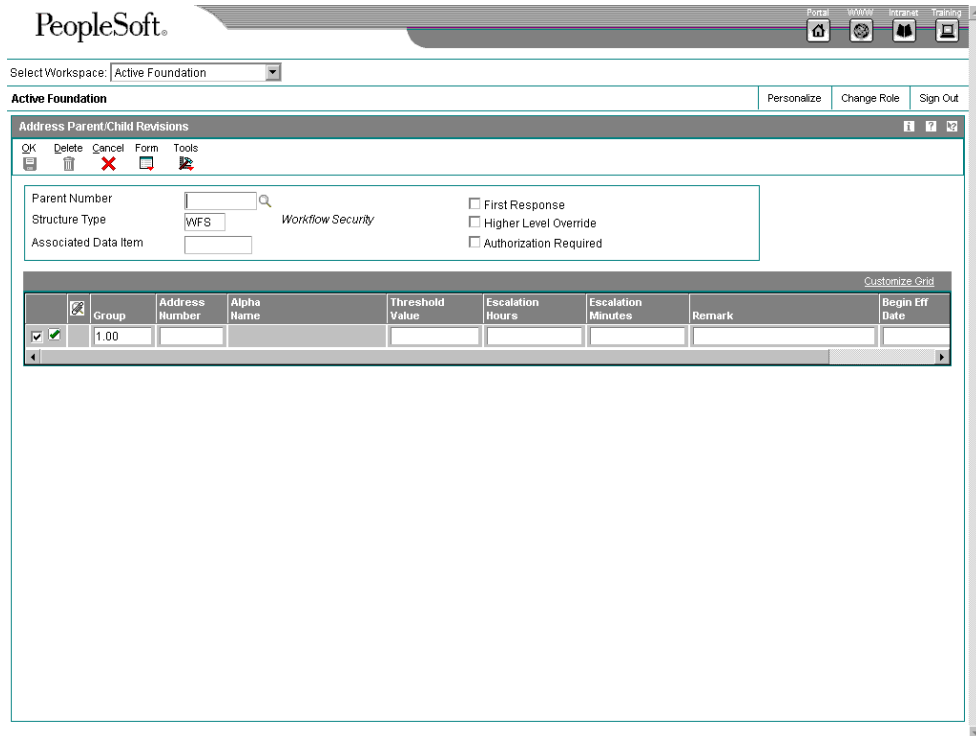
For Enterprise Asset Management, approval routes for work orders are only available with a J.D. Edwards workflow process.

---

### ► To set up approval routes for work orders

---

1. On Work With Distribution Lists, click Add.



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

- Escalation Hours
- Escalation Minutes
- Remark
- Begin Eff Date
- End Eff Date

## Processing Options for Distribution List Control (P02150)

---

### Defaults

1.) Enter the default Structure Type

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

---

## Setting Up User Profiles

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

The system uses the approver's address book number to send electronic mail messages that are associated with work order approvals and to define the work order approval routing.

### ► To set up user profiles

---

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

1. On Work With User Profiles, to locate a user, click Find to select from a list or complete the following field and click Find:
  - User / Role
2. Choose the appropriate user and click Select.
3. On User Profile Revisions, complete any of the following fields, as appropriate:
  - Address Number
  - Menu Identification
  - Language
  - Date Format
  - Date Separator Character
  - Decimal Format Character

- Time Format
4. Click OK.

## Processing Options for User Profile Revisions (P0092)

---

### A/B Validation

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

---

## Setting Up Formats for Record Types

---

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

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

- Setup
- Production
- Teardown and cleanup

When you use the format for text plus three columns, you must specify at least one of the column headings. Formats that are all text do not include headings. If you specify even one column heading for a record type, the system changes the format to text plus three columns. If you change the format of a record type after you assign it to one or more work orders, the system updates the format of that record type for all work orders.

You can review record types, formats, and column headings in either of the following ways:

- From the Project Task Details program (P48014), choose Record Types from the form menu on the Enter Work Orders form
- From the Manufacturing Work Order Processing program (P48013), choose Record Type Review from the Form menu on the Work Order Details form.

---

### Note

You must set up the following record types for Enterprise Asset Management:

- Maintenance Loops
  - Associated PMs
- 

### Before You Begin

- Set up work order record types.

► **To set up formats for record types**

---

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

1. On Work With Record Types, click Add.

The screenshot shows the 'Record Type Revisions' dialog box in the PeopleSoft system. The 'Record Type' is set to 'D' and the title is 'Safety Provisions'. The dialog is divided into three subtitle sections for defining column headings:

Subtitle 1	Subtitle 2	Subtitle 3
Menu	Option	Job To
Name	Number	Execute

2. On Record Type Revisions, complete the following field:
  - Record Type
3. To define text for column headings, complete the following fields, and then click OK:
  - Sub Title 1
  - Sub Title 2
  - Sub Title 3

## Setting Up Supplemental Data for Work Orders

---

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

You set up and maintain supplemental data in work order databases. Work order databases are user defined codes (00/WD). For example, you might set up supplemental data for an engineering change order database. The data types might include detail types, pending

orders, and so on. You can set up your system to validate that the values that you enter on supplemental data forms match the values that you set up in user defined code tables.

