

PeopleSoft®

PeopleSoft EnterpriseOne Change Management 8.11 PeopleBook

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element 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. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

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

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

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'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! 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, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

Address Book Number

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are: <i>Blank:</i> Batch is unposted and pending approval. <i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted. <i>D:</i> The batch posted successfully. <i>E:</i> The batch is in error. You must correct the batch before it can post. <i>P:</i> The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E. <i>U:</i> The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.
Branch/Plant	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
Category Code	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
Company	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
Currency Code	Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
Document Company	Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document. If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and Fiscal Year

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

PeopleSoft EnterpriseOne Change Management Preface

This preface discusses:

- PeopleSoft products
- PeopleSoft application fundamentals
- Common elements used in this PeopleBook

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft EnterpriseOne General Accounting
- PeopleSoft EnterpriseOne Job Cost
- PeopleSoft EnterpriseOne Contract Billing
- PeopleSoft EnterpriseOne Subcontract Management

Note. This PeopleBook documents only form elements that require additional explanation. If a form element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

PeopleSoft Application Fundamentals

The *PeopleSoft EnterpriseOne Change Management PeopleBook* provides you with implementation and processing information for your PeopleSoft change management solution. However, additional, essential information describing the setup and design of the system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft EnterpriseOne products lines. The companion volume for Change Management is:

PeopleSoft EnterpriseOne Financial Management Solutions 8.11 Application Fundamentals PeopleBook.

See Also

PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook

Common Elements Used in This PeopleBook

Approved Date

Enter the date on which the person with the appropriate authority approves a requisition.

Contract Number	Enter a number that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on. This field is optional.
Contract Type	Enter a user-defined code (00/DT) that is associated with a contract in the Subcontract Management system. This field, along with the contract number and the contract company, links the change request to the Subcontract Management system.
Cost Final	Enter the final amount for a detail item for a request for a cost change.
Cost Original	Enter the original amount for a cost change request detail item.
Cost Quoted	Enter the quoted amount for a detail item for a request for a cost change.
Cost Sts (cost status)	Enter a user-defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902). This field is optional.
From Cost Code	Enter the beginning cost code (subsidiary) account in a range of accounts. Leave this range blank to include all accounts.
Job Number	Enter the number of the job, or project, that the change request is associated with. This number must be set up in the Business Unit Master table (F0006).
Requested By	Enter the address book number of the person who initiated the change request.
Rev Sts (revenue status)	Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902). This field is optional.
Revenue Final	Enter the final revenue amount for a line item in the change request.
Revenue Original	Enter the original amount for a revenue change request detail item.
Revenue Quoted	Enter the quoted revenue amount for a line item in the change request.
Status	Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Status Code	Enter a code that indicates the status of the change request. It is for information only and is not attached to a ledger type. This code should not be confused with the status codes that are defined in the Change Request Detail Status Update table (F53101).
Status Revenue	Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Sub Sts (subcontract status)	Enter a user-defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in

	the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902). This field is optional.
Subcontract Final	Enter the final subcontract amount for a line item in the change request.
Subcontract Original	Enter the original amount for a subcontract change request detail item.
Subcontract Quoted	Enter the quoted subcontract amount for a line item in the change request.
Submitted Date	Enter the date that an item is scheduled to arrive or that an action is scheduled for completion.
To Cost Code	Enter the ending cost code (subsidiary) account in a range of accounts. Leave this range blank to include all accounts.

CHAPTER 1

Getting Started with PeopleSoft EnterpriseOne Change Management

This chapter provides an overview of PeopleSoft EnterpriseOne Change Management and discusses:

- Change Management integrations
- Change Management implementation

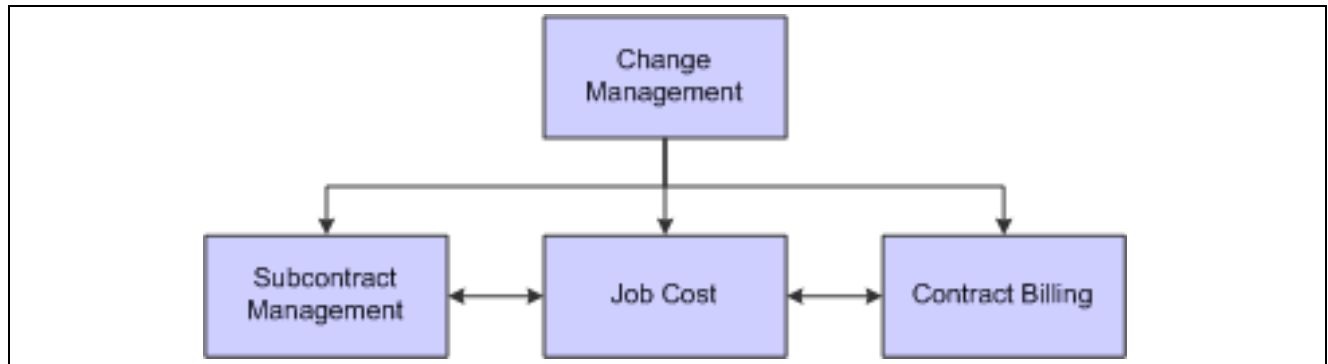
Change Management Overview

The PeopleSoft EnterpriseOne Change Management system enables you to monitor changes to a job or project through multiple revisions and approval stages. For example, you can:

- Move a change request through a series of approval stages
- Create requotes, which provides an audit trail for multiple quotations and stages of approval outside of the General Accounting and Job Cost systems
- Monitor changes by change request numbers
- Monitor changes by subledger detail
- Create an audit trail in General Ledger for line items in the change request as they are modified and approved
- Calculate the best amount of a change request line item based on its original, quoted, and final amounts
- Manage change requests by attaching related change requests to a planned change order and attaching related planned change orders to a change order
- Manage document control that is shared with the Subcontract Management system
- Use a search facility that supports a wide range of search criteria, such as job number, ledger type, supplier, account cost code, and cost type
- Commit change requests to Subcontract Management and Contract Billing

Change Management Integrations

The Change Management system integrates with these PeopleSoft EnterpriseOne systems:



Change Management Integrations

The Change Management system works with other PeopleSoft EnterpriseOne systems. We discuss integration considerations in the implementation chapters in this PeopleBook. Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

Subcontract Management

You can commit change requests to subcontracts that you are managing using Subcontract Management. For example, you can send information from a subcontract account on a detail line on a change request to the Subcontract Management system. Also, the Change Management system uses a document control feature that is shared with the Subcontract Management system.

Job Cost

You can use Change Management to track changes jobs you created and are managing using Job Cost. For example, you can define a detail status code that automatically updates the Job Cost budget ledger. Then, when you make a status change to a line item that has that status code assigned to it, the system moves amounts and quantities from the old ledger to the new ledger, thus keeping the ledgers balanced.

Contract Billing

You can commit change requests to contracts you are managing using Contract Billing. For example, you can send information from a revenue account on a detail line of a change request to the Contract Billing system.

General Ledger

You can create an audit trail in General Ledger for line items in the change request as they are modified and approved. The Account Ledger table (F0911) tracks revisions to account balance amounts and quantities by providing a detailed audit trail of transactions.

Change Management Implementation

This section provides an overview of the steps that are required to implement the Change Management system.

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in the *About These PeopleBooks*, with information about where to find the most current version of each.

Global Implementation Steps

This table lists the suggested global implementation steps for PeopleSoft EnterpriseOne Change Management:

Step	Reference
1. Set up companies, fiscal date patterns, and business units.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook</i> , “Setting Up an Organization”
2. Set up accounts, and the chart of accounts.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook</i> , “Setting Up Accounts”
3. Set up the General Accounting constants.	<i>PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook</i> , “Setting Up the General Accounting System”
4. Set up multicurrency processing, including currency codes and exchange rates.	<ul style="list-style-type: none"> • <i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook</i>, “Setting Up General Accounting for Multicurrency Processing” • <i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook</i>, “Setting Up Exchange Rates”
5. Set up ledger type rules.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook</i> , “Setting Up Ledger Type Rules for General Accounting”
6. Enter address book records.	<i>PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook</i> , “Entering Address Book Records”

Change Management Implementation Steps

This table lists the implementation steps for the Change Management system.

Step	Reference
1. Set up user-defined codes.	<u>Chapter 3, “Setting Up the Change Management System,” Setting Up User-Defined Codes for Change Management, page 11</u>
2. Set up change request detail status codes.	<u>Chapter 3, “Setting Up the Change Management System,” Setting Up Change Request Detail Status Codes, page 12</u>
3. Set up job-specific user-defined codes.	<u>Chapter 3, “Setting Up the Change Management System,” Setting Up Job-Specific User-Defined Codes, page 13</u>
4. Set up automatic accounting instructions (AAIs).	<i>PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook</i> , “Setting Up the General Accounting System,” Setting Up AAIs for General Accounting
5. Set up column versions.	<u>Chapter 4, “Creating Change Requests,” Understanding Change Requests, page 15</u>

CHAPTER 2

Understanding the Change Management System

This chapter discusses:

- Change management process.
- Tables and descriptions.

Change Management Process

This section discusses:

- Creating change requests.
- Creating planned change orders and change orders.
- Modifying change requests.

The PeopleSoft EnterpriseOne Change Management system is a flexible system of interrelated programs that lets you create a change management process to suit the organization. You can set up a very simple process by using only change requests to track changes to the accounts that are affected by changes to a job. Or you can create a more comprehensive process to automatically move change requests through an approval process; send information about changes to other PeopleSoft EnterpriseOne systems, such as Subcontract Management and Contract Billing; and track details about changes to a job.

Creating Change Requests

The change management process begins with change requests. You create change requests to track changes such as those to costs or to accounts charged or credited. When you create a change request, you assign detail status codes to each line item of account distribution information. These detail status codes indicate the line item's current stage in the approval process. As you revise account distribution information for a line item, you can update the status codes to move the change request to the next approval stage. If you set up the detail status codes to refer to account ledgers, you can automatically update ledgers with revised amounts when you update the status of a change request.

Creating Planned Change Orders and Change Orders

After you create change requests, you can group related change requests by attaching them to planned change orders (PCOs). You can group related PCOs by attaching them to change orders (COs). Grouping change requests and PCOs makes it easier to locate information about related changes.

Modifying Change Requests

After you create change requests, you might need to modify them.

Audit Trail

As a job progresses, you might need to modify change requests. The Change Management system lets you set a processing option so that the system creates an audit trail. When you set the Audit Trail processing option, the system writes information to the Account Ledger table (F0911).

Requotes

You can also track changes by generating requotes. A requote is a version of the change request. When you modify a change request, you can save the modified version as a requote. Then, when you need to view a history of changes, you can view the versions to compare the changes.

Status Updates

As the job progresses, you change the status of the change requests that are associated with it. The Change Management system lets you create detail status codes that you use to track the approval stage of the change request. You can associate ledger types with detail status codes. When you assign a status code that has a ledger type associated with it to a line item on a change request, you can update the appropriate ledger from the Change Management system. You can update detail status codes individually, or you can use the Global Status Update program to update numerous accounts simultaneously.

Reviewing Modifications

You can review the history of modifications made to a change request by viewing requotes; account ledger history; and by viewing original, quoted, and final amounts for affected accounts. You can also review all of the change requests for a job that have the same cost code, cost type, supplier, or ledger type.

Tables and Descriptions

The Change Management system uses these tables:

Table	Description
Change Request Master table (F5301B)	Stores change request master information, such as: <ul style="list-style-type: none"> • Job number • Change request number • Description • Status • Planned change order (PCO) number

Table	Description
Change Request Details table (F5311)	Stores detail information for change requests, such as: <ul style="list-style-type: none"> • Detail status code for each cost, revenue, and subcontract account • Line number • Ledger type • Requote number • Account cost code • Account cost type • Original, quoted, final, and best amounts for each account type • Subcontract number for subcontract accounts • Closed flag
Planned Change Order Master table (F5314)	Stores information for planned change orders (PCOs), such as: <ul style="list-style-type: none"> • Status • Closed flag • CO number of the change order to which the PCO is attached
Change Order Master table (F5315)	Stores information regarding a change order, such as: <ul style="list-style-type: none"> • Status • Closed flag
Business Unit Master table (F0006)	Stores job master information, including the job description, job number, job type, company, and category codes.
Account Ledger table (F0911)	Stores detail transactions in the general ledger. One record exists per transaction. The Account Ledger table tracks revisions to account balance amounts and quantities by providing a detailed audit trail of transactions.
Purchase Order Detail File table (F4311)	Stores master information for subcontract management, including subcontract numbers and vendor addresses.
Change Request Detail Status Update table (F53101)	Stores the detail status codes for the ledger that the system updates with the amount type and quantity for cost, revenue, and subcontract accounts.

