PeopleSoft

EnterpriseOne 8.10
Work Orders
PeopleBook

May 2004

EnterpriseOne 8.10
Work Orders PeopleBook
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About These EnterpriseOne PeopleBooks Preface

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

This preface discusses:

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

Note

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

EnterpriseOne Application Prerequisites

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

See the *Foundation Guide*.

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

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

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

Obtaining Documentation Updates

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

Note

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions
- Visual cues

Typographical Conventions

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

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

Visual Cues

EnterpriseOne PeopleBooks contain the following visual cues:

- Notes
- Cautions

Notes

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

Note

Example of a note.

Cautions

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

Caution

Example of a caution.

Comments and Suggestions

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

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

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

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

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. It 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.

Industry Information for Work Orders

The term *work order* has numerous meanings and 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 Work Orders 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 Orders system with other systems?

Work order features are available in many of the PeopleSoft EntepriseOne systems, including Shop Floor Management and Capital 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 are required to complete a work order task?

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. You can generate purchase orders directly from the list that is attached to the work order.

The Work Orders 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.

What types of information can I print on work orders?

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.

The Work Order system provides online and printed information that workers can use to help eliminate errors.

How can I reuse past work order information?

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.

Using a parent work order reduces labor costs and provides consistency between similar work orders and tasks.

How do I ensure that an approval process for work orders exists?

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.

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.

How do I control and track the progress of a work order?

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.

Can I associate work orders with a project?

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.

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.

How can I track work orders?

You can track work orders in many ways, such as by:

- Customer number
- Parent work order number
- Project number
- Job or business unit
- Cross-referenced piece of equipment

The Work Order system simplifies management of similar or related orders. The system reduces the amount of time that you spend searching for and tracking work orders.

System Integration

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

In addition to the Job Cost system, you can also link the Work Orders system to other PeopleSoft EnterpriseOne 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 PeopleSoft EnterpriseOne systems:

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

Work Order Management Features

The Work Orders system provides the user with a set of functionality that steeamlines 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:

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

Work Order Tables

Next Numbers (F0002)	Assigns a unique number to each work order that you create.
User Defined Codes (F0005)	Stores valid user defined system codes and descriptions.
Business Unit Master (F0006)	Stores job and business unit information.
Generic Message/Rates (F00191)	Stores general instructions that relate to a work order.
Address Book Master (F0101)	Contains name and address information for the customer, manager, originator, and supervisor.
Account Master (F0901)	Contains the chart of accounts information.
Account Balances (F0902)	Stores balances by account and by work order. It also stores information by ledger type and fiscal year.

Account Ledger (F0911)	Stores amount and unit information for each work order. The work order information is stored as a subledger with a subledger type of W.
Work Order Default Coding File (F48001)	Stores default manager and supervisor codes for work orders by category codes 01 through 03.
Work Order Record Types File (F48002)	Contains the valid work order record types. It stores header information for the Work Order Instruction table.
Work Order Master File (F4801)	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.
Work Order Instructions File (F4802)	Stores description text and the various record types that are defined in the user defined codes, such as Description of Request and Final Disposition. This table contains one record per line of instruction.
W.O. Status Action Table (F4826)	Stores activity rules that relate to a work order.
Work Order Approval Routing (F4827)	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 Enter Work Orders 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 are 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. The system 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

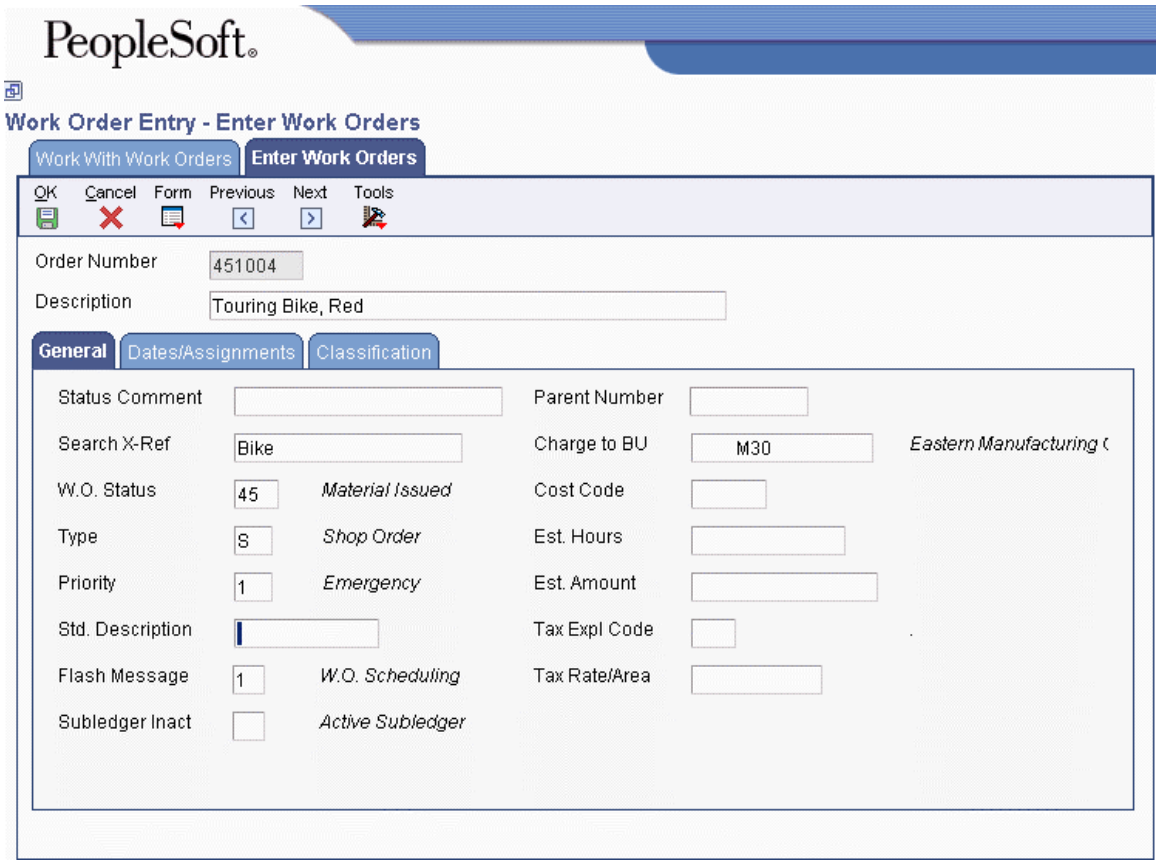
Prerequisite

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

► 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.



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

   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.

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 Capital 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 Capital 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).