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

### Before You Begin

- ❑ Set up a user defined codes table for work order databases for supplemental data.

### ► To set up supplemental data for work orders

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

1. On Work With Supplemental Database Setup, click Find.
2. Choose the appropriate database (such as WO, Work Order) and choose Work With Data Typ from the Row menu.
3. On Work With Data Types, click Add.

The screenshot shows the PeopleSoft 'Data Type Revisions' form. At the top, there is a 'Select Workspace' dropdown set to 'Active Foundation' and a 'Personalize' button. The form title is 'Data Type Revisions'. Below the title are navigation buttons: 'OK', 'Cancel', 'Form', and 'Tools'. The main form area is divided into several sections:

- SDB Code:** A text field containing 'WO'.
- Display Mode:** A dropdown menu set to 'C'.
- Display Sequence:** A text field.
- Type Data:** A text field.
- Data Class:** A text field.
- Search Type:** A text field.
- Description:** A text area.
- UDC Headings/Validation:**
  - UDC:** A text field.
  - Product Code:** A text field.
  - Record Type:** A dropdown menu.
- Remark Headings/Validation:**
  - Remark 1:** A text field.
  - System Code:** A text field.
  - Record Type:** A dropdown menu.
  - Remark 2:** A text field.
  - System Code:** A text field.
  - Record Type:** A dropdown menu.
- Column Headings:**
  - Amount 1:** A text field.
  - Amount 2:** A text field.
  - Quantity:** A text field.
  - Effective From:** A text field.
  - Effective Thru:** A text field.
  - User Date:** A text field.
  - User Days:** A text field.
  - User Address:** A text field.
  - User Document:** A text field.

4. On Data Type Revisions, complete the following fields:
  - Display Mode  
Enter C, O, or N as appropriate.
  - Type Data
5. Complete the following optional fields:

- Display Sequence
  - Data Class
  - Search Type
6. In the UDC Headings/Validation group box, complete the following fields, as needed:
- UDC
  - Product Code
  - Record Type
7. In the Remark Headings/Validation group box, complete the following fields, as needed:
- Remark 1
  - System Code
  - Record Type
  - Remark 2
  - System Code
  - Record Type
8. In the Column Headings group box, complete the following fields, as needed:
- Amount 1
  - Amount 2
  - Quantity
  - Effective From
  - Effective Thru
  - User Date
  - User Days
  - User Address
  - User Document
9. Click OK.

## **Setting Up Accounting Rules for Work Orders**

---

If you apply charges to work orders using the speed entry code on Time Accounting or Payroll forms, you must set up your system to distribute the charges to the proper object

account. You set up these object accounts in the Accounting JE Rules - Labor/Billings/Equipment program (P069043).

At a minimum, you must set up an object account for default company 00000. You can set up object accounts for other companies, as well. The system always searches for accounting rules by a specific company. If it does not find a company, the system applies rules according to the default company.

### **Before You Begin**

- Verify that you have installed at least one of the following systems:
  - Workforce Management Foundation (system 05)
  - Time Accounting (system 05T)
  - Payroll (system 07)
  - Canadian Payroll (system 77)

### **See Also**

- *Setting up AAls for Labor, Billings, and Equipment Distribution in the Time Accounting Guide*

---

## Global Updates

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

---

### Updating the Phase and Equipment Number

---

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

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

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

#### Before You Begin

- ❑ Back up the Work Order Master File table (F4801). See *Backing Up ERP 9.0 Tables* in the *Server and Workstation Administration Guide*.
- ❑ Communicate to the users that no one should access or modify the F4801 table while you run this procedure.

#### See Also

- ❑ *Creating Workflow Processes* in the *Enterprise Workflow Management Guide*

---

### Purging Closed Work Orders

---

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

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

When you run the Work Order Purge program, you use data selection to specify which work orders to purge from the Work Order Master File table (F4801) and the Work Order Instructions File table (F4802). Work orders must have a status of Complete before you can purge them.

---

## Workflow Management for Work Orders

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

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

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

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

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

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### Note

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

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## Workflow Terms and Concepts

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

<b>Routes</b>	Routes define the path along which the Workflow system moves a work order. Depending on your needs, a route can be relatively simple and sequential, or increasingly complex, with joins or splits, parallel routing, iterative routing (such as a loop), and so on.
<b>Process rules</b>	Process rules define what information is to be routed and to whom. For example, you can set up rules that define conditions that a work order must meet before the Workflow Management system advances the order to the next activity in the process, as well as rules that govern who receives an approval request. Workflow Management uses the following process rules:

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

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

**Workflow processes**

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

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

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

**Workflow activities**

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

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

**Primary data structures**

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

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

**Attribute data structures**

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

**See Also**

- *Creating a Workflow Process* in the *JD Edwards Workflow Tools Guide* for information about setting up and activating workflow processes