Table	Description
Log Master Revision table (F4303)	Tracks information for contracts, including: <ul style="list-style-type: none"> • Job number • Change request number • Log type • Log number • Status • Dates
Log Master table (F4305)	Tracks information for logs at five levels, including: <ul style="list-style-type: none"> • Contract level logs • Company level logs • Subcontractor level logs • Project level logs • Job level logs
Account Master table (F0901)	Stores account definitions, including account numbers and descriptions. One record exists per account. The Account Master table enables the adjustment of the percentage of completion for jobs during profit recognition processing by using the header account that is created when a job master record is created.
Account Balances table (F0902)	Stores information about amount and unit ledger types that are used in detail status codes for change requests.
Job-Specific UDCs Master table (F53005)	Stores by job the user-defined code information that is specific to the Change Management system.
Ledger Type Master File table (F0025)	Stores rules for specific ledger types, such as: <ul style="list-style-type: none"> • Budget amounts • Budget units • Annual close budget • Summarize and close
Automatic Accounting Instructions Master table (F0012)	Stores the rules that determine how the system creates automatic balancing entries, special interim totals for reports, and general information about the chart of accounts.
User Defined Codes table (F0005)	Stores user-defined codes and their descriptions.

CHAPTER 3

Setting Up the Change Management System

This chapter contains an overview of the system setup and discusses how to set up the change management system.

Understanding Change Management System Setup

Before you use the Change Management system, you need to define certain information that is specific to the business which the system uses during change request processing.

This table lists the setup tasks that are required before you can use the Change Management system:

User-defined codes (UDCs)	Define customized codes that are appropriate for the business needs. For example, you can define codes that identify the priority of a change request, the type of change request, and planned change order and change order statuses.
Change request detail status codes	Define approval stages for accounts on a change request. You can associate account ledgers with detail status codes so that the system updates ledgers when you update the detail status code for an account on a change request.
Job-specific user-defined codes	Define codes that are specific to a job. For example, if you have several phases of a job, you can define a code for each phase of a job. You can then use the codes in each change request so that you know to which phase of the job the change request belongs.
Ledger type master	Define monetary decimals at the ledger type level. You can set up ledger types at the job or company level.
Automatic accounting instructions (AAIs)	Define the AAIs (CMxx) that the system uses when you commit a subcontract account in a change request detail line to the Subcontract Management system.
Column versions	View the saved column versions that you can use when you access the Change Request Entry program.

The programs for the listed tasks are located on the Change Management System Setup menu (G5341).

Setting Up the Change Management System

This section contains an overview of detail status codes and discusses how to:

- Set up user-defined codes for change management.
- Set up change request detail status codes.
- Set up job-specific user-defined codes.

Understanding Detail Status Codes

You must set up detail status codes in the Detail Status Code Update program before you can enter account distribution information for change requests.

For each detail status code, define:

- The type of account (cost, revenue, or subcontract) with which the code can be used.
- The amount ledger type to be updated in the Account Balances table (F0902) and the Account Ledger table (F0911).

Note. This program does not update the AA/AU, HA/HU, PA/PU, or F% ledgers.

- The amount type (original, quoted, final, or best) that appear and are updated in the Change Request Detail Status Update Table (F53101).

Note. Detail status codes are updated in the Change Request Detail Status Update table (F53101). They are not related to the status code field in the header on the Change Request Entry form. The status code in the header is for information only.

You cannot delete a status code if it has been used in Change Request Entry. You can only change the description of a status code if it has been used in Change Request Entry.

See Also

PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook, “Setting Up Ledger Type Rules for General Accounting”

PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook, “Setting Up the General Accounting System,” Setting Up AAIs for General Accounting

[Chapter 7, “Revising and Approving Change Requests, PCOs, and COs,” Working with Detail Status Codes, page 75](#)

Forms Used to Setup the Change Management System

Form Name	Form ID	Navigation	Usage
Work With User Defined Codes	W0004AA	Enter UDC in the Fast Path.	Set up user-defined codes.
Change Request Status Code Revisions	W53101B	Change Management System Setup menu (G5341), Detail Status Code Update. Click Add.	Set up change request detail status codes
Job Specific UDCs Detail	W53005D	Change Management User Defined Codes menu (G5342), Job Specific UDCs. Enter the job number and code and click Add.	Set up job-specific user-defined codes.

Setting Up User-Defined Codes for Change Management

You can use these user-defined codes (UDCs) as part of the identifying information of a change request. They are informational only.

User-Defined Code	Description
Change request header status (53/ST)	Use this code on the Change Request Entry form to indicate the overall status of the change request. This code has no effect on the ledger types and should not be confused with the detail status codes that are defined in the Change Request Detail Status Update Table (F53101).
Change request priority (53/PR)	Use these codes to track the urgency of a change request.
Change request type (53/TY)	Use these codes to help define the change request. For example, you might create codes that identify how change requests are priced.
Category codes (53/01-05)	Use these codes (1-5) to generate selective reporting that is based on user assigned values. For example, you might create a code that identifies whether a change was initiated by the owner or by the company.
Planned change order status (53/PC)	Use this code to indicate the status of a planned change order (PCO). If you enter a PCO status code in the PCO Approved Status processing option, the system opens the Global Status Update program when you approve a PCO. The Global Status Update program lets you update the status codes for the accounts on the change requests that are attached to a PCO.

User-Defined Code	Description
Change order status (53/CS)	Use this code to indicate the status of a change order (CO). If you enter a CO status code in the CO Approved Status processing option, the system opens the Global Status Update program when you approve a CO. The Global Status Update program lets you update the status codes for the accounts on the change requests that are attached to the PCOs which are attached to a CO.
Job-specific UDCs	Use these codes for UDCs that are specific to the Change Management system.




See Also

PeopleSoft EnterpriseOne Tools 8.94: Foundation PeopleBook

Setting Up Change Request Detail Status Codes

Access the Change Request Status Code Revisions form.

Detail Status Code Update - Change Request Status Code Revisions

OK Cancel Tools
  

Status	<input type="text" value="A"/>	
Record Type	<input type="text" value="B"/>	B=Cost, O=Revenue, S=Subcontract

Description	<input type="text" value="Approved"/>
Amount Ledger Type	<input type="text" value="JA"/>
Unit Ledger Type	<input type="text" value="JU"/>
Amount/Qty Type	<input type="text" value="F"/> O=Original, Q=Quoted, F=Final, B=Best

Change Request Status Code Revisions form

Status

Enter a code defined by the user that specifies the status of an account in a change request detail line. This code is used in the approval process of the

change request to determine if the system updates a ledger in the Account Balances table (F0902), to define which ledger type is updated, and to define which amount type the system uses to update the ledger.

Record Type

Enter the record type associated with change request detail information. Each change request can attach to multiple change items. Values are:

B: Budget, or Cost.

O: Owner, or Revenue.

S: Subcontract, or Buyout.

Blank: The system supplies the default value of B.

Amount Ledger Type

Enter a user-defined code (09/LT) that identifies the ledger to which you are posting amounts, such as BA (Budget Ledger) or FE (Field Estimate). You can set up multiple, concurrent ledgers within the general ledger to establish an audit trail.

Note. You cannot make journal entries directly to a ledger if the second letter of the ledger type is U (units).

Amount/Qty Type
(amount/quantity type)

Enter a code that specifies which amounts and quantities in the Change Request Details table (F5311) will be used for processing. Values are:

O: Original

Q: Quoted

F: Final

B: Best

Setting Up Job-Specific User-Defined Codes

You can define up to five UDCs for each job in the system. These UDCs are located on the Category Codes tab of the Change Request Entry form and are informational only.

Job-specific UDCs are stored in the Job Specific UDCs Master Table (F53005), not in the User Defined Codes table (F0005).

Job Number

Enter the number of the job, or project, that the change request is associated with.

This number must be set up in the Business Unit Master table (F0006).

Code Field

Enter a code that identifies and defines a unit of information. It is an alphanumeric code up to 8 characters long that does not enable blanks or special characters such as %, &, or +. You create new data items using system codes 55-59. You cannot change the alias.

User Def Code (user defined code)

Enter a list of valid codes for a specific user-defined code list.

Description 2

Enter additional text that further describes or clarifies a field in the system.

Special Handling

Enter a code that indicates special processing requirements for certain user-defined code values. The value that you enter in this field is unique for each user-defined code type.

The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify whether the language is double-byte or does not have uppercase characters. Programming is required to activate this field.

Hard Coded

Enter a code that indicates whether a user-defined code is hard-coded. Values are:

Y: The user-defined code is hard-coded.

N: The user-defined code is not hard-coded.

A checkmark indicates that the user-defined code is hard-coded.

CHAPTER 4

Creating Change Requests

This chapter provides an overview of change requests and discusses how to:

- Enter basic change requests.
- Copy account balances.
- Enter change request fee calculations.
- Review change requests.
- Revise change requests.

Understanding Change Requests

This section provides an overview of change requests and discusses:

- Organizing change requests.
- Components of a change request.
- Detail status codes.

You use change requests to record and monitor changes to a job as the job progresses. A change request is the lowest level in the change management hierarchy and contains the detailed information that you need to track changes to a job. After you create change requests, you can attach related change requests to the next level in the hierarchy—the planned change order. Attaching related change requests to a planned change order makes locating specific change requests easier.

See [Chapter 5, “Creating Change Management Hierarchy,” page 51](#).

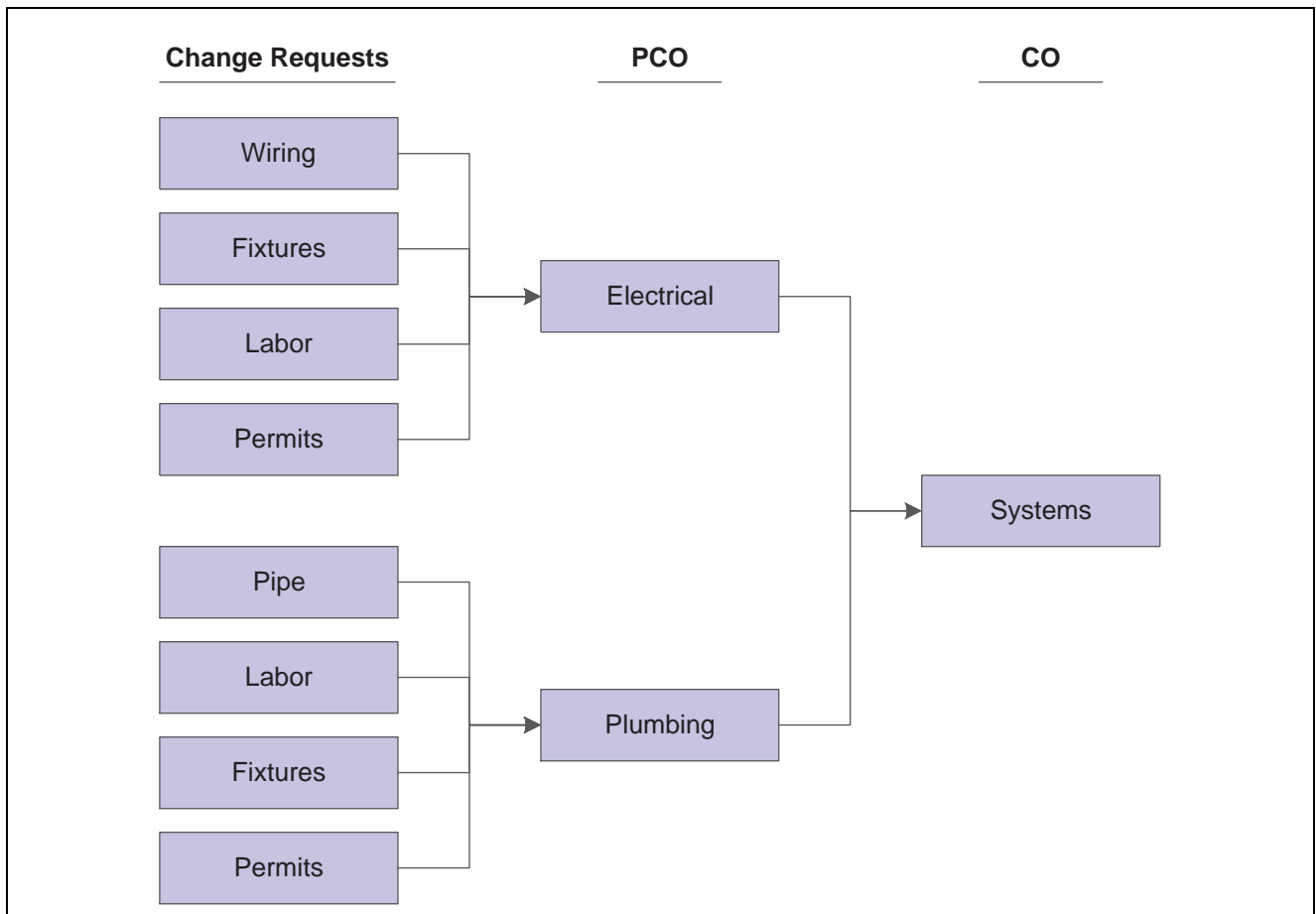
Organizing Change Requests

Before you create any change requests for a job, you should decide how detailed you want the change request hierarchy to be. You can use a high level or a low level of detail. Whether you decide to use a high level or low level of detail, you can still attach related change requests to planned change orders (PCOs), and related PCOs to change orders (COs) to further organize the change requests.