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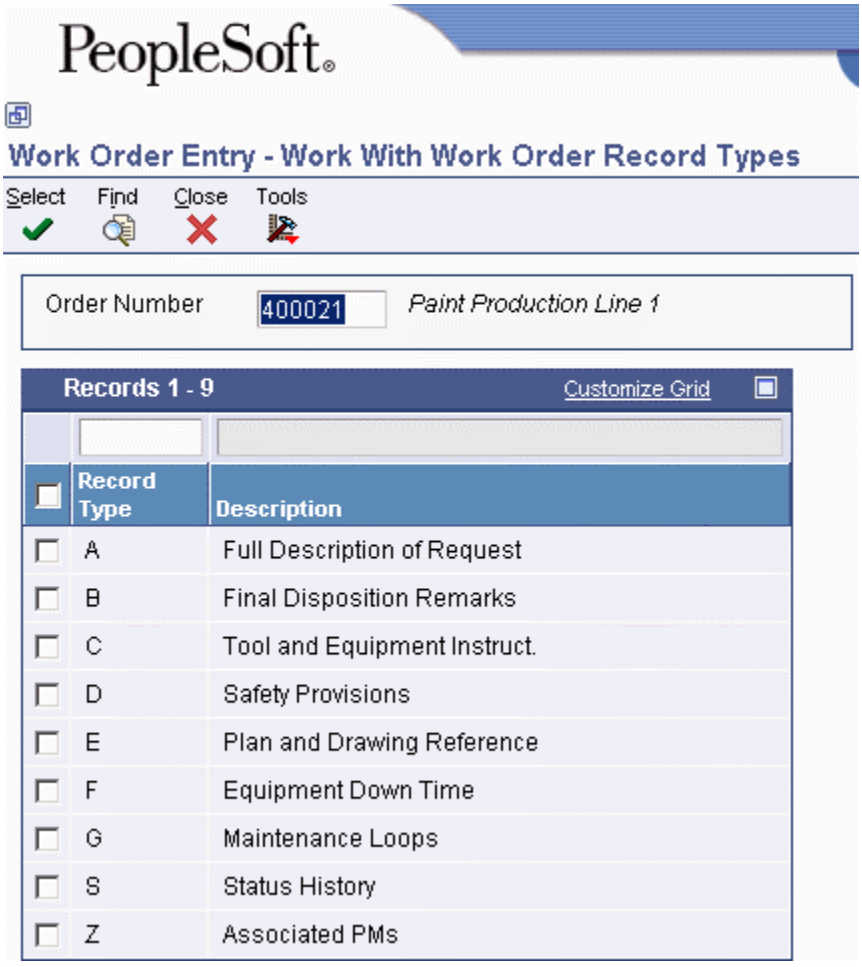
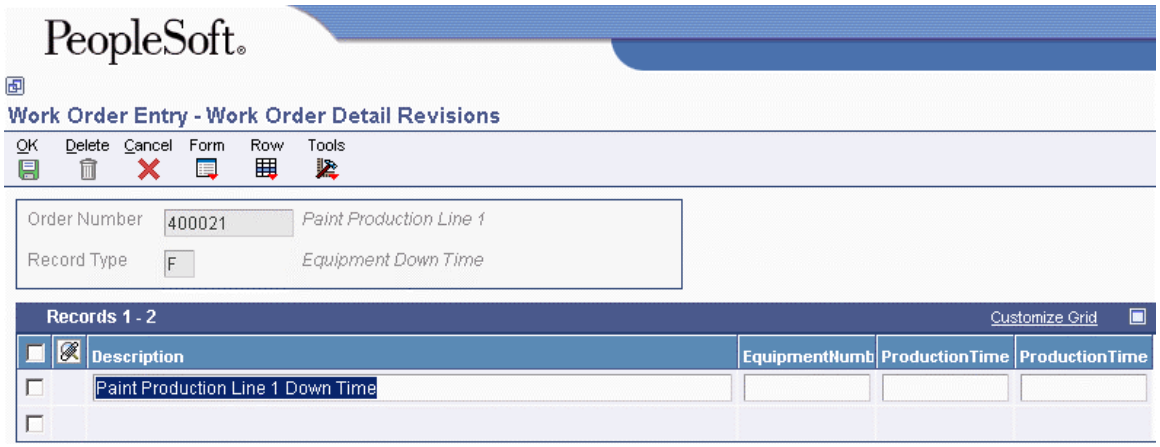
2. Choose a work order, choose Supplemental from the Row menu, and then choose Record Types.



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 Tab

These processing options control default values that are used for some of the filter fields on the Work With Work Orders form.

1. From Status Code W.O.

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

2. Thru Status Code W.O.

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

3. Type - W.O.

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

4. Document Type

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

5. Job or Business Unit

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

6. Models

Blank = Do not include models
1 = Include models

Use this processing option to specify whether the system displays model work orders. Valid values are:

Blank

Do not display model work orders.

1

Display model work orders.

7. Originator

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

8. Customer

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

9. Manager

Use this processing option to specify the manager of the work order that the system uses to

search for work orders.

10. Supervisor

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

Categories Tab

These processing options control which values are used for the category codes.

1. Phase

Use this processing option to specify the current stage or phase of development for work orders that the system uses to search for work orders. Enter a value from UDC 00/W1 (Phase/System Codes).

2. Category Code 02

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W2 (Work Order Category Code 2).

3. Category Code 03

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W3 (Work Order Category Code 3).

4. Category Code 04

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W4 (Work Order Category Code 4).

5. Category Code 05

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W5 (Work Order Category

Code 5).

6. Category Code 06

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W6 (Work Order Category Code 6).

7. Category Code 07

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W7 (Work Order Category Code 7).

8. Category Code 08

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W8 (Work Order Category Code 8).

9. Category Code 09

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W9 (Work Order Category Code 9).

10. Category Code 10

Use this processing option to specify the type or category of work orders that the system uses to search for work orders. Enter a value from UDC 00/W0 (Work Order Category Code 10).

Versions Tab

These processing options control which version the system uses when any of the following programs are called:

1. Work Order Print (R17714) Version

Blank = XJDE0001

Use this processing option to specify the version of the Work Order Print program (R17714) that the system uses when printing work orders. If you leave this processing option blank, the system uses the XJDE0001 version.

2. Equipment Work Order Print (R48425) Version

Blank = XJDE0001

Use this processing option to specify which version of the Maintenance Work Order Report program (R48425) the system uses to print work orders. If you leave this processing option blank, the system uses the XJDE0001 version.

3. Project Work Order Print (R48415) Version

Blank = XJDE0001

Use this processing option to specify the version of the Work Order Print program (R48415) to use when printing project work orders. If you leave this processing option blank, the system uses the XJDE0001 version.

4. Tenant Work Order Print (R15448) Version

Blank = XJDE0001

Use this processing option to specify the version of the Tenant Work Order Print program (R15448) that the system uses when printing tenant work orders. If you leave this processing option blank, the system uses the XJDE0001 version.

5. Completed PM (P12071) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Preventive Maintenance Backlog program (P12071) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

6. Parts Detail (P17730) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Work Order Parts Detail program (P17730) that the system uses. If you leave this processing option blank, the system uses

the ZJDE0001 version.

7. Labor Detail (P17732) Version

Blank = ZJDE0001

Use this processing option to specify the version that the system uses for the Work Order Labor Detail program (P17732). If you leave this processing option blank, the system uses the ZJDE0001 version.

8. Inventory Issues (P31113) Version

Blank = ZJDE0002

Use this processing option to specify the version of the Work Order Inventory Issues program (P31113) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

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

Blank = ZJDE0001

Use this processing option to specify the version of the Work Order Time Entry program (P311221) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

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

Blank = ZJDE0001

Use this processing option to specify the version of the Work With Return Material Authorization program (P40051) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

11. Open Purchase Order (P4310) Version

Blank = ZJDE0011

Use this processing option to specify the version of the Purchase Orders program (P4310) that the system uses. If you leave this processing option blank, the system uses the ZJDE0011 version.

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

Blank = ZJDE0001

Use this processing option to specify the version of the Return Material Authorization Revisions program (P400511) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

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

Blank = ZJDE0001

Use this processing option to specify the version of the On Line Work Order Quote Inquiry program (P17717) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

14. Time Entry By Employee (P051121) Version

Blank = ZJDE0001

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

15. Work with Failure Analysis (P17766) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Work with Failure Analysis program (P17766) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

16. Failure Analysis (P17767) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Failure Analysis program (P17767) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

17. Supplier Recovery Generation (R1776) Version

Blank = XJDE0001

Use this processing option to specify the version of the Create Supplier Recovery Claims program (R1776) that you want to use to generate a supplier recovery claim from a work

order. If you leave this processing option blank, the system uses the XJDE0001 version.