A large job might have hundreds of changes. You can organize the changes in many ways to suit the needs of the business. For example, you can create hundreds of change requests, each of which has only a few line items, or you can create fewer change requests, each of which has many line items.

When you create hundreds of change requests, you create a change request hierarchy that has a high level of detail. Each change request in a high-detail level hierarchy is very specific. For example, you might create a change request that contains only line items for electrical wiring changes for the month of May, one that has wiring changes for June, one that has changes to fixtures for May, one with fixture changes for June, and so on. Each change request might have only a few line items, but you will need to keep track of many change requests.

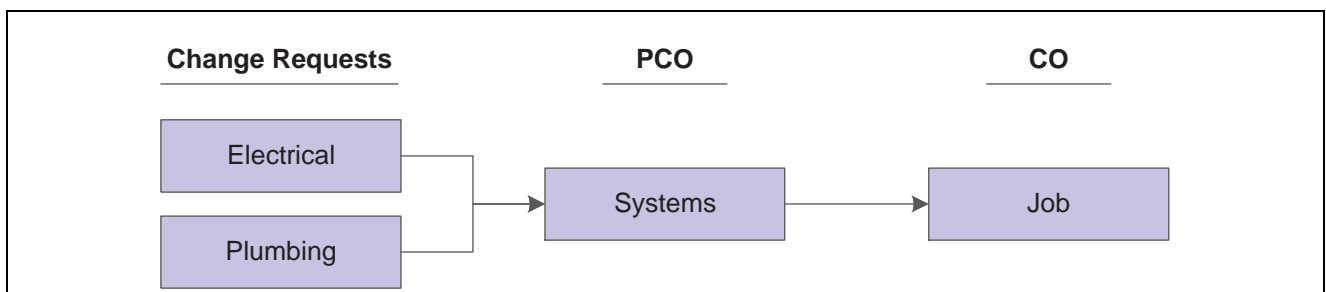
This graphic shows an example of a hierarchy with a high level of detail:



Hierarchy with High Level of Detail

When you create fewer change requests that each have many line items, you create a low-detail level hierarchy. For example, you might create a change request for all electrical changes. That one change request might contain changes for wiring, fixtures, labor, and permits over the entire course of the job. Such a change request probably has dozens of line items, but you only need to review one change request when you are searching for information or must modify a line item.

This graphic shows an example of a hierarchy low:



Hierarchy with Low Level of Detail

Using Hierarchy Detail Levels

The decision to use a high level of detail or a low level of detail might depend on the number of jobs or the number of changes that you need to track. Before you decide how to organize the change requests, you should also understand how the Global Status Update program works. Because the Global Status Update program lets you move groups of accounts on a change request through the approval process, how you group the change requests might affect how you use the Global Status Update program.

See [Chapter 7, “Revising and Approving Change Requests, PCOs, and COs,” Understanding Global Status Updates, page 75.](#)

This table lists some of the benefits and drawbacks of each level:

<p>High-detail level</p>	<p>Benefits include:</p> <ul style="list-style-type: none"> • All line items are very closely related. • Since all of the line items are closely related, the Global Status Update program might be easier to use. • Planned Change Order reports display totals for all change requests attached to the PCO. <p>Drawbacks include that you must review many change requests to find the one with the line items that you need.</p>
<p>Low-detail level</p>	<p>Benefits include:</p> <ul style="list-style-type: none"> • Fewer change requests. • If all lines and accounts on the change request move through the approval process at the same time, you can save time by using the Global Status Update program to change them to the next status. <p>Drawbacks include:</p> <ul style="list-style-type: none"> • Many line items on each change request. • Sorting through line items might be difficult. • When using the Global Status Update program when accounts on a change request do not move through the approval process as a group, you must be careful not to change detail status codes that you do not want to change.

Components of a Change Request

A change request always includes:

- A job number to link the change request to a job.
- A description to define the type of change request.
- Account distribution information for each line item to provide details about the accounts that are affected by the change. The account distribution information includes the type of account (cost, revenue, subcontract) and the original, quoted, and final amounts for the account types that are displayed. You can enter positive and negative monetary amounts.
- A detail status code to provide the approval stage of the change request.

In addition, a change request can include:

- Subcontract or contract information to link information from the subcontract or revenue account on a detail line on a change request to the appropriate contract in the Subcontract Management or Contract Billing system.
- General information to help identify the change request, such as the originator, the person who requested it, and the responsible manager.
- Information about related documents, such as submittals, transmittals, and engineering drawings.
- Extended text to further explain the change request.

Detail Status Codes

You use detail status codes to indicate the approval stage of an account on a change request. Detail status codes are UDCs that define:

- Which ledgers in the Job Cost system to update.
- The record type (cost, revenue, or subcontract).
- The amount and quantity type of the line item (original, quoted, final, or best).

Different status codes often represent different stages of the process. For example, you might have codes for accounts that are submitted, rejected, committed to Subcontract Management, and approved. At any time during the approval process, you can update the detail status code manually or by using the Global Status Update program.

When you set up detail status codes in the Change Request Detail Status Update Table (F53101), you associate each of them with an amount type (original, quoted, final, or best) and with a record type (cost, revenue, or subcontract). You also associate ledger types with some of the detail status codes. Associating amount, record, and ledger types with detail status codes lets you use the status codes to specify how the system updates account balance information at various approval stages.

Detail status codes update ledger information only if you associate a ledger type with the status code. When you update an account in a detail line with a detail status code that is associated with a ledger type, the system updates the appropriate ledger. You typically associate a ledger type with a status code that signifies that the detail line item on the change request is approved. When you attach a ledger type to a detail status code, you also specify which amount type (original, quoted, final, or best) that the system uses when updating the associated ledger.

You define detail status codes in the Change Request Detail Status Update Table.

Note. Do not confuse status codes that are defined in the Change Request Detail Status Update Table (F53101) with status codes that are defined in the User Defined Codes table (F0005). Status codes that are defined in the User Defined Codes table provide information for a change request and are informational only. They do not update ledgers.

See Also

[Chapter 3, “Setting Up the Change Management System,” Setting Up Change Request Detail Status Codes, page 12](#)

Entering Basic Change Requests

This section provides an overview of change request entry and account distribution information, lists prerequisites, and discusses how to:

- Set processing options for the Change Request Entry program (P5310).
- Enter basic change request information.
- Enter cost account information.
- Enter revenue account information.
- Enter subcontract account information.
- Enter general detail line information.

Understanding Change Request Entry

Change requests track changes to a job as it progresses. You can enter a single line item or multiple line items for each change request. Typically, you set up a change request that relates to a specific aspect of the job. For example, if the job is to construct an office building, change request 1 might be for tracking foundation details, change request 2 for framing details, and so on.

Change requests consist of:

- General change request information
- Account distribution information for cost, revenue, and subcontract accounts
- Subcontract information that enables you to send the account distribution information to the appropriate contract in the Subcontract Management system
- Revenue information that enables you to send the account distribution information to the appropriate contract in the Contract Billing system
- Detail status codes to track the approval status

After you have entered basic information for the change requests, you can enter additional information, exit to other programs, print reports, create requotes, and update statuses. Use the Form and Row menus from the Change Request Entry form to access these features.

Fields on the Change Request Entry Form

The system completes some of the fields on the Change Request Entry form. In addition, the columns that you select to display in the Change Request Entry form affect the information that is available for you to review. This table lists information about some of these fields:

Requote	Display the number of the requote that is currently displayed.
Blank field to the right of Requote	Displays the date when the requote was created.
Job Totals Best	Displays the best total amounts for the cost, revenue, and subcontract accounts for the entire job.

Totals (Original, Quoted, Final, or Best)	Displays the total amounts for the cost, revenue, and subcontract accounts for the change request that is currently displayed. If the Cost, Revenue, or Subcontract fields to the right of the Totals field are blank, then the change request does not have amounts for those fields. You select whether the system displays the total of the original, quoted, final, or best amounts by setting a processing option.
Column Version	Displays the name of the column version that you entered on the Default tab for the processing options.
Grid Column fields	<p>The columns that you select on the Display tab on the Change Order Entry form affect which columns that you can work with when:</p> <ul style="list-style-type: none"> • Entering account information • Copying amounts and units • Using the Windows/Messages-Copy, Unequal, Change, Status program (P53WIN) • Selecting accounts from the G/L Account Search form • Selecting accounts from the G/L Inquiry option on the Row menu • Exiting to the Subcontract Management system from the Change Request Entry form <p>For example, if you select Cost Column, the system displays only cost account information on the Change Request Entry form, and does not let you inquire about revenue accounts or exit to the Subcontract Management system.</p>
Unavailable fields	The system grays-out fields to which changes are not allowed. For example, after you commit a subcontract account to the Subcontract Management system in final mode, the system makes all of the subcontract fields unavailable for editing.

Form Menu Features

This table lists the Form menu options on the Change Request Entry form:

Option	Description
Account Master Pick	You can select which accounts are included in a change request through the chart of accounts that are already set up for the job. You can define whether you want the header account or the detail account description displayed for cost, revenue, and subcontract accounts.

Option	Description
Requotes	<p>You can create requotes to track changes that you make to account distribution information. A requote is a version of the detail line. After you create a requote, you can use it to compare changes that are made to the detail line. Select from these options:</p> <ul style="list-style-type: none"> • Prior Requote. Use this option to view the previous requote. • Next Requote. Use this option to view requotes that were created after the original requote. • Generate Requote. Use this option to create a new requote.
Copy Amounts	<p>The Copy Amounts option on the Form menu lets you copy amounts and units for all of the line items on a change request for columns that are currently displayed. This option saves time with data entry when you need to update all amounts and units. Select from these options:</p> <ul style="list-style-type: none"> • Original to Quote. This option copies the original amount to the quoted amount or unit. • Quoted to Final. This option copies the quoted amount to the final amount or unit. <p>Note. The Copy Amounts option on the Row menu lets you copy amounts and units for a specific line on a change request.</p>
Global Status	<p>You can globally update the detail status code for cost, revenue, and subcontract accounts for all of the detail line items on a change request. This option saves time with data entry. When you select Global Status, the system prompts you to specify the codes that you want to change.</p> <p>Note. The Global Status Update program updates only the detail status codes for the columns (cost, revenue, and subcontract) that are displayed.</p>
Create PCO	<p>You can automatically create a planned change order (PCO) and attach an existing change request to it. When you use this option, the system attaches the current change request to a PCO that the system creates. The PCO has the same title as the change request, a PCO status of Submitted, and the current date for the PCO submitted date.</p>
PCO Entry	<p>You can exit directly to the Planned Change Order Entry program (P5314) to view change requests that are attached to PCOs or to create a PCO.</p>
CO Entry	<p>You can exit directly to the Change Order Entry program (P5315) to view PCOs that are attached to COs or to create a new CO.</p>

Option	Description
Log Revisions	You can exit to the Log Master Revisions program (P4303) in the Subcontract Management system. This program tracks and controls money for jobs by vendor and contract. You can set up prerequisites and enter additional data.
Save Columns	You can save a column version for the Change Request Entry program. This option defines which columns the system displays when you access the program. After you save a column version, you can set a processing option to have the system display the saved column version when you access the Change Request Entry program.
Delete Change Request	You can delete a change request if you have not entered detail information for the change request.
Print Summary/Detail	You can print a Change Request Summary or Detail report. A processing option controls whether the report is a summary or detail report, and which version the system uses.
Attachments	You can attach documents, images, and other media to change requests from the Media Objects form.
Fee Calculation	You can use the Change Request Fee Calculation program (P5320) to calculate a total amount that is based on the final cost amounts on a change request. You can enter a percentage or fixed amount for the system to calculate fees, overhead amounts, or both.

Row Menu Features

This table lists the Row menu options on the Change Request Entry form:

G/L Inquiry	You can inquire on a specific account (cost, revenue, or subcontract) in the change request through the Account Ledger Inquiry program (P09200).
Additional Details	<p>You can change some information regarding cost, revenue, or subcontract details in the change request. Data for cost and revenue accounts is informational only.</p> <p>When you select the Subcontract Details tab, you can search for and complete subcontract information, and submit a subcontract account to the Subcontract Management system. If you create a terms-only change request, you do not need to enter a final amount to commit the change request.</p>

Copy Amounts	<p>You can copy amounts and units for a selected line item on a change request for columns that are currently displayed. Select from these options:</p> <ul style="list-style-type: none"> • Original to Quoted. This option copies the original amount to the quoted amount or unit. • Quoted to Final. This option copies the quoted amount to the final amount or unit. <p>Note. The Copy Amounts option on the Form menu lets you copy amounts and units for all line items on a change request.</p>
Subcontracts	<p>When you select a row containing a subcontract account that has an associated contract number, you can exit to the Order Header form in the Purchase Orders program (P4310), and view or complete additional subcontract information.</p>
Delete Detail Line	<p>You can delete a detail line item if it was entered in error. You can only delete a detail line item if you have not assigned to it a detail status code that has an associated ledger type, or if it is not closed. You can only delete a detail line item that has a subcontract account if the account has not been committed to the Subcontract Management system.</p>
Attachments	<p>You can attach documents, images, and other media to change requests from the Media Objects form.</p>
Fee Calculation	<p>You can use the Change Request Fee Calculation program (P5320) to calculate a total amount that is based on the final cost amounts on a change request. You can enter a percentage or fixed amount for the system to calculate fees, overhead amounts, or both.</p>
Log Master	<p>You can use the Log Master program (P4305) to review all logs for a job at these levels:</p> <ul style="list-style-type: none"> • Contract level logs • Company level logs • Subcontractor level logs • Project level logs • Job level logs

Change Request Information

When you create a change request, you can enter one line item or multiple line items. Each line item can have any combination of cost, revenue, and subcontract accounts.

Information in the header area-- such as the header status, priority, dates, and job-specific UDCs-- of a change request is shared. When you create change requests, assume that all of the line items share the header information.

Information in the detail area-- such as the cost, revenue, and subcontract accounts that are affected by the change-- of a change request can be different for each line item.

Technical Considerations

This table discusses technical considerations for ledger types and subcontract commitments:

Ledger types	<p>If you use a detail status code that has a ledger type attached to it, the system copies information into the Account Ledger table (F0911) as follows:</p> <ul style="list-style-type: none"> • The description of the general information for the change request is copied into the Alpha Explanation field (EXA). • The description of the account distribution information for the change request is copied into the Remark Explanation field (EXR). • The change request number is copied into the second reference field (R2).
Subcontract commitment	<p>Once you commit a subcontract in final mode, several subcontract fields are disabled to prevent editing.</p>

Related Tasks

This table discusses tasks that are related to change requirements:

Changing account numbers	<p>You can change an account number for a line item only if no detail status code with a ledger type attached to it has been assigned to the account in the line item.</p>
Deleting line item information	<p>You can delete all line item information for a change request only if no ledger types are attached to any detail status codes in any line items, if the change request is not closed, and if a subcontract or revenue account on the detail line item has not been committed.</p>
Deleting change requests	<p>You can delete a change request only if you have not entered information for the change request in any of these tables:</p> <ul style="list-style-type: none"> • Account Balances (F0902) • Account Ledger (F0911) • Change Request Details Table (F5311) • Planned Change Order Master Table (F5314) • Log Master (F4303)

Understanding Account Distribution Information

You can enter any combination of these categories of account distribution information for each line item that you create in a change request:

- Cost or budget information that is associated with the company

- Revenue information that is associated with the owner
- Subcontract information that is associated with suppliers

You must enter a detail status code for each type of account (cost, revenue, or subcontract) for each line item. If the detail status code has a ledger type assigned to it, the status code causes the system to update the account balance for that ledger. You set up different status codes for each account type so that you can use the same account number for cost, revenue, and subcontract accounts; and cause the system to update different ledgers for the accounts.

You can enter account distribution information in either of these ways:

- Enter multiple accounts. When you enter multiple accounts, the system creates a separate line item for each account that you select from the G/L Account Search form. The system also supplies the description and unit of measure that are associated with the account. The system adds the line items, starting with the first blank line on the Change Request Entry form.
- Enter accounts to line items one at a time. This option is useful when you want to add accounts after the line items have been created. For example, if you access a line item that has only a cost account, you can manually add the information for a revenue account to the line.

Account distribution information is stored in the Change Request Master Table (F5301B) and the Change Request Details Table (F5311).

See Also

PeopleSoft EnterpriseOne Tools 8.94: Foundation PeopleBook

PeopleSoft EnterpriseOne Job Cost 8.11 PeopleBook, “Setting Up Jobs,” Setting Up Job Master Records

[Chapter 4, “Creating Change Requests,” Organizing Change Requests, page 15](#)

[Chapter 4, “Creating Change Requests,” Copying Account Balances, page 42](#)

[Chapter 5, “Creating Change Management Hierarchy,” Creating a Planned Change Order, page 56](#)

[Chapter 5, “Creating Change Management Hierarchy,” Creating a Change Order, page 61](#)

[Chapter 7, “Revising and Approving Change Requests, PCOs, and COs,” Understanding Detail Status Codes, page 75](#)

[Chapter 7, “Revising and Approving Change Requests, PCOs, and COs,” Understanding Global Status Updates, page 75](#)

[Chapter 8, “Using Subcontract Information Commitment,” Modifying Subcontract Logs, page 94](#)

[Appendix A, “PeopleSoft EnterpriseOne Change Management Reports,” Change Management Reports, page 105](#)

Prerequisites

Before you complete the tasks in this section:

- Verify that the job exists in the Job Cost system.
- Verify that detail status codes are set up in the Change Request Detail Status Update Table (F53101). See [Setting Up Change Request Detail Status Codes in the Change Management Guide](#) to review the codes.

Forms Used to Enter Basic Change Requests

Form Name	Form ID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry. Enter a job number and click Add.	Enter basic change request information.
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry. Enter a job number, click Find, and select the request.	Enter cost account information.
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry. Enter a job number, select to skip to the change request, and click Find. Select the request.	Enter revenue account information Enter subcontract account information. Enter general detail line information.

Setting Processing Options for Change Request Entry (P5310)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Edit

Use this processing option to specify system requirements for account numbers and dates. You can use the Acct Master Pick option on the Form menu to list and select valid account numbers for the job. The system also completes the general ledger date when you use Acct Master Pick. Alternatively, you can use the Search button in the cost, revenue, and subcontract Account Number fields to select an account number; or you can manually enter the account number. When you select an account number or manually enter one, the system completes the G/L Date field if you do not enter a date.

1. Account Numbers and Dates

Use this processing option to specify whether the system always requires master account numbers and general ledger dates. Values are:

Blank: Require account numbers and dates only if the detail status code for the account is attached to a ledger type.

I: Always require account numbers and dates.

Audit

Use this processing option to specify how the system creates audit trail records for modifications to change requests. You can specify that the system create new records for each period that replace existing records, create new records in addition to existing records, or does not create any records. This option applies only to change requests that are updated from the Change Request Entry program.

1. Audit Trail - F0911

Use this processing option to specify how the system creates audit trail records in the Account Ledger table (F0911). Values are:

Blank: Create audit trail records per period change. The system determines whether an account ledger record that has the general ledger date of the period end exists. If a record exists, the system updates the record with the new information. If a record does not exist, the system creates a record.

I: Create multiple audit trail records. The system creates new records without determining if other account ledger records exist.

2: Do not create audit trail records.

Default

Use these processing options to specify default values for the Owner Change Required field, the general ledger date, subledgers and subledger types, change request total calculations, automatic PCO numbers, and column versions. You can override the default values on the Change Request Entry form.

1. Owner Change Required

Use this processing option to specify the default value for the Owner Change Required field. If you leave this option blank, the system uses a default value of N.

Use this processing option to specify the default value for the general ledger date. Values are:

Blank: Use the date from the Company Fiscal Date Patterns.

I: Use the current system date.

2. G/L Date (general ledger date)

Use this processing option to specify the default value for the general ledger date. Values are:

Blank: Date from company fiscal date pattern.

I: Date is system date.

3. Subledger and Subledger Type

Use this processing option to specify the default value for the subledger and the subledger type. Values are:

Blank: Do not enter a value in the Subledger or Subledger Type field.

I: Enter the change request number in the Subledger field and enter *J* in the Subledger Type field.

4. Cost, Revenue, Subcontract Totals

Use this processing option to specify how the system calculates change request totals. Values are:

I: Use original amounts to calculate change request totals.

2: Use quoted amounts to calculate change request totals.

3: Use final amounts to calculate change request totals.

4: Use best amounts to calculate change request totals.

Blank: The system uses best amounts to calculate change request totals.

The system calculates the best amount based on which of the combinations of original, quoted, and final amounts you enter for an account type on the Change Request Entry form:

- If you enter a final amount alone or in any combination with other amounts, the system uses the final amount as the best amount.
- If you enter a quoted and an original amount, but do not enter a final amount, the system uses the quoted amount as the best amount.

If you enter only an original amount, the system uses the original amount as the best amount.

5. Create PCO Number
(create planned change order number)

Use this processing option to specify the number that the system uses as the planned change order (PCO) number when you create a new planned change order. Values are:

Blank: Use the change request number as the PCO number. The system uses the number of the first change request that you attach to the planned change request.

I: Use the next available number as the PCO number.

6. Column Version

Use this processing option to specify the column version that the system uses when you access the Change Request Entry form. If you specify a version, the system retrieves the selected columns. If you leave this processing option blank, the system displays all columns.

You create column versions to use in the Change Request Entry program by using the Save Columns option on the Form menu.

Note. You can look up the existing column names for Change Management by using the Column Versions - User Overrides option on the Change Management System Setup menu. Inquire with Application equal to the Change Request Entry program (P5310) to find the column versions for the Change Request Entry program.

7. Restrict Column Version

Use this processing option to specify whether to restrict changes and additions to column versions. Values are:

Blank: Restrict changes and additions to column versions.

I: Allow changes and additions to column versions.

8. Default Cost Status Code

Use this processing option to specify the default status code for a cost account. Confirm that this status code has been set up in the Change Request Detail Status Code Update program (P53101).

9. Default Revenue Status Code

Use this processing option to specify the detail status code for a revenue account. Confirm that this status code has been set up in the Change Request Detail Status Code Update program (P53101).

10. Default Subcontract Status Code

Use this processing option to specify the detail status code for a subcontract account. Confirm that this status code has been set up in the Change Request Detail Status Code Update program (P53101).

11. Default Header Status Code

Use this processing option to specify the default status code to be assigned to a Change Request (CR). Confirm that the code you enter has been set up in UDC 53/ST (Change Request Header Status).

Amounts

Use these processing options to specify:

- How the system updates cost and revenue amounts from subcontract amounts
- Whether the system displays a warning message when cost or revenue amounts do not equal subcontract amounts

1. Revenue amounts updated from

Use this processing option to specify how the system updates revenue amounts from subcontract amounts. When you select option *1*, *2*, or *3*, you cannot complete the revenue fields affected by the options. The system completes the revenue amount and detail status code fields for you. For example, if you select option *1*, the system makes the revenue amount fields uneditable and completes those fields with the amounts you enter in the corresponding subcontract account fields. The system also uses the detail status code you enter for the subcontract account for the revenue detail status code. Values are:

Blank: The system does not update revenue amounts.

1: Revenue amounts equal all subcontract amounts. The system writes the subcontract original, quoted, and final amounts for an account to the original, quoted and final amount fields for the corresponding revenue account.

2: Revenue original amount equals subcontract best amount. The system calculates the best amount for the subcontract account and writes it to the Revenue Original field for the corresponding revenue account. If the best amount changes after the system writes to the Revenue Original field, the system updates the field to indicate the current best amount.

3: Revenue amounts equal subcontract amounts plus cost amounts. The system adds the amounts for each type of quantity amount for the subcontract and cost accounts and writes them to the original, quoted, and final amount fields for the corresponding revenue account. For example, if you complete the Cost Original and Subcontract Original fields for a detail line, the system completes the Revenue Original field with the total of the Cost Original and Subcontract Original fields.

2. Display when Revenue and

Use this processing option to specify whether the system displays a message when revenue and subcontract amounts are unequal. Values are:

Blank: Do not display message.

1: Display message.

3. Cost amounts updated from

Use this processing option to specify how the system updates cost amounts from subcontract amounts. When you select option *1* or *2*, you cannot complete the cost fields affected by the options. The system completes the cost amount and detail status code fields for you. For example, if you select option *1*, the system makes the cost amount fields uneditable and completes those fields with the amounts that you enter in the corresponding subcontract account fields.

The system also uses the detail status code that you enter for the subcontract account for the cost detail status code. Values are:

Blank: The system does not update cost amounts.

1: Cost amounts equal all subcontract amounts. The system writes the subcontract original, quoted, and final amounts for an account to the original, quoted, and final amount fields for the corresponding cost account.

2: Cost original amount equals subcontract best amount. The system calculates the best amount for the subcontract account and writes it to the Cost Original field for the corresponding cost account.

If the best amount changes after the system writes to the Cost Original field, the system updates the field to indicate the current best amount.

4. Display when Cost and Subcontract

Use this processing option to specify whether the system displays a message when cost and subcontract amounts are unequal. Values are:

Blank: Do not display message.

1: Display message.

Contract

Use this processing option to specify whether the system returns a contract number for a revenue or subcontract line item. The system returns a contract number according to this processing option when you use the Acct Master Pick option on the Form menu.

1. Return Contract Number

Use this processing option to specify whether the system returns a contract number from the Account Master Pick program for a revenue or subcontract line item. A job number match returns a contract for a revenue line item record. A short account number match returns a contract for a subcontract line item record. Values are:

Blank: Do not return a contract number.

1: Return the subcontract number.

2: Return the billing contract number.

3: Return the subcontract and the billing contract numbers.

Contract Commit

Use these processing options to specify how the system commits a contract on a detail line on a change request to the Contract Billing system.

1. Process Mode

Use this processing option to specify whether the system runs the Contract Commit program in proof or final mode. You should run the program in proof mode before you run it in final mode so that you can view the report that the system generates. After you review the report and make any necessary changes, run the program in final mode. When you run the program in final mode, the system updates the appropriate tables and generates a report. Values are:

0: Run the program in proof mode.