18. Status History (P1307) Version

Blank = ZJDE0001

Use this processing option to specify which version the system uses for the Status History program (P1307). If you leave this processing option blank, the system uses the ZJDE0001 version.

19. Work with Equipment Work Orders (P13220) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Work with Equipment Work Orders program (P13220) that you want to use. If you leave this processing option blank, the system uses the XJDE0001 version.

20. Work Order Cost (P48211) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Work Order Cost program (P48211) that you want to use when you review the cost of an order. If you leave this processing option blank, the system uses the XJDE0001 version.

21. Resource Assignment (P48331) Version

Blank = ZJDE0001

Use this processing option to specify the version that the system uses for the Resource Assignment program (P48331). If you leave this processing option blank, the system uses the ZJDE0001 version.

22. Quick Customer/Contact Add (P01015) Version

Blank = ZJDE0001

Use this processing option to specify the version of the Quick Customer/Contact Add

program (P01015) that you want to use. If you leave this processing option blank, the system uses the ZJDE0001 version.

23. Equipment Search/Select (P17012S) Version

Blank = ZJDE0001

Use this processing option to specify the version to use for the Equipment Search/Select application (P17012S). If this processing option is left blank, version ZJDE0001 is used.

WO Entry Tab

These processing options control which work order entry program and version that the system calls from the Work With Work Orders program.

1. Work Order Entry Program

1 = Work Orders (P17714)
2 = Project Task Details (P48014)
3 = Tenant Work Orders (P15248)

Use this processing option to specify which program the system uses for work order entry and printing when you create or choose a work order. Valid values are:

1

Work Order Revisions (P17714)

2

Project Task Details (P48014)

3

Tenant Work Order Entry (P15248)

2. Work Order Entry Version

Blank = ZJDE0001

Use this processing option to specify the version for the selected work order entry

program. If you leave this processing option blank, the system uses the ZJDE0001 version.

Process Tab

These processing options control whether the Priority Code field is highlighted and whether self-service functionality is used.

1. Priority

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

Use this processing option to specify whether the system applies a contrasting color to the Priority field within the detail area. Valid values are:

Blank

Do not apply a contrasting color to the Priority field.

1

Apply a contrasting color to the Priority field.

Note: Colors for the Priority field are hard-coded by the special handling field in UDC 00/PR (Work Order Priority).

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.

Use this processing option to specify whether the system activates customer self-service functionality. Valid values are:

Blank

Do not activate customer self-service functionality.

1

Activate customer self-service functionality for Java and HTML.

2

Activate customer self-service functionality for 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.

Prerequisite

- ❑ 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.

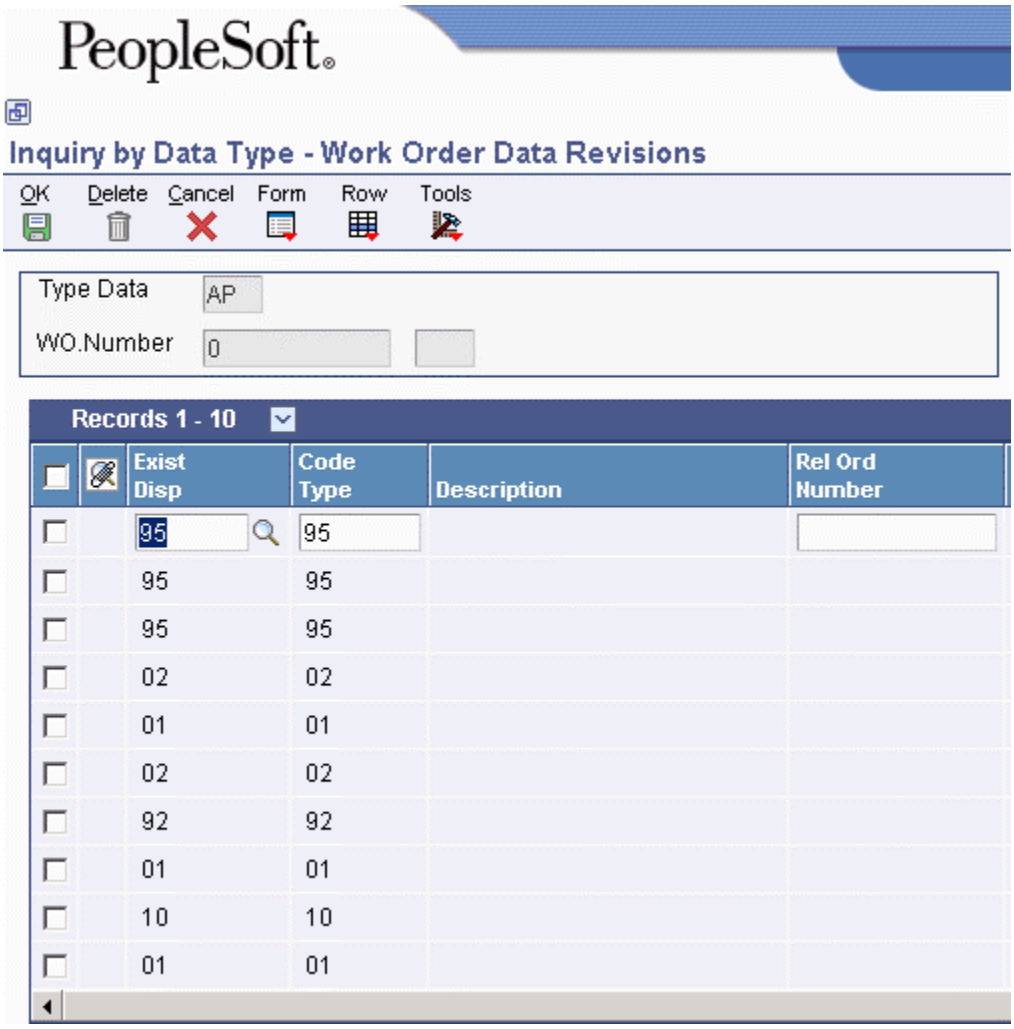
Processing Options for Supplemental Data (P00092)

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)

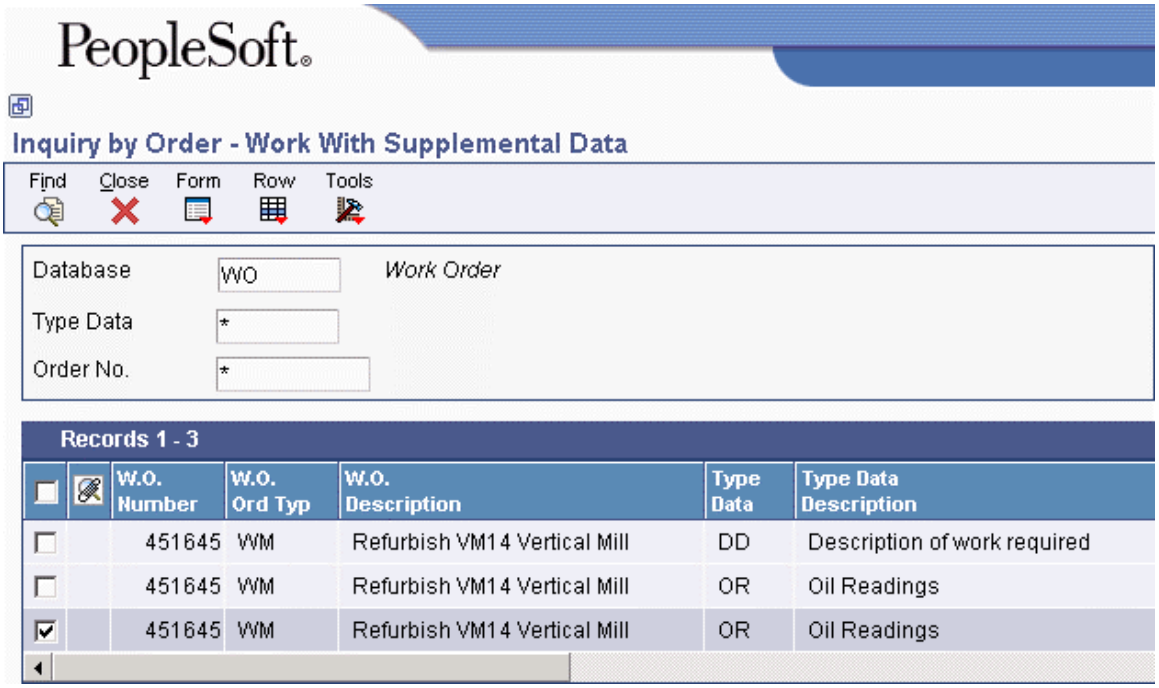
Display option
1. Enter the Work Order Data Base. Only Data Types with this Data Base can be displayed on the screen. Leave blank to default Data Base "E" (Engineering Change Orders).
2. Enter the Date Type within the Data Base above to default on the screen. If left blank, no Data Type will be defaultded.