1: Run the program in final mode.

2. Change Request Status Code for Revenue

Use this processing option to specify the detail status code that the system assigns to a contract account in a detail line when you commit the line item to the Contract Billing System. Verify that the status code has been set up in the Change Request Detail Status Code Update program (P53101).

Subcontract Commit

Use these processing options to specify how the system commits a subcontract account on a detail line on a change request to the Subcontract Management system.

- 1. Process Mode** Use this processing option to specify whether the system runs the Subcontract Commit program in proof or final mode. You should run the program in proof mode before you run it in final mode so that you can view the report that the system generates. After you review the report and make any needed changes, you can run the program in final mode. When you run the program in final mode, the system updates the appropriate tables and generates a report. Values are:
- Blank: Run the program in proof mode.
- I*: Run the program in final mode.
- 2. Subcontract Change Order Number** Use this processing option to specify the subcontract change order number that the system assigns to the subcontract account in a detail line on a change request. The subcontract change order number is the number assigned to a change order that was created in the Subcontract Management system. Values are:
- Blank: Use the number from the existing subcontract change order.
- I*: Use the value that you specify in the Subcontract Change Order Number processing option.
-
- Note.** You can only use the number from the existing subcontract change order if no payments have been made for the subcontract. If payments have been made and you do not specify a value in the Subcontract Change Order Number processing option, the system uses the next available number.
-
- 3. Subcontract Detail Line Item** Use this processing option to specify how the system updates the Purchase Order Detail table (F4311) when you commit a subcontract account in a detail line to the Subcontract Management system. Values are:
- Blank: Create a new line item for a subcontract for the Purchase Order Detail table.
- I*: Update an existing line item for a subcontract for the Purchase Order Detail table. The amount committed replaces the current amount for that line item if no payments have been made.
- 4. G/L Account (general ledger account)** Use this processing option to specify the general ledger account to be used when the system commits a subcontract account in a detail line to the Subcontract Management system. Values are:
- Blank: Use the existing account.
- I*: Use the account specified in the AAIs for Change Management.
- 5. Subcontract Status** Use this processing option to specify the detail status code that the system assigns to a subcontract account in a detail line when you commit the line item to the Subcontract Management system. Verify that the status code has been set up in the Change Request Detail Status Code Update program (P53101).
- 6. Log Revisions: Log Type** Use this processing option to specify the log type that the system assigns to a log.
- 7. Log Master (P4305) Version** Use this processing option to specify the version for the Logs Entry (P4305) program.

- 8. Log Revisions: Pay Effect** Use this processing option to specify the pay effect code that the system assigns to a log when the system creates a log. Values are:
Y: Issue warning message.
N: Do not issue warning message.
- 9. Subcontract/PO Entry (P4310)** Use this processing option to specify the version that the system uses when it commits a subcontract account. The commit process uses server XT4311Z1, which uses the version you select for P4310.
 Before you specify a version, review the version's processing options to ensure that the version meets the requirements. If you leave this option blank, the systems uses version ZJDE0015.
- 10. Terms Only Line Type** Use this processing option to specify a code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces, such as General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management. It also specifies the conditions under which a line prints on reports, and it is included in calculations. Values include:
S: Stock item
J: Job cost
N: Nonstock item
F: Freight
T: Text information
M: Miscellaneous charges and credits
W: Work order

Versions

Use these processing options to specify the version that the system uses for applications and reports when you access the Planned Change Order Entry and Change Order Entry programs from the Change Request Entry program. In addition, you can specify the version for the Change Request Summary Report, and specify whether to run the report in summary or detail mode. If you do not specify a version for these options, the system uses version ZJDE0001 for applications and version XJDE0001 for reports. If you do not specify otherwise, the system produces a detail report.

- 1. Planned Change Order Entry (P5314)** Use this processing option to specify the version that the system uses for change request reports when you access the Planned Change Order Entry program.
 Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. The default version is ZJDE0001.
- 2. Change Order Entry (P5315)** Use this processing option to specify the version that the system uses when you access the Change Order Entry program. Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. The default version is ZJDE0001.
- 3. Change Request Summary/Detail** Use this processing option to specify whether the system generates the Change Request report as a detail or summary report. Values are:

Blank: Print a detail report.

I: Print a summary report.

Version

Use this processing option to specify the version that the system uses when you access the Change Request Summary/Detail Report (R534011/R53411).

Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. If you leave this option blank, the system uses version XJDE0001.

Entering Basic Change Request Information

Access the Change Request Entry form.

1. On Change Request Entry, complete these fields on the Header tab:
 - Change Request
 - Description
 - Status Code
 - Owner Change Req
 - Type
 - Priority Code
2. To display the appropriate columns for the type of account (cost, revenue, or subcontract) for which you are entering a change request, click the Display tab and select the option for the type of columns that you want to work with. You can enter information only for the columns that are displayed.
 - To display columns for cost accounts, select Cost Column.
 - To display columns for revenue accounts, select Revenue Column.
 - To display columns for subcontract accounts, select Subcontract Column.
 - To display columns for cost and revenue accounts, select Cost, Revenue Columns.
 - To display columns for cost and subcontract accounts, select Cost, Subcontract Columns.
 - To display columns for revenue and subcontract accounts, select Revenue, Subcontract Columns.
 - To display all columns, select All Columns.
3. To save the selected columns as a column version that you can specify in a processing option, select Save Columns from the Form menu.
4. On Change Management Column Version, complete the Column Version field and click OK:
5. Select the columns that you want before entering additional data for the change request.

You can select accounts only for the columns that are displayed.
6. Select Acct Master Pick from the Form menu.
7. On G/L Account Search, click Find.

In the detail area of the form, the system displays the chart of accounts that is set up for the job.

Note. You can specify default status codes for the header and detail in the processing options.

8. Select the accounts that you want to include in the change request, and then select an option from the Row menu.

Note. You can only select an option that applies to the types of columns that are on the Change Request Entry form. For example, you can only select Cost Detail if cost columns are displayed, and you can only select All Detail if all of the column types are displayed. To include the header information for a cost account, select Cost, and then Cost Header. To include the detail information for a cost account, select Cost, and then Cost Detail.

To include the header information for a revenue account, select Revenue, and then Revenue Header. To include the detail information for a revenue account, select Revenue, and then Revenue Detail.

To include the header information for a subcontract account, select Subcontract, and then Subcontract Header. To include the detail information for a subcontract account, select Subcontract, and then Subcontract Detail.

To include the header information for all accounts, select All Accounts, and then All Header. To include the detail information for all accounts, select All Accounts, and then All Detail.

The system completes the appropriate account number fields on the detail lines of the Change Request Entry form.

9. Click the Additional Selections tab and complete these optional fields:

- Remark
- Reference 1
- Reference 2
- Reference 3

10. Click the Addresses/Dates tab and complete these optional fields:

- Originator
- Requested By
- Approval Date
- Planned Start
- Planned Finish
- User Defined Date #1
- User Defined Date #2
- User Defined Date #3

11. Click the Category Codes tab, complete these optional fields:

- Initiated By
- Area
- Category Code 3
- Category Code 4
- Category Code 5
- UDC Code One
- UDC Code Two

- UDC Code Three
- UDC Code Four
- UDC Code Five

Note. Category Code - Change Orders fields 6 through 10 are job-specific user-defined codes.

12. To enter general detail line information, complete any of these fields in the detail area, and click OK:

- Required Days
- Extended Days
- Quote Due Date
- Quote Receive Date
- Chg.Req. Detail Closed

Job Number	Enter the number of the job, or project, that the change request is associated with. This number must be set up in the Business Unit Master table (F0006).
Change Request	Enter the number assigned to the change request for a particular job.
Status Code	Enter a code that indicates the status of the change request. It is for information only and is not attached to a ledger type. This code should not be confused with the status codes that are defined in the Change Request Detail Status Update table (F53101).
Owner Change Req (owner change required)	Enter a code that indicates whether owner approval is required before work can begin on the change request. You can use this code to indicate whether the work is in or out of scope of the original contract. If the work is out of scope, owner approval is required. This field is for reporting purposes only and does not affect the processing of the change request. Values are: <i>Y</i> : Requires owner approval <i>N</i> : Does not require owner approval Blank: The field is ignored
Type	Enter a user-defined code (53/TY) that indicates the type of change request.
Priority Code	Enter a user-defined code (53/PR) that indicates the priority of the change request. For a list of values, click the search button next to the field. Examples of priority codes include: <i>H</i> : High <i>M</i> : Medium <i>L</i> : Low <i>U</i> : Urgent
Column Version	Enter a code that indicates a specific version. A version is a user-defined set of specifications. These specifications control how applications and reports run.

You use versions to group and save a set of user-defined processing option values, data selections, and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must select a version.

Remark	Enter a generic field that you use for a remark, description, name, or address.
Reference 1	Enter any number used to identify a specific source document or originating entry that might be related to a change request.
Originator	Enter the address book number of the person who originated the change request. The system verifies this number against the Address Book.
Requested By	Enter the address book number of the person who initiated the change request.
Resp Manager (responsible manager)	Enter the address book number of the person who approves the change request.
Original Date	Enter the date that an item is scheduled to arrive or that an action is scheduled for completion.
Approval Date	Enter the date on which the person with the appropriate authority approves a requisition.
Planned Start	Enter the date when the item or line of work is to start.
Planned Finish	Enter the date when the item or line of work is to finish.
User Defined Date #1	Enter a user-defined date in Julian format.
Initiated By	Enter a user-defined code (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.
Area	Enter a user-defined code (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.
Category Code 3	Enter a user-defined code (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.
UDC Code One	Enter a user-defined code (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.
Required Days	Enter the number of days required for the change.
Required/Extended Days	Enter the number of days required for the change.
Extended Days	Enter the estimated number of days that the change will extend the work to be performed.
Quote Due Date	Enter the date that a quote is due for a line item in the change request.
Quote Receive Date	Enter the date that a quote is received for a line item in the change request.

Chg.Req. Detail Closed (change request detail closed)	Enter a code that indicates whether a change request detail line, planned change order, or change order is closed. No further action is necessary. Values are: 0: Open 1: Closed
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Entering Cost Account Information

Access the Change Request Entry form.

Note. If the Change Request Entry form does not display the cost fields, click the Display tab and select an option that includes cost accounts. In addition, if you selected accounts by using the Acct Master Pick option on the Form menu, the system completes the Cost Account Number, Cost UM, Cost Description, and Cost G/L Date fields.

If you set the processing options to require account numbers and dates, you must enter account numbers before you can enter amounts and detail status codes.

Cost Sts (cost status)	Enter a user-defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Cost LT (cost ledger type)	Enter a user-defined code (09/LT) that identifies a ledger type.
Cost Original	Enter the original amount for a cost change request detail item.
Cost Quoted	Enter the quoted amount for a detail item for a request for a cost change.
Cost Final	Enter the final amount for a detail item for a request for a cost change.
Cost PT (cost pricing type)	Enter the pricing type associated with cost information. Change requests typically use these pricing types: U: Unit Price Change L: Lump Sum Change
Cost Original Unit Rate	Enter the original cost of a unit rate that is associated with a change request detail line item.
Cost Quoted Unit Rate	Enter the quoted cost of a unit rate that is associated with a change request detail line item.
Cost Final Unit Rate	Enter the final cost for a unit rate that is associated with a change request detail line item.
Cost UM (cost unit of measure)	Enter a user-defined code (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.
Cost Quoted Quantity	Enter the quoted quantity associated with a detail line item for a request for a cost change.
Cost Original Quantity	Enter the original cost quantity for a line item in the change request.

Cost Final Quantity	Enter the final quantity associated with a detail line item for a request for a cost change.
Cost Account Number	Enter the combined business unit, object, and subsidiary portions of an account number.
Cost Description	Enter a description, remark, name or address.
Cost Subledger	Enter a code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so on. If you enter a subledger, you must also specify the subledger type.
Cost SubType	Enter a user-defined code (00/ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system edits the subledger. This can be either hard coded or user-defined. Values include: <i>A</i> : Alphanumeric field. Do not edit. <i>N</i> : Numeric field. Right-justify and zero fill. <i>C</i> : Alphanumeric field. Right-justify and blank fill.
Cost G/L Date (cost general ledger date)	Enter the general ledger date associated with the line item for cost information.
Cost Best to Zero	Enter a code that indicates whether the best cost amount for a detail line item for a change request should be zero.

Entering Revenue Account Information

Access the Change Request Entry form.

Note. If the Change Request Entry form does not display the revenue fields, click the Display tab and select an option that includes revenue accounts. If you selected accounts by using the Acct Master Pick option on the Form menu, the system completes the Revenue Account Number, Revenue UM, Revenue Description, and Revenue G/L Date fields.

Rev Sts (revenue status)	Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Revenue LT (revenue ledger type)	Enter a user-defined code (09/LT) that identifies a ledger type.
Revenue Original	Enter the original amount for a revenue change request detail item.
Revenue Quoted	Enter the quoted revenue amount for a line item in the change request.
Revenue Final	Enter the final revenue amount for a line item in the change request.
Rev TO (revenue terms-only)	Enter a code that specifies whether this change affects contract terms other than price, such as an extension in time or a change in schedule. Values are: <i>Y</i> : Yes, the change does affect terms. <i>N</i> : No, the change does not affect terms.

	If you create a terms-only change request (Rev TO = Y), you do not need to enter a final amount to commit the change request.
Rev PT (revenue pricing type)	Enter the pricing type associated with revenue information. Change requests normally use these pricing types: <i>U</i> : Unit Price Change <i>L</i> : Lump Sum Change
Revenue Original Unit Rate	Enter the original revenue unit rate associated with a change request detail line item.
Revenue Quoted Unit Rate	Enter the quoted revenue unit rate associated with a change request detail line item.
Revenue Final Unit Rate	Enter the final revenue unit rate for a line item in the change request.
Revenue UM (revenue unit of measure)	Enter a user-defined code (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.
Revenue Original Quantity	Enter the original revenue quantity for a line item in the change request.
Revenue Quoted Quantity	Enter the quoted revenue quantity for a line item in the change request.
Revenue Final Quantity	Enter the final revenue quantity for a line item in the change request.
Revenue Cost Account Number	Enter the combined business unit, object, and subsidiary portions of an account number.
Revenue Cost Description	Enter a description, remark, name or address.
Revenue Subledger	Enter a code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so on. If you enter a subledger, you must also specify the subledger type.
Revenue SubType	Enter a user-defined code (00/ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system edits the subledger. This can be either hard coded or user-defined. For example, values include: <i>A</i> : Alphanumeric field. Do not edit. <i>N</i> : Numeric field. Right-justify and zero fill. <i>C</i> : Alphanumeric field. Right-justify and blank fill.
Revenue G/L Date (revenue general ledger date)	Enter the general ledger date associated with the line item for revenue information.
Rev Best to Zero (revenue best to zero)	Enter a code that indicates whether the best revenue amount for a line item in the change request should be zero.
Contract Number	Enter the contract number used in the Contract Billing system. This number, along with the contract type and contract company, provides the link between the Contract Billing and Change Management systems. It will allow you to copy revenue information for a change request into the Contract Billing system.

Contract Type	Enter the contract type tied to a contract in the Contract Billing system. This code is defined in user-defined codes (00/DT). This field, along with the contract number and the contract company, link the change request to the Contract Billing system.
Contract Company	Enter a number that, with the document number, document type and general ledger date, uniquely identifies an original document, such as invoice, voucher, or journal entry. If you use the Next Numbers by Company/Fiscal Year feature, the Automatic Next Numbers program (X0010) uses the document company to retrieve the correct next number for that company. If two or more original documents have the same document number and document type, you can use the document company to locate the desired document.
Contract Change Order	Enter the change number of the contract. The change order number of the base contract is always initialized to 000. Each time you enter a change order for a contract, the system automatically increases the change order number by one. For example, the base contract is the change order number 000, the first change order is 001, the second is 002, and so on.
Owner Number	Enter the address book number to which the system posts billing and accounts receivable transactions.
Contract Commit Flag	Enter a code that indicates whether a detail line item on a change request was committed to the Contract Billing system. The system displays P if the detail line was committed in proof mode, and displays F if the detail line was committed in final mode.
Date Contract Pushed	Enter the date that a revenue detail record was pushed or committed to Contract Billing.

Entering Subcontract Account Information

Access the Change Request Entry form.

Note. If the Change Request Entry form does not display the subcontract fields, click the Display tab and select an option that includes subcontract accounts. If you selected accounts by using the Acct Master Pick option on the Form menu, the system completes the Subcontract Account Number, Subcontract UM, and Subcontract Description fields.

Sub Sts (subcontract status)	Enter a user-defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Subcontract LT (subcontract ledger type)	Enter a user-defined code (09/LT) that identifies a ledger type.
Subcontract Original	Enter the original amount for a subcontract change request detail item.
Subcontract Quoted	Enter the quoted subcontract amount for a line item in the change request.
Subcontract Final	Enter the final subcontract amount for a line item in the change request.

Sub TO (subcontract terms-only)	Enter a code that specifies whether this change affects contract terms other than price, such as an extension in time or a change in schedule. Values are: <i>Y</i> : Yes, the change affects terms. <i>N</i> : No, the change does not affect terms.
Sub PT (subcontract pricing type)	Enter the pricing type associated with subcontract information. Change requests typically use these pricing types: <i>U</i> : Unit Price Change <i>L</i> : Lump Sum Change
Subcontract Original Unit Rate	Enter the original subcontract unit rate for a line item in the change request.
Subcontract Quoted Unit Rate	Enter the quoted subcontract unit rate for a line item in the change request.
Subcontract Final Unit Rate	Enter the final subcontract unit rate for a line item in the change request.
Subcontract UM (subcontract unit of measure)	Enter a user-defined code (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.
Subcontract Original Quantity	Enter the original subcontract quantity for a line item in the change request.
Subcontract Quoted Quantity	Enter the quoted subcontract quantity for a line item in the change request.
Subcontract Final Quantity	Enter the final subcontract quantity for a line item in the change request.
Subcontract Account Number	Enter the combined business unit, object, and subsidiary portions of an account number.
Subcontract Description	Enter a description, remark, name or address.
Subcontract Subledger	Enter a code that identifies a detailed, auxiliary account within a general ledger account. A subledger can be an equipment item number or an address book number. If you enter a subledger, you must also specify the subledger type.
Subcontract SubType	Enter a user-defined code (00/ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system edits the subledger. This can be either hard coded or user-defined. Values include: <i>A</i> : Alphanumeric field. Do not edit. <i>N</i> : Numeric field. Right-justify and zero fill. <i>C</i> : Alphanumeric field. Right-justify and blank fill.
Sub G/L Date (subcontract general ledger date)	Enter the general ledger date associated with the line item for subcontract information.
Sub Best to Zero (subcontract best to zero)	Enter a code that specifies whether the best subcontract amount for a line item in the change request should be zero.

Subcontract Contract No (subcontract contract number)	Enter the contract number used in the Contract Management system. This number, along with the contract type and contract company, provides the link between the Contract Management and Change Management systems. It allows you to copy buyout information for a change request into the Contract Management system.
Subcontract Contract Type	Enter a user-defined code (00/DT) that is associated with a contract in the Subcontract Management system. This field, along with the contract number and the contract company, links the change request to the Subcontract Management system.
Subcontract Order Suffix	Enter the change order number associated with a contract in the Contract Billing system. This field and the contract number, contract type, and company number is used to link the change request to the Contract Billing system. These values must exist in the Contract Header table (F5201).
Subcontract Company	Enter a number that, along with contract number and contract type, uniquely identifies a subcontract.
Subcontract Line No	Enter a number that identifies multiple occurrences (such as line numbers on a purchase order or other document). Generally, the system assigns this number, but in some cases you can override a system-assigned number.
Supplier Number	Enter the address book number of the supplier or subcontractor.
Subcontract Commit Flag	Enter a code that indicates whether a detail line item on a change request was committed to the Subcontract Management system. The system displays P if the detail line was committed in proof mode, and displays F if the detail line was committed in final mode.
Date Subcontract Pushed	Enter the date that a subcontract detail record was committed to the Subcontract Management system.

Entering General Detail Line Information

Access the Change Request Entry form.

Copying Account Balances

This section provides an overview of account balance copying and discusses how to copy account balances.

Understanding Account Balance Copy

You can copy account balances from one amount or unit type (original or quoted) to another when entering or updating detail line items on change requests. For example, after you enter an amount in the Cost Original field, you can copy the amount to the Cost Quoted field and can copy the amount in the Cost Quoted field to the Cost Final field. Copying amounts and units saves data input time and assures that you do not transpose amounts.

When you use the Copy Amounts option on the Form menu, you copy amounts and units for all of the account types and for all of the lines on the change request. For example, suppose that a change request has:

- Two detail lines with cost accounts.
- Two lines with revenue accounts.

- Two lines with both subcontract and revenue accounts.

When you use the Copy Amounts, Original to Quote option from the Form menu, the system copies the amount or units in the Original field to the Quoted field for all six detail lines. Any existing amount in the Quoted field is overwritten with the new amount.

When you use the Copy Amounts option on the Row menu, you copy amounts and units for all of the account types on the line that you select. The system overwrites any existing amounts and units.

Note. The system copies amounts and units only for the account types with columns that are displayed in the detail area. For example, if you display only cost and revenue columns, the system copies amounts for those accounts, but it does not copy amounts for subcontract accounts.

Forms Used to Copy Account Balances

Form Name	Form ID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry. Enter a job number, select to skip to the change request, and click Find. Select the request.	Copy account balances from one amount or unit type (original or quoted) to another.

Copying Account Balances

Access the Change Request Entry form.

1. On Change Request Entry, click the Display tab and select the column types with accounts that you want to copy.
2. Select one of these actions:
 - To copy all account types on all lines, select Copy Amounts from the Form menu, and then select either Original to Quote or Quoted to Final.
 - To copy all account types on a specific line, select the line with which you want to work. From the Row menu, select Copy Amounts, and then select either Original to Quoted or Quoted to Final.

Entering Change Request Fee Calculations

This sections provides an overview of change request fee calculations and discusses how to:

- Set processing options for Change Request Fee Calculations (P5320).
- Enter change request fee calculations.

Understanding Change Request Fee Calculations

After you enter cost information on a change request, you can perform a fee calculation to update revenue amounts. The Change Request Fee Calculation program (P5320) calculates a total amount (quotation total) that is based on the final cost amounts on a change request. Based on the quotation total amount, you can enter a percentage or fixed amount for the system to calculate fees, overhead amounts, or both.

This program updates information in the Change Request Entry program (P5310) with the total amounts, associated account numbers, and status codes. Each total amount is a separate detail line on the Change Request Entry form.

The Change Request Fee Calculation program creates new revenue detail lines for:

- Total of the final cost amounts
- Fee amount
- Overhead amount

If you revise the amounts, the system updates the existing lines that were created the first time that the amounts were entered. Once you enter amounts, you cannot change the account number.

You can also use this program to create fee calculation amounts for each requote.

Forms Used to Enter Change Request Fee Calculations

Form Name	Form ID	Navigation	Usage
Fee Calculation	W5320A	Change Management Setup menu (G5311), Change Request Entry. Enter a job number, click Find, and select the request. Select Fee Calculation from the Form menu.	Enter change request fee calculations.

Setting Processing Options for Change Request Fee Calculation (P5320)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

Status Code

Use this processing option to specify a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Entering Change Request Fee Calculations

Access the Fee Calculation form.

Change Request Entry - fee calculation

OK Cancel Tools

Job Number Birmingham Steel - Memphis

Change Request

Quotation Cost Subtotal

Account Number Total

Status

Fee

Account Number Fee % Fixed Fee Total

Status

OverHead

Account Number Overhead % Fixed Fee Total

Status

Fee Calculation form

- Account Number** Enter the combined business unit, object, and subsidiary portions of an account number.
- Status** Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
- Total** Enter the final revenue amount for a line item in the change request.
- Fee % (fee percent)** Enter the mark-up calculation percentage for a fee.
- Overhead % (overhead percent)** Enter the mark-up calculation percentage for overhead.

Reviewing Change Requests

This section provides an overview of change request review.

Understanding Change Request Review

You can review information about change requests in the Change Management system, and also in the Job Inquiry and Account Inquiry programs.

You can access the Job Status Inquiry program (P512000) from the Change Management system. The Job Status Inquiry program lets you select the information that you want the system to display, and lets you save the selections as column versions. When you save the selections as column versions, the system makes those versions available for you to use repeatedly.

Locating Change Management Information

When reviewing change requests, you often need to locate specific information. The table lists some of the information that you might need to find the form that contains the information:

The detail status code that moves the line item to the approved stage.	Access the Work With Status Codes form (W53101A).
The ledger type that is associated with a detail status code.	Access the Work With Status Codes form. Click Find to display existing codes. Detail status codes: determining associated ledger type Ledgers: determining associated detail status code
The master account that is associated with a line item.	View individual accounts, or all accounts for a change request or job. <ul style="list-style-type: none"> To view the account for a specific line item, on Change Request Entry, select G/L Inquiry from the Row menu. To view accounts for all of the lines in a change request or in a job, select Account Inquiry from the Change Management Inquiries menu (G5312).
The amount type (original, quoted, final, best) that the system is totaling.	Review the Cost, Revenue, Subcontract Totals processing options for the Change Request Entry program.
The approval stage for all change requests for a job.	You can view the detail status codes for cost, revenue, and subcontract accounts. The status codes represent the approval stage of the change request. To view the detail status codes, from the Change Management Inquiries menu (G5312), select Account Inquiry. Complete the job number, and then click Find to display all of the change requests and their codes.
The original, quoted, and final amounts for the change request.	To easily view amounts for all types of accounts on a change request, select Additional Details from the Row menu on Change Request Entry; and view the amounts on the Cost Details, Revenue Details, and Subcontract Details tabs.
The change requests that are not attached to a PCO.	The change requests that are not attached to a planned change order appear on the Change Request Search form. On Planned Change Order Entry, select Select Change Req. from the Form menu; and then click Find on the Change Request Search form. Change requests: unattached

The column versions that are available for change request entry	select Column Versions - User Overrides from the Change Management System Setup menu (G5341). On Work With User Overrides, enter P5310 in the QBE field for Application, and then press Enter.
The invoice number, and to whom funds were paid or received	On Change Request Entry, select a line item; and then select G/L Inquiry from the Row menu.
The original budget for an account	You can compare the original job budget for an account to the amounts that are charged to the account by accessing the account ledger. Select G/L Inquiry from the Row menu, and then select the type of account that you want to view.