► 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.

Prerequisite

- 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

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

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:
   - Customer 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.

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)

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

Work Order Processing

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

- Approve a work order and allow work to begin.
- Update the life cycle information for the work order to indicate the progress of the work. For example, 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

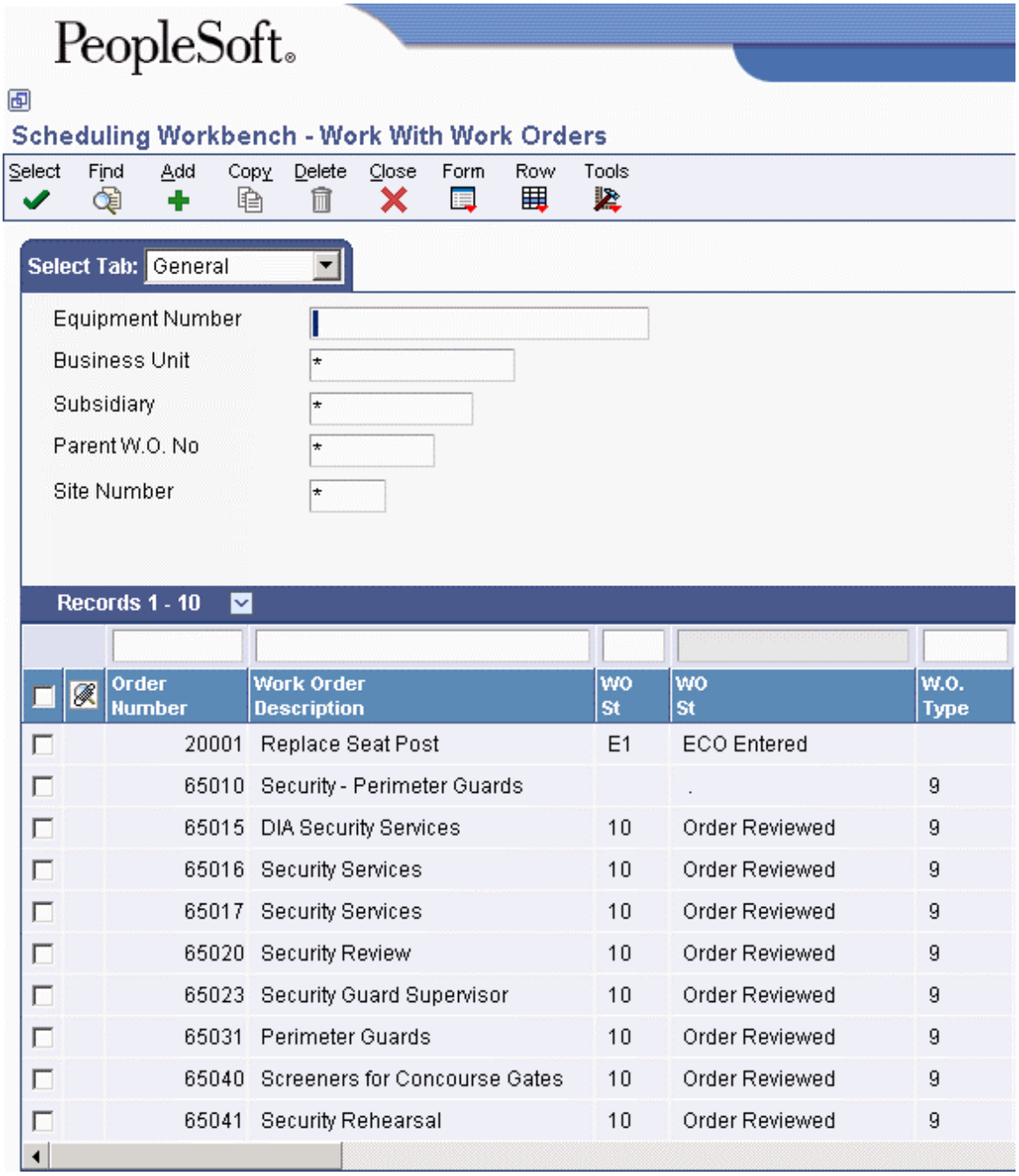
You must have the Capital Asset Management system in addition to the Work Orders system to access the following programs from the Scheduling Workbench program (P48201):

- Work With Unscheduled Maintenance (P13UM)
- Work With Equipment Work Orders (P13220)
- Capacity Message Summary (P3301)
- PM 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 the Purchase Orders program (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).

Prerequisites

- 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 Capital 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 information about a work order record type, 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 PeopleSoft EnterpriseOne 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 and Labor 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 PeopleSoft EnterpriseOne system that creates general ledger transaction records with subledgers. Following are some guidelines.

Time and Labor; 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 and Labor, you need to enter the menu number (G05BT1) in the fast path. 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 and Labor

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

Example: \1919.

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

- Human Capital 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
   - Subledger
   - Sub Type
3. Click OK.

See Also

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

Processing Options for Speed Voucher Entry (P0411SV)

Payments Tab

1. Manual Payment Creation

Blank = No manual payments created.
1 = Generate manual payments (without voucher match)

Use this processing option to specify whether to automatically generate manual payments. This option applies only to manual payments without voucher match and is not available in multicompany and multivoucher modes. Valid values are:

Blank

Do not create manual payments.

1

Generate manual payments (without voucher match).

Note: If you enter 1, complete the Speed Voucher Entry form and click OK, then complete the Payment Information form for manual payment processing.

2. Automatic Payment Number Assignment

Blank = Payment number manually assigned.
1 = Payment number automatically assigned.

Use this processing option to specify whether the payment number is automatically assigned based on the bank account's next number. Valid values are:

Blank

The payment number is manually assigned.

1

The payment number is automatically assigned.

Versions Tab

1. Voucher Master Business Function Version

Blank (default) = ZJDE0001

Use this processing option to specify the version of the Voucher Entry MBF Processing Options program (P0400047) to use for Speed Voucher Entry processing. If you leave this processing option blank, version ZJDE0001 is used.

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).

► To review charges by work order

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)

Defaults

This processing option controls the ledger type that the system uses for selecting records from the Account Ledger table (F0911).

---

1. Ledger Type

Use this processing option to specify the ledger type the system uses when selecting records from the Account Ledger table (F0911). Enter a value from UDC table 09/LT (Ledger Type). If you leave this processing option blank, the system selects records from all ledger types.

Versions

These processing options specify which version the system uses when it calls any of these programs.