See Also

[Chapter 3, “Setting Up the Change Management System,” Setting Up Change Request Detail Status Codes, page 12](#)

PeopleSoft EnterpriseOne Job Cost 8.11 PeopleBook, “Inquiring on Job Information,” Understanding Basic Job Inquiry

PeopleSoft EnterpriseOne Job Cost 8.11 PeopleBook, “Inquiring on Job Information,” Setting Processing Options for Job Status Inquiry - Basic (P512100)

Revising Change Requests

This section provides an overview of change request revision and discusses how to:

- Revise change request amounts manually.
- Generate requotes.

Understanding Change Request Revision

Information in a change request is often revised during the life cycle of the change request. For example, you might change amounts or dates, update status codes, and add lines to a change request. When you revise account distribution information, you can create a requote to record the new information. You use requotes to track and review the history of the changes that are made to the account information. After a detail line has moved through the approval process to its final stage, you can close the line so that no further changes can be made to it.

You can add lines to any change request, even those that have all of the lines closed. When you add or delete line items from change requests, the changes appear in the planned change order (PCO) to which the change request is attached. The system displays a warning message when you make any change to a change request that is attached to a PCO.

Note. You cannot revise a change request that is attached to a closed PCO or CO.

If you commit a subcontract in final mode that is attached to a change request, many of the subcontract fields are disabled to prevent editing.

Revising Amounts

You can revise the amounts in the detail lines on a change request, and you can enter amounts in fields that are not yet completed. You can update or enter amounts either manually or by using the Copy Amounts option. As you revise amounts, you can generate requotes to maintain a copy of each version of the change request.

Requotes

When you change account distribution information in a line on a change request, you can save the change as a new version of the change request. The new version is called a requote. You can use requotes to track changes to the account distribution information in a change request because the system saves each requote. You can view the sequence of requotes for a change request to determine what changes were made and the date when the changes were made.

Requotes save a copy of changes that are made to detail lines. They do not save changes that are made to the header.

Note. You can only change the last requote.

If you have generated more than one requote for a job and change request number, and you want to delete any of them, you must delete the most current requote and then delete each previous requote in the order in which each one was created.

Deleting a requote does not affect any other requotes.

See Also

[Chapter 4, “Creating Change Requests,” Entering Basic Change Requests, page 19](#)

[Chapter 4, “Creating Change Requests,” Copying Account Balances, page 42](#)

[Chapter 4, “Creating Change Requests,” Generating Requotes, page 49](#)

Forms Used to Revise Change Requests or Generate Requotes

Form Name	Form ID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup men (G5311), Change Request Entry. Enter the job number and click Find. Select a change request.	Revise amounts manually. Generate requotes.

Revising Change Request Amounts Manually

Access the Change Request Entry form.

Note. The system does not prevent you from changing an amount for an approved account. If you change an amount for an account that has a detail status code which caused the system to update a ledger, the system updates the ledger with the new amount or makes an adjusting entry to the ledger.

Job Number

Enter the number of the job, or project, that the change request is associated with.

This number must be set up in the Business Unit Master table (F0006).

Cost Original	Enter the original amount for a cost change request detail item.
Cost Quoted	Enter the quoted amount for a detail item for a request for a cost change.
Cost Final	Enter the final amount for a detail item for a request for a cost change.
Revenue Original	Enter the original amount for a revenue change request detail item.
Revenue Quoted	Enter the quoted revenue amount for a line item in the change request.
Revenue Final	Enter the final revenue amount for a line item in the change request.
Revenue Final Quantity	Enter the final revenue quantity for a line item in the change request.
Subcontract Original	Enter the original amount for a subcontract change request detail item.
Subcontract Quoted	Enter the quoted subcontract amount for a line item in the change request.
Subcontract Final	Enter the final subcontract amount for a line item in the change request.

Generating Requotes

Access the Change Request Entry form.

1. On Change Request Entry, make the needed changes to the account distribution information.
2. From the Form menu, select Requotes, and then Generate Requote.

If you update amounts or units using Copy Amounts from either the Form or the Row menu, you must click OK before choosing Requotes from the Form menu.

The system saves the changes and assigns the next sequential number to the requote.

Note. If you make changes to account distribution information, click OK to overwrite the previous information instead of using the Requote function.

CHAPTER 5

Creating Change Management Hierarchy

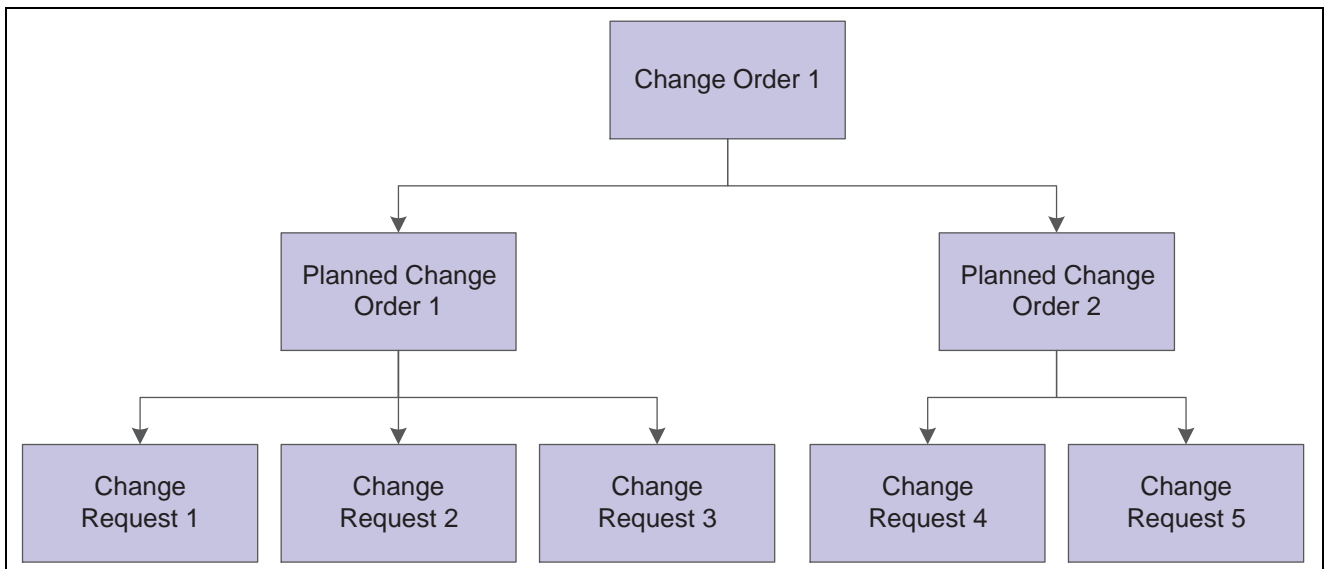
This chapter provides an overview of change management hierarchy creation and status codes for planned changed orders, and discusses how to:

- Work with planned change orders.
- Work with change orders.

Understanding Change Management Hierarchy Creation

If you create many change requests for a job, you might find that keeping track of the change requests or locating information about the changes takes a considerable amount of time. You can make tracking and locating information easier if you attach related change requests to a planned change order (PCO) and attach related PCOs to change orders (COs). When you attach related change requests to PCOs and attach related PCOs to COs, you create a change management hierarchy.

This graphic illustrates a change management hierarchy:



Change management hierarchy

The PCO and CO levels in the hierarchy are optional. If you do not have a lot of change requests, you might not need to create the PCO level. Similarly, if you do not have a lot of PCOs, you might not need to create the CO level.

Locating information is easier when you begin the search at a higher level of the hierarchy because you can search through groups of change requests that are related. For example, if you are tracking changes to a job that consists of constructing a new office building, you might attach all change requests for electrical work to one PCO and attach all change requests for plumbing work to a different PCO. Then, if you need to find information about an electrical contractor, you do not have to search all of the change requests. You know that all of the changes that are related to electrical work are attached to the PCO for electrical work, so you can open that PCO and review only those change requests.

A change management hierarchy also makes tracking monetary amounts for related change requests easier. PCOs display total amounts for the change requests that are attached to them, and COs display total amounts for the PCOs that are attached to them.

See Also

[Chapter 4, “Creating Change Requests,” Organizing Change Requests, page 15](#)

Understanding Status Codes for Planned Change Orders

You can create a planned change order (PCO) by accessing the Planned Change Order Entry program (P5314) or by using the Create PCO option on the Form menu on the Change Request Entry form.

When you create a PCO from Planned Change Order Entry program, you must assign to the PCO a status code other than the status code that indicates that the PCO is approved. You can only assign a status code that indicates that the PCO is approved when you modify the PCO.

When you create a PCO from the Change Request Entry form, the system automatically assigns to the new PCO the status code that indicates that the PCO is submitted.

You define the status code that means that the PCO is approved in Planned Change Order Status Setup. You then specify in a processing option that the system use that status code for approvals.

Note. After you update a PCO to the approved status, the only change you can make to the PCO is to close it. You cannot attach additional change requests or change any header information.

See Also

[Chapter 3, “Setting Up the Change Management System,” Setting Up User-Defined Codes for Change Management, page 11](#)

Working with Planned Change Orders

This section provides an overview of planned change orders and discusses how to:

- Set processing options for the Planned Change Order Entry program (P5314).
- Create a planned change order.
- Attach change requests to a planned change order.
- Attach existing change requests.
- Create and attach new change requests.

- Delete planned change order information.

Understanding Planned Change Orders

A planned change order (PCO) is a grouping of change requests that enables you to track change requests for a job. You create PCOs so that you can attach related change requests to them to make tracking and locating information easier. Attaching related change requests to a PCO also enables you to approve related change requests simultaneously instead of individually accessing the change requests to approve line items on them.

When you create a PCO, you can immediately attach related change requests to it, or you can attach change requests at a later time.

To delete a change request from a PCO, select a change request on the Planned Change Order Entry form, and then select Remove Change Req. from the Row menu. You can delete a change request from a PCO only if the PCO has not been approved or closed.

You can create a planned change order (PCO) and then attach related change requests to it. Attaching change requests to a PCO enables you to:

- Easily locate information about the changes.
- Track amount totals for the change requests.
- Use a global update to move the attached change requests through the approval process.

Understanding Planned Change Order Revision

As change requests move through the approval process, you often need to review information about the change requests. You can more easily review related change requests by reviewing the planned change order (PCO) to which they are attached. After reviewing a PCO and the change requests that are attached to it, you can revise the PCO.

You can revise a PCO until you approve it. After you approve it, the only change you can make to the PCO is to close it. Use a processing option to specify the status code that means the PCO is approved.

When you revise PCOs, you can:

- Add or delete change requests.
- Change all header fields except:
 - The Planned Change Order field.
 - Fields that are uneditable (grayed-out).
 - Close the planned change order.

Understanding Planned Change Order Deletion

You can delete a planned change order (PCO) at any status. If you delete a PCO, the PCO number is removed from any attached change requests.

If you delete a PCO that is approved, these events occur:

- Detail status codes are updated in attached change requests to the values that you specify in either the Windows/Messages-Copy, Unequal, Change, Status program (P53WIN) or in the processing options for Planned Change Order Entry (P5314).

- Any journal entries that were created during the approval process are reversed by the system and recorded to the ledger type that you specify in the Windows/Messages-Copy, Unequal, Change, Status program or in the processing options for Planned Change Order Entry.

Forms Used to Work With Planned Change Orders

Form Name	Form ID	Navigation	Usage
Planned Change Order Entry	W5314B	Change Management Setup menu (G5311), Planned Change Order Entry. On Work With Planned Change Orders, enter a job number and click Add.	Create a planned change order.
Planned Change Order Entry	W5314B	Change Management Setup menu (G5311), Planned Change Order Entry. On Work With Planned Change Orders, enter a job number and click Find.	Attach existing change requests to a PCO when you create the PCO or at a later time. To attach a change request to a PCO, it must have the same job number as the PCO
Planned Change Order Entry	W5314B	Change Management Setup menu (G5311), Planned Change Order Entry. On Work With Planned Change Orders, enter a job number and click Find.	Create a change request and attach it to a PCO without having to first open the Change Request Entry program.

Setting Processing Options for Planned Change Order Entry (P5314)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to specify how the system generates the number for a new change order and to specify whether to create an audit trail.

The status code indicates whether the planned change order is approved and prompts the system to display the Global Status Update form.

The detail status codes change cost, revenue, and subcontract accounts when you run the Global Status Update program.

- 1. Create CO Number** (create change order number) Use this processing option to specify the number the system assigns to a new change order (CO) when you create the change order. This processing option affects only COs that you create when you create a new CO from the Planned Change Order Entry (P5314) program. Values are:

Blank: Use the PCO number. The system uses the number of the first PCO that you attach to the CO as the CO number.

1: Use the next available number.

2. Audit Trail - F0911

Use this processing option to specify how the system creates audit trail records in the Account Ledger table (F0911). This processing option affects changes to account ledgers only when you update the ledgers when you execute a global status update from the Planned Change Order Entry program. Values are:

Blank: Create audit trail records per period change. The system determines if an account ledger record that has the general ledger date of the period end exists. If a record exists, the system updates the record with the new information. If a record does not exist, the system creates a record.

1: Create multiple audit trail records. The system creates new records without determining if other account ledger records exist.

2: Do not create audit trail records.

3. Default PCO Status Code (default planned change order status code)

Use this processing option to specify the default status code to be assigned to a planned change order (PCO). Confirm that the code you enter has been set up in UDC 53/PC (Planned Change Order Status).

4. PCO Approved Status Code (planned change order approved status code)

Use this processing option to specify the status code for an approved planned change order (PCO). When a PCO is at an approved status, the system runs the Global Status Update program. Ensure that the code that you enter has been set up in the user-defined codes for Planned Change Order Status (53/PC).

5. Cost Next Status

Use this processing option to specify the next detail status code for a cost account when the system runs the Global Status Update program. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

6. Revenue Next Status

Use this processing option to specify the next detail status code for a revenue account when the system runs the Global Status Update program. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

7. Subcontract Next Status

Use this processing option to specify the next detail status code for a subcontract account when the system runs the Global Status Update program.

Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

8. Deleted Header Status Code

Use this processing option to specify the updated status code for a change request header when a planned changed order has been deleted. Confirm that the code you have entered has been set up in UDC 53/ST (Status Codes).

9. Deleted Cost Status Code

Use this processing option to specify the updated status code for a cost account when a planned changed order has been deleted. Confirm this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

10. Deleted Revenue Status Code

Use this processing option to specify the updated status code for a revenue account when a planned changed order has been deleted. Confirm this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

- 11. Deleted Subcontract Status Code** Use this processing option to specify the updated status code for a subcontract account when a planned changed order has been deleted. Confirm this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

Versions

Use these processing options to define:

- Which version the system uses when you run the Change Request Entry (P5310), Change Order Entry (P5315), and Planned Change Order Entry (P5314) programs
- Whether the Change Request Entry, Change Order Entry, and Planned Change Order reports contain detailed or summarized information

1. Change Request Entry (P5310) Use this processing option to specify the version that the system uses when you access the Change Request Entry program.

Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. The default version is ZJDE0001.

2. Change Order Entry (P5315) Use this processing option to specify the version that the system uses when you access the Change Order Entry program. Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. The default version is ZJDE0001.

3. Planned Change Order Report Use this processing option to specify whether the system generates the Planned Change Order report as a detail or summary report. Values are:

Blank: Print summarized information on the report.

I: Print detailed information on the report.

Version Use this processing option to specify the version that the system uses when you access the Planned Change Order report. Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. The default version is XJDE0001.

Creating a Planned Change Order

Access the Planned Change Order Entry form.

Planned Change Order Entry - Planned Change Order Entry

OK Find Cancel Form Row Tools

Job Number: 1620 Birmingham Steel - Memphis Change Order: []

Planned Change Order: 6 Foundation Closed Last PCO No.: []

PCO Status Code: 8 Submitted Required/Extended Days: [] []

Requested By: 2428 Escalante, George Submitted Date: []

Resp Manager: [] Approved Date: []

FINAL AMOUNTS Cost: [] Revenue: [] Subcontract: []

QUOTED AMOUNTS Cost: [] Revenue: [] Subcontract: []

Records 1 - 1 Customize Gr

Change Request	Req. No.	Header Description	Status Code	Owner Change	Type	Priority Code	Required Days
[]							

Planned Change Order Entry form

Planned Change Order Enter a number that uniquely identifies a planned change order for a particular job in the Change Management system. The system also links the planned change order number to the change requests attached to the planned change order so that you can identify the change requests that are associated with the planned change order.

If you leave the Planned Change Order field blank, the system assigns a number.

PCO Status Code (planned change order status code) Enter a code that indicates the status of a planned change order.

Header Description Enter a user-defined name or remark.

Requested By Enter the address book number of the person who initiated the change request.

Required/Extended Days Enter the number of days required for the change.

Submitted Date Enter the date that an item is scheduled to arrive or that an action is scheduled for completion.

Approved Date Enter the date on which the person with the appropriate authority approves a requisition.

Attaching Change Requests to a Planned Change Order

After you enter basic information for a planned change order (PCO), you can attach change requests to it. You can add any number of change requests to a PCO. Since all account types on change requests move through the approval process at the same time when you use the global update function, you should carefully consider which change requests you attach to each PCO.

See Also

[Chapter 4, “Creating Change Requests,” Organizing Change Requests, page 15](#)

[Chapter 5, “Creating Change Management Hierarchy,” Creating a Planned Change Order, page 56](#)

Attaching Existing Change Requests

Access the Planned Change Order Entry form.

To attach existing change requests:

1. Select the PCO to which you want to attach a change request and click Select.
2. On Planned Change Order Entry, select Select Change Req. from the Form menu.
3. On Change Request Search, click Find.
4. Select the change request that you want to attach to the PCO and click Select.
5. On Planned Change Order Entry, click OK.

Creating and Attaching New Change Requests

Access the Planned Change Order Entry form.

To create and attach new change requests:

1. Select the PCO to which you want to attach a change request and click Select.
2. On Planned Change Order Entry, select an empty row in the detail area.
3. From the Row menu, select Change Req. Entry.
4. On Change Request Entry, select the master accounts that you want to appear on the change request, complete the fields as needed, and then click OK.

The Change Request Entry form closes and you return to the Planned Change Order Entry form.

5. On Planned Change Order Entry, select Select Change Req. from the Form menu.
6. On Change Request Search, complete the Change Request field in the QBE row with the number of the change request that you created:
7. Select the change request and click Select.

The system adds the change request to the PCO.

See Also

[Chapter 4, “Creating Change Requests,” Entering Basic Change Request Information, page 33](#)

[Chapter 4, “Creating Change Requests,” Understanding Account Distribution Information, page 24](#)

Deleting Planned Change Order Information

You can delete planned change orders or delete change requests from a planned change order.

Deleting Planned Change Orders

Access the Work With Planned Change Orders form.

To delete a planned change order:

1. Find and select a record.
2. Click the Delete button.

Deleting Change Requests

Access the Planned Change Order Entry form.

To delete a change request from a planned change order:

1. Find and select a change request.
2. Select Remove Change Request from the Row menu.

Working with Change Orders

This section provides an overview of change orders and discusses how to:

- Set processing options for Change Order Entry (P5315).
- Create a change order.
- Attach planned change orders to a change order.
- Delete change orders.

Understanding Change Orders

Change orders (COs) are the top level of the Change Management hierarchy. You create COs to group planned change orders (PCOs). COs display amount totals for the PCOs that are attached to them. Attaching PCOs to a CO makes locating information about the PCOs easier.

You create change orders so that you can group planned change orders together.

After you enter basic information for a CO, you can attach PCOs to it. You can attach a PCO regardless of its approval status.

Understanding Change Order Revision

You can revise change orders (COs) until you approve them. After you approve a CO, the only change you can make to the CO is to close it. Use a processing option to specify the status code that means the CO is approved.

When you revise change orders, you can:

- Add or delete planned change orders.
- Change all header fields except:
 - The Change Order Number.
 - Fields that are uneditable (grayed-out).
 - Close the change order.

Forms Used to Work With Change Orders

Form Name	Form ID	Navigation	Usage
Change Order Entry	W5315B	Change Management Setup menu (G5311), Change Order Entry. On the Work With Change Orders form, enter a job number and click Add.	Create a change order.
Change Order Entry	W5315B	Change Management Setup menu (G5311), Change Order Entry. On the Work With Change Orders form, enter a job number and click Find.	Attach planned change orders.

Setting Processing Options for Change Order Entry (P5315)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to specify how audit trail records are created.

The status code indicates whether the change order is approved and prompts the system to display the Global Status Update form.

The detail status codes changes cost, revenue, and subcontract accounts when you run the Global Status Update program.

1. Audit Trail - F0911

Use this processing option to specify how the system creates audit trail records in the Account Ledger table (F0911). This processing option affects changes to account ledgers only when you update the ledgers when you execute a global status update from the Change Order Entry program. Values are:

Blank: Create audit trail records per period change. The system determines if an account ledger record that has the general ledger date of the period end exists. If a record exists, the system updates the record with the new information. If a record does not exist, the system creates a record.

1: Create multiple audit trail records. The system creates new records without determining if other account ledger records exist.

2: Do not create audit trail records.

3. CO Approved Status (change order approved status)

Use this processing option to specify the status code for an approved change order (CO). When a CO is at an approved status, the system runs the Global Status Update program. Ensure that the code that you enter has been set up in the user-defined codes for Change Order Status (53/CS).

4. Cost Next Status

Use this processing option to specify the next detail status code for a cost account when the Global Status Update program is executed. Confirm that

this status code has been setup in the Change Request Detail Status Code Update (P53101) program.

- 5. Revenue Next Status** Use this processing option to specify the next detail status code for a revenue account when the Global Status Update program is executed. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.
- 6. Subcontract Next Status** Use this processing option to specify the next detail status code for a subcontract account when the Global Status Update program is executed. Confirm that this status code has been set up in the Change Request Detail Status Code Update (53101) program.
- 7. PCO Header Status**
(planned change order header status) Use this processing option to specify the PCO header status to which the system changes when you approve a change order. Before you approve the change order, you must confirm that the PCO header status code has been set up in the Planned Change Order Status user-defined codes (53/PC).

Versions

Use these processing options to specify which version the system uses when you access the Planned Change Order Entry program (P5314) and the Change Order report. You also specify whether the associated reports include detailed or summarized information.

- 1. Planned Change Order Entry (P5314)** Use this processing option to specify the version that the system uses when you access the Planned Change Order Entry program (P5314). Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. If you do not specify a version, the system uses version ZJDE0001 for applications, and uses XJDE001 for reports.
- 2. Change Order Report** Use this processing option to specify whether the report should include summarized or detailed information. Values are:
- Blank: Print summarized information on the report.
- I*: Print detailed information on the report.

Version Use this processing option to specify the version that the system uses when you access the Change Order Report (R53450). Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. If you do not specify a version, the system uses version XJDE0001.

Creating a Change Order

Access the Change Order Entry form.

Change Order Entry - Change Order Entry i

OK Find Cancel Form Row Tools

Job Number: 1620 *Birmingham Steel - Memphis*

Change Order: 1 Structure Close Flag Last CO No.: 1

CO Status Code: S Submitted Required/Extended Days: 8 3

Requested By: 2006 Walters, Annette Submitted Date: 08/05/05

Resp Manager: 4802 Fraser, Carol Approval Date:

FINAL AMOUNTS Cost: 103,900.00 Revenue: 96,300.00 Subcontract: 99,000.00

QUOTED AMOUNTS Cost: 205,000.00 Revenue: 92,800.00 Subcontract: 13,500.00

Records 1 - 3 Customize Grid

<input type="checkbox"/>	<input type="checkbox"/>	PCO Number	PCO Description	PCO Sts	Requested By	Submitted Date	Resp Manager	Approved Date
<input type="checkbox"/>	<input type="checkbox"/>	1	Foundation	S	2428	08/05/05		
<input type="checkbox"/>	<input type="checkbox"/>	4	Framing	S	2428	08/05/05		
<input type="checkbox"/>	<input type="checkbox"/>							

Change Order Entry

Change Order Enter a number that uniquely identifies a change order for a particular job in the Change Management system. The system also links the change order number to the planned change orders that are attached to the change order so that you can identify the planned change orders that are associated with the change order.

If you leave the Change Order field blank, the system assigns a number.

CO Status Code (change order status code) Enter a code that indicates the status of a change order.

Requested By Enter the address book number of the person who initiated the change request.

Resp Manager (responsible manager) Enter the address book number of the person who approves the change request.

Required/Extended Days Enter the number of days required for the change.

Submitted Date Enter the date that an item is scheduled to arrive or that an action is scheduled for completion.

Approval Date Enter the date on which the person with the appropriate authority approves a requisition.

Attaching Planned Change Orders to a Change Order

Access the Change Order Entry form.

To attach planned change orders:

1. Select the CO to which you want to attach a PCO and click Select.
2. On Change Order Entry, select Select PCO from the Form menu.
3. On Planned Change Order Search, complete the PCO Number field and click Find.
4. Select the PCO that you want to attach to the CO and click Select.
5. On Change Order Entry, click OK.

See Also

Chapter 5, “Creating Change Management Hierarchy,” Creating a Planned Change Order, page 56

Deleting Change Orders

Access the Change Order Entry form.

To delete a CO:

Select Delete