---

1. Work Order Backlog (P48201) Version

Blank = ZJDE0001

Use this processing option to specify the version that the system uses for the Work With Work Orders program (P48201). If you leave this processing option blank, the system uses the ZJDE0001 version.

2. Inventory Issues (P31113) Version

Blank = ZJDE0001

Use this processing option to specify the version that the system uses for the Work Order Inventory Issues program (P31113). If you leave this processing option blank, the system uses the ZJDE0001 version.

3. Time Entry (P051121) Version

Blank = ZJDE0001

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

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

Print the Print WO Cost Detail report (R48498) 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 the following information:

- Actual hours and amounts charged to each work order
- The general ledger 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:

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

For the Capital Asset Management system, choose Print WO Status Summary from the Work Order menu (G1316).

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

- 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 retrieves 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 Work with Work Orders 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.

When displaying work orders using the Work with Work Orders (P48201) program, the Priority processing option on the Process tab controls whether the program highlights the Priority field in a specific color. The color is hard-coded in the Special Handling field of UDC 00/PR, as follows:

- A value of 1highlights the Priority field in red.
- A value of 2 highlights the Priority field in yellow.
- A value of 3 highlights the Priority field in blue.

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

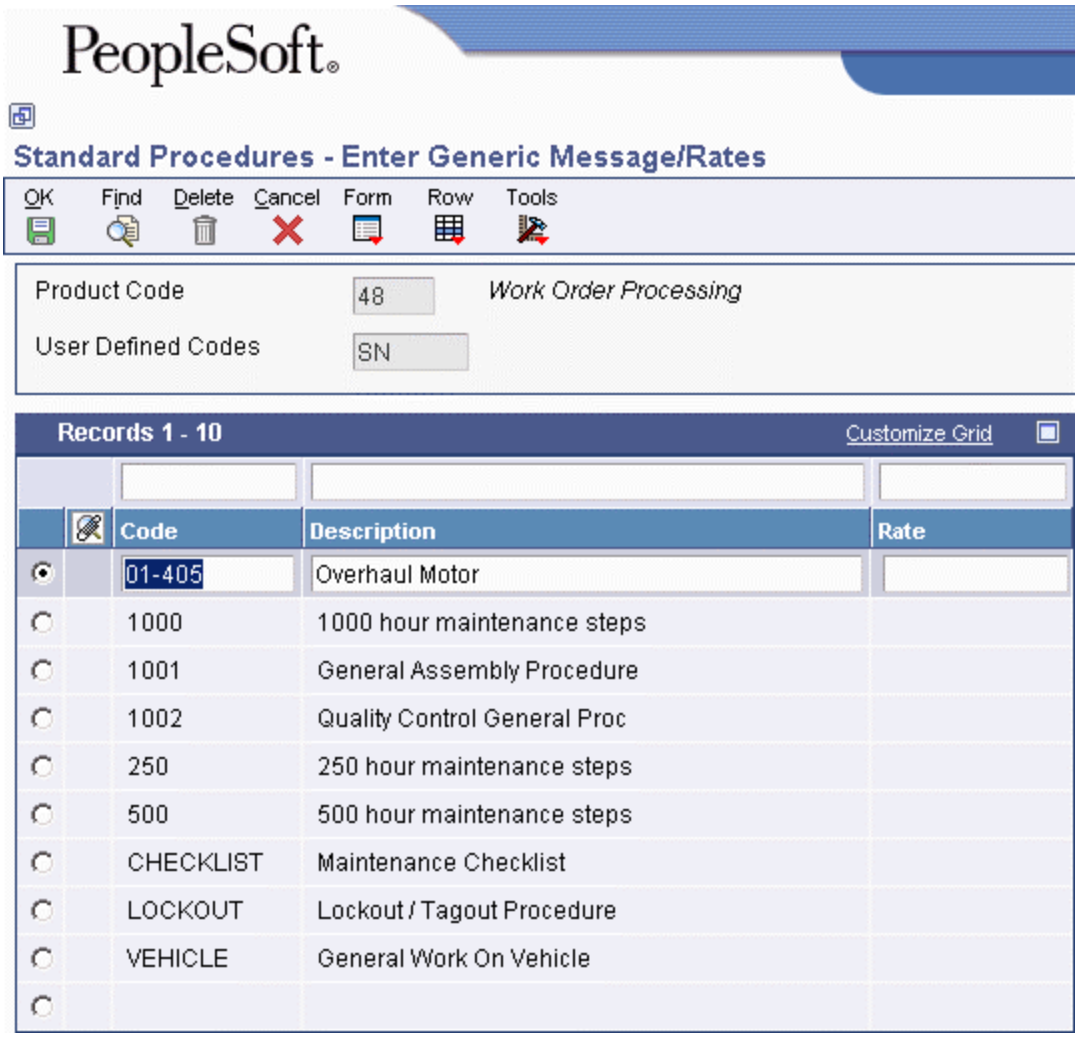
Use one of the following navigations:

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 10.
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 Enter Work Orders form. 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.

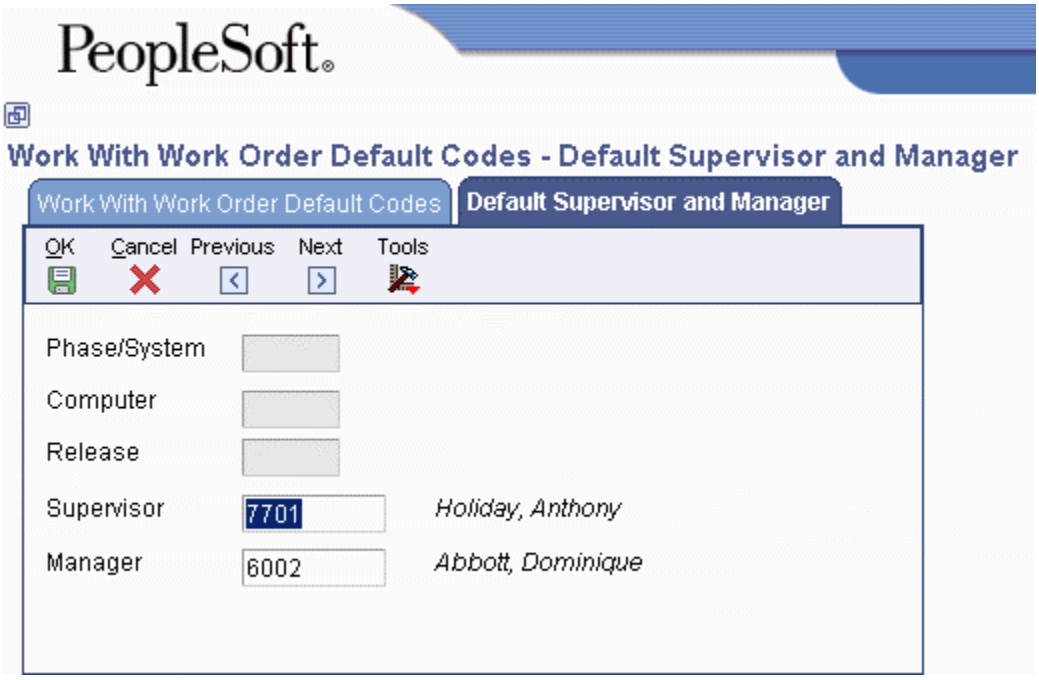
Prerequisite

- 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.
- Specify who has the authority to update claims at a certain status (for warranty claims and supplier recovery claims).

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.

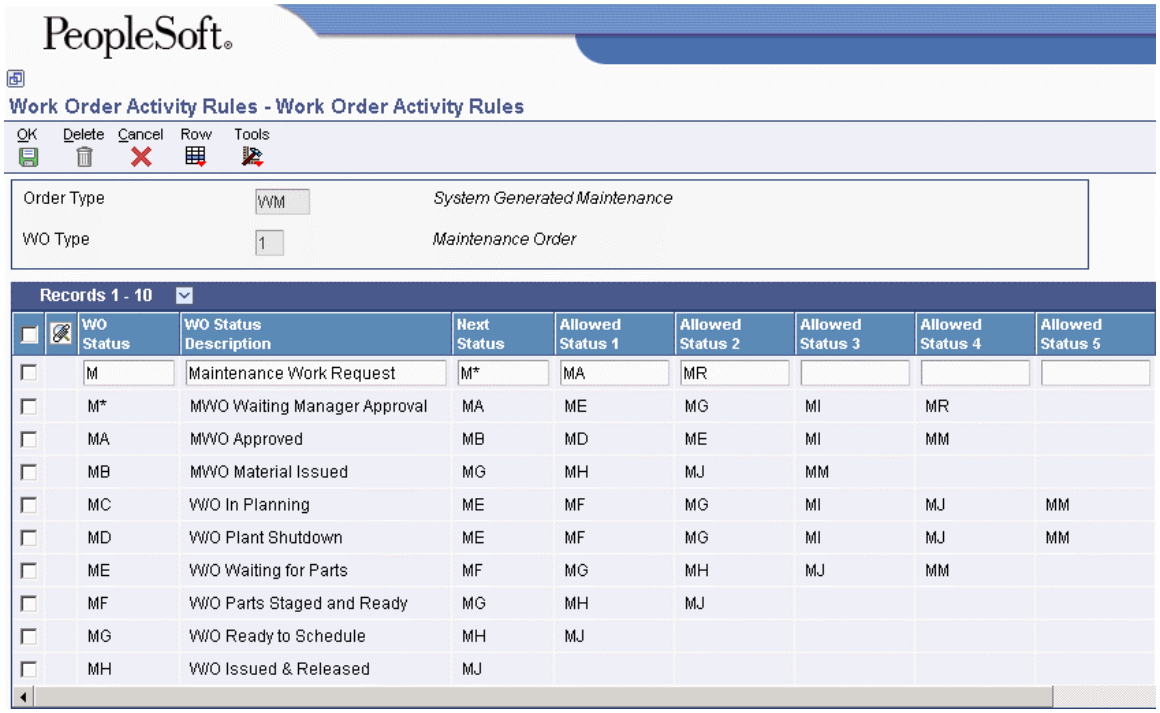
► To set up activity rules for work orders

Use one of the following navigations:

For the Work Orders system, choose Work Order Activity Rules from the Work Order Setup menu (G4841).

For the Service Management system, choose Work Order Activity Rules from the Warranty Claim Setup menu (G1747) or from the Supplier Recovery Setup menu (G1748).

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 for each activity rule that you need to define:

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

Note

Each record 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 that have a certain status.

5. For each rule that you defined, complete any of the following optional fields:

   - Subledger Inactive
   - Maint. Status

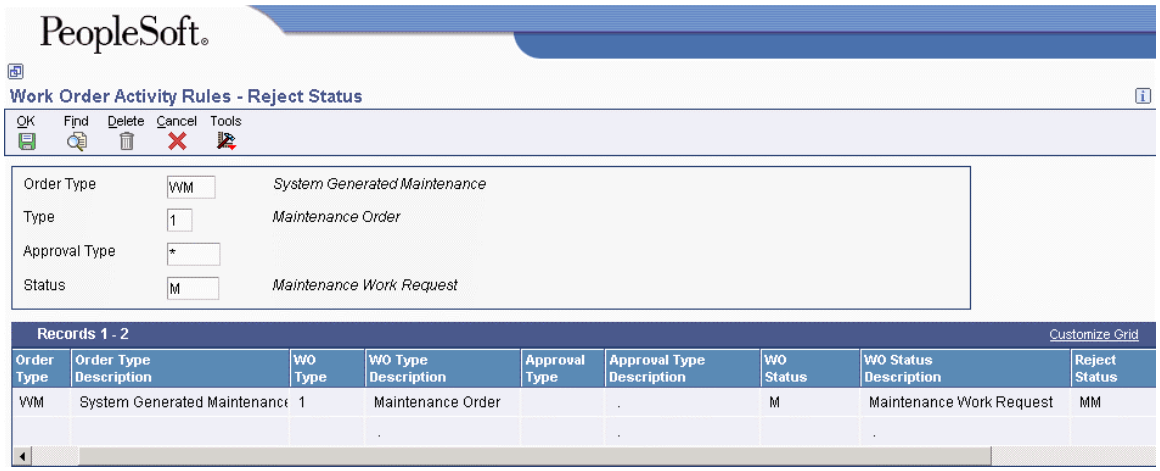
     Maintenance Status is used only for equipment.

   - 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 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

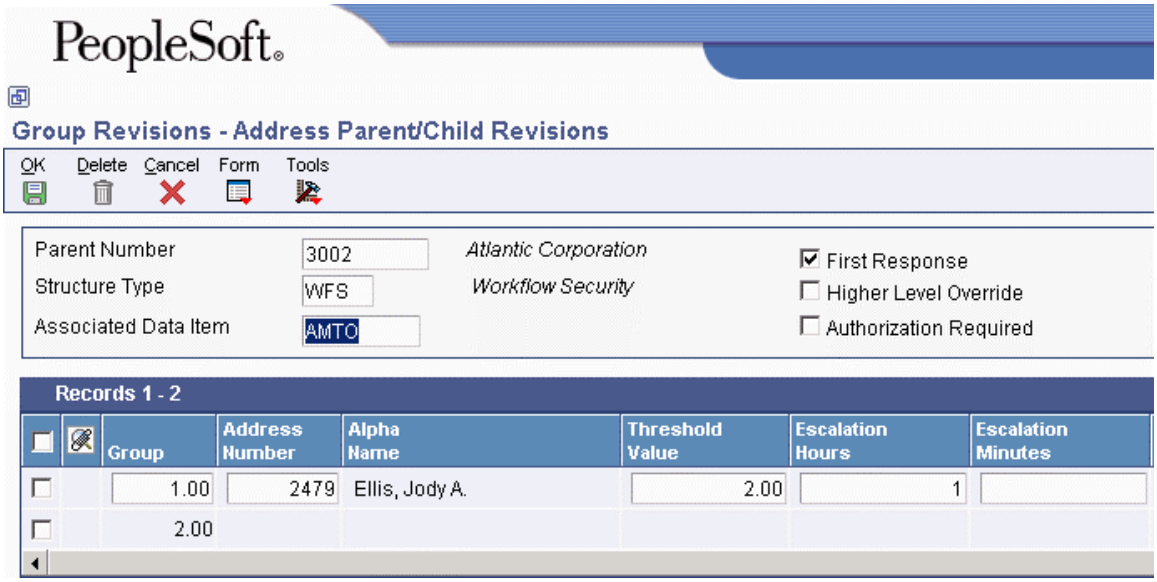
Note

For Capital Asset Management, approval routes for work orders are available only with a PeopleSoft EnterpriseOne workflow process.

► To set up approval routes for work orders

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

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 Type from the Form menu on the Enter Work Orders form
- From the Enter/Change Order 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 Capital Asset Management:

- Maintenance Loops
- Associated PMs

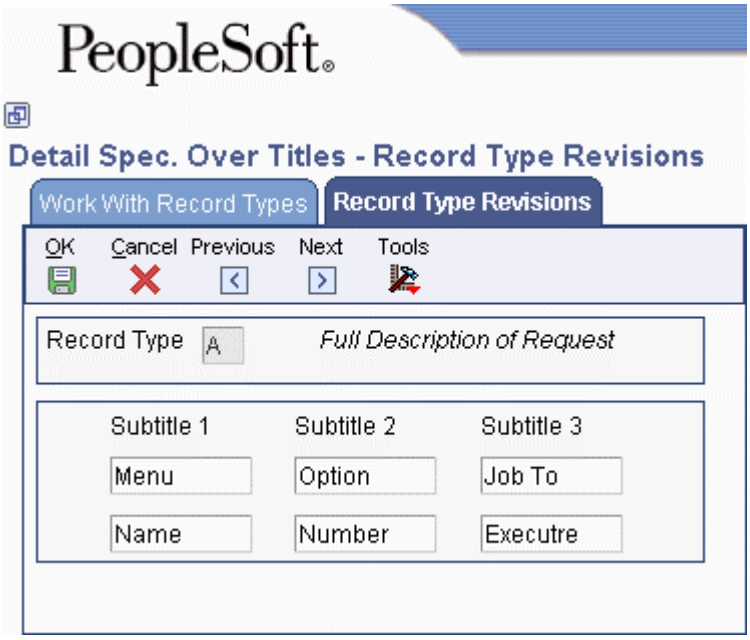
Prerequisite

- ❑ 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.



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. It is recommended 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.

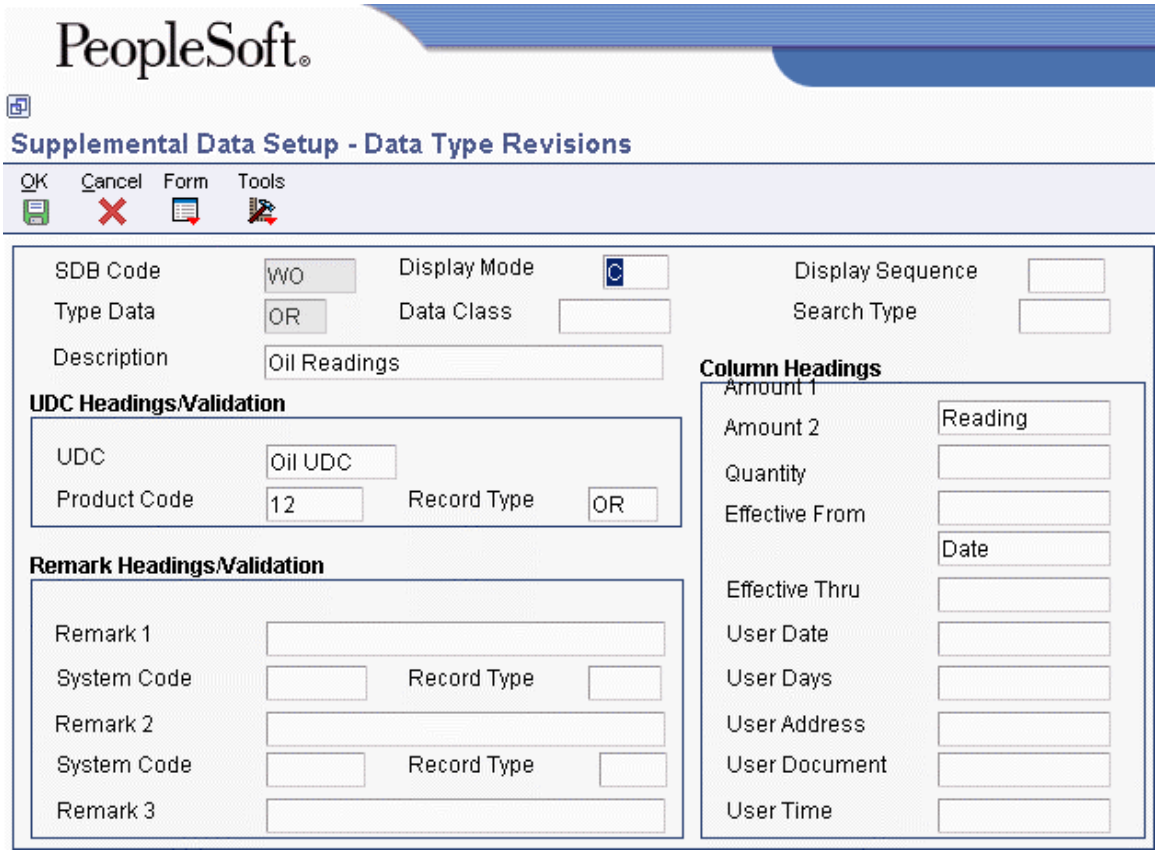
Prerequisite

- 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.



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.

Prerequisite

- 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 AAIs for Labor, Billings, and Equipment Distribution* in the *Time and Labor 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.

Prerequisite

- Back up the Work Order Master File table (F4801). Communicate to the users that no one should access or modify the F4801 table while you run this procedure.

Purging Closed Work Orders

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

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

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 Processes for Work Orders

Workflow processes offer 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 a workflow process to do any of 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, the system 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. The Work Orders system includes 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.

Note

For any given setup task, demonstration data is provided. You can use the available data or customize it to meet your needs.

Workflow Terms and Concepts

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

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.

Routes

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

Process rules

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

To avoid system errors, do not use multiple data items within a data structure.

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 *EnterpriseOne Workflow Tools Guide* for information about setting up and activating workflow processes

EnterpriseOne PeopleBooks Glossary

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

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

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

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

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

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

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

control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
cost assignment	Allocating resources to activities or cost objects.
cost component	An element of an item's cost—for example, material, labor, or overhead.
cost object	Any customer, product, service, contract, project, or other work unit for which you need a separate cost measurement.
cost rollup	A simulated scenario in which work center rates, material costs, and labor costs are used to determine the total cost of an item.
costing elements	The individual classes of added value or conversion costs. These elements are typically materials, such as raw and packaging; labor and machine costs; and overhead, such as fixed and variable. Each corporation defines the necessary detail of product costs by defining and tracking cost categories and subcategories.
credit memo	A negative amount that is used to correct a customer's statement when he or she is overcharged.
credit notice	The physical document that is used to communicate the circumstances and value of a credit order.
credit order	A credit order is used to reflect products or equipment that is received or returned so that it can be viewed as a sales order with negative amounts. Credit orders usually add the product back into inventory. This process is linked with delivery confirmation.
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
crude oil assay	A procedure for determining the distillation curve and quality characteristics of a crude oil.
cumulative update	A version of software that includes fixes and enhancements that have been made since the last release or update.
currency relationships	When converting amounts from one currency to another, the currency relationship defines the from currency and the to currency in PeopleSoft software. For example, to convert amounts from German marks to the euro, you first define a currency relationship between those two currencies.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. It can be used, for example, when many currencies must be restated into a single currency for consolidated reporting.

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

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

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

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

environment workbench	During the Installation Workbench process, Environment Workbench copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System release number data source. It also updates the Environment Plan detail record to reflect completion.
equivalent fuel	A barrel of equivalent fuel supplies six million BTUs of heat. Fuel gas quantities are usually calculated as equivalent fuel barrels in economic calculations for refinery operations.
escalation monitor	A batch process that monitors pending requests or activities, and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.
ESR	Einzahlungsschein mit Referenznummer. A pay slip with a reference number.
event rule	[In EnterpriseOne] A logic statement that instructs the system to perform one or more operations that are based on an activity that can occur in a specific application, such as entering a form or exiting a field.
exit bar	[In EnterpriseOne] The tall pane with icons in the left portion of many EnterpriseOne program windows.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit.
fast path	[In EnterpriseOne] A command prompt that allows the user to move quickly among menus and applications by using specific commands.
file handle	A temporary reference (typically a number) that is assigned to a file which has been opened by the operating system and is used throughout the session to access the file.
file server	A computer that stores files to be accessed by other computers on the network.
find/browse	A type of form used to: Search, view, and select multiple records in a detail area. Delete records. Exit to another form. Serve as an entry point for most applications.
firm planned order (FPO)	A work order that has reached a user defined status. When this status is entered in the processing options for the various manufacturing programs, messages for those orders are not exploded to the components.
fiscal date pattern	A representation of the beginning date for the fiscal year and the ending date for each period in that year.
fix/inspect	A type of form used to view, add, or modify existing records. A fix/inspect form has no detail area.

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

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

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

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

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

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

maintenance work order	In PeopleSoft EnterpriseOne systems, a term that is used to distinguish work orders created for the performance of equipment and plant maintenance from other work orders, such as manufacturing work orders, utility work orders, and engineering change orders.
manufacturing and distribution planning	Planning that includes resource and capacity planning, and material planning operations. Resource and capacity planning allows you to prepare a feasible production schedule that reflects your demand forecasts and production capability. Material Planning Operations provides a short-range plan to cover material requirements that are needed to make a product.
mapping	A set of instructions that describes how one data structure passes data to another.
master business function	An interactive master file that serves as a central location for adding, changing, and updating information in a database.
master business function	A central system location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. Master business functions ensure uniform processing according to guidelines that you establish.
master table	A database table that is used to store data and information that is permanent and necessary to the system's operation. Master tables might contain data such as paid tax amounts, supplier names, addresses, employee information, and job information.
matching document	A document that is associated with an original document to complete or change a transaction. For example, a receipt is the matching document of an invoice.
media object	An electronic or digital representation of an object.
media storage objects	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
memory violation	An error that occurs as the result of a memory leak.
menu selection	An option on a menu that initiates a software function directly.
message center	A central location for sending and receiving all EnterpriseOne messages (system- and user-generated), regardless of the originating application or user.
messaging application programming interface (MAPI)	An architecture that defines the components of a messaging system and how they behave. It also defines the interface between the messaging system and the components.
metal content	A series of properties of a blended product that help to determine its suitability for a prescribed purpose.
metals management	The process of maintaining information about the location and status of durable product containers such as liquid petroleum gas (LPG) cylinders.
mobile inventory	Inventory that is transferred from a depot to a barge or truck for milk-run deliveries.

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

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

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

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

parent/child relationship	See parent/component relationship.
parent/component relationship	1. In Capital Asset Management, the hierarchical relationship of a parent piece of equipment to its components. For example, a manufacturing line could be a parent and the machinery on the line could be components of the line. In addition, each piece of machinery could be a parent of still more components. 2. In Product Data Management, a hierarchical relationship of the components and subassemblies of a parent item to that parent item. For example, an automobile is a parent item; its components and subassemblies include: engine, frame, seats, and windows. Sometimes referred to as parent/child relationship.
partita IVA	In Italy, a company fiscal identification number.
pass-through	A process where data is accepted from a source and forwarded directly to a target without the system or application performing any data conversion, validation, and so on.
pay on consumption	The method of postponing financial liability for component materials until you issue that material to its consuming work order or rate schedule.
payment group	A system-generated group of payments with similar information, such as a bank account. The system processes all of the payments in a payment group at the same time.
PeopleSoft database	See JDEBASE Database Middleware.
performance tuning	The adjustments that are made for a more efficient, reliable, and fast program.
persistent object	An object that continues to exist and retains its data beyond the duration of the process that creates it.
pervasive device	A type of intelligent and portable device that provides a user with the ability to receive and gather information anytime, from anywhere.
planning family	A means of grouping end items that have similarity of design or manufacture.
plug-in	A small program that plugs into a larger application to provide added functionality or enhance the main application.
polymorphism	A principle of object-oriented technology in which a single mnemonic name can be used to perform similar operations on software objects of different types.
portal	A Web site or service that is a starting point and frequent gateway to a broad array of on-line resources and services.
Postfinance	A subsidiary of the Swiss postal service. Postfinance provides some banking services.

potency	Identifies the percent of an item in a given solution. For example, you can use an 80% potent solution in a work order that calls for 100% potent solution, but you would use 25% more, in terms of quantity, to meet the requirement (100 / 80 = 1.25).
preference profile	The ability to define default values for specified fields for a user defined hierarchy of items, item groups, customers, and customer groups. In Quality Management setup, this method links test and specification testing criteria to specific items, item groups, customers, or customer groups.
preflush	A work order inventory technique in which you deduct (relieve) materials from inventory when the parts list is attached to the work order or rate schedule.
preventive maintenance cycle	The sequence of events that make up a preventive maintenance task, from its definition to its completion. Because most preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.
preventive maintenance schedule	The combination of service types that apply to a specific piece of equipment, as well as the intervals at which each service type is scheduled to be performed.
primary service type	A service type to which you can link related service types. For example, for a particular piece of equipment, you might set up a primary service type for a 1000-hour inspection and a linked service type for a 500-hour inspection. The 1000-hour inspection includes all of the tasks performed at 500 hours. When a primary service type is scheduled to be performed, the system schedules the linked service type. See also linked service type.
pristine environment	An EnterpriseOne environment that is used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so you can compare pristine objects that you modify.
processing option	A data structure that allows users to supply parameters that regulate the execution of a batch program or report.
product data management (PDM)	In PeopleSoft EnterpriseOne software, the system that enables a business to organize and maintain information about each item which it manufactures. Features of this system, such as bills of material, work centers, and routings, define the relationships among parents and components, and how they can be combined to manufacture an item. PDM also provides data for other manufacturing systems including Manufacturing Accounting, Shop Floor Management, and Manufacturing and Distribution Planning.
product line	A group of products with similarity in manufacturing procedures, marketing characteristics, or specifications that allow them to be aggregated for planning; marketing; and, occasionally, costing.
product/process definition	A combination of bill of material (recipe, formula, or both) and routing (process list). Organized into tasks with a statement of required consumed resources and produced resources.
production environment	An EnterpriseOne environment in which users operate EnterpriseOne software.

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

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

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

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

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

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

threshold percentage	In Capital Asset Management, the percentage of a service interval that you define as the trigger for maintenance to be scheduled. For example, you might set up a service type to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.
throughput agreement	A service agreement in which a business partner agrees to store and manage product for another business partner for a specified time period. The second partner actually owns the stock that is stored in the first partner's depot, although the first partner monitors the stock level; suggests replenishments; and unloads, stores, and delivers product to the partner or its customers. The first partner charges a fee for storing and managing the product.
throughput reconciliation	Reconcile confirmed sales figures in a given period with the measured throughput, based on the meter readings. This process is designed to catch discrepancies that are due to transactions not being entered, theft, faulty meters, or some combination of these factors. This reconciliation is the first stage. See also operational reconciliation.
token	[In Object Management Workbench] A flag that is associated with each object which indicates whether you can check out the object.
tolerance range	The amount by which the taxes that you enter manually can vary from the tax that is calculated by the system.
TP monitor	Transaction Processing monitor. A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and can include programs that validate data and format terminal screens.
tracing	The act of researching a lot by going backward, to discover its origin.
tracking	The act of researching a lot by going forward, to discover where it is used.
transaction set	An electronic business transaction (EDI Standard document) composed of segments.
transclude	To include the external data in the displayed content through a linking mechanism.
transfer order	An order that is used to ship inventory between branch/plants within your company and to maintain an accurate on-hand inventory amount. An interbranch transfer order creates a purchase order for the shipping location and a sales order for the receiving location.
translation adjustment account	An optional G/L account used in currency balance restatement to record the total adjustments at a company level.
translator software	The software that converts data from an application table format to an EDI Standard Format, and from EDI Standard Format to application table format. The data is exchanged in an EDI Standard, such as ANSI ASC X12, EDIFACT, UCS, or WINS.

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

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

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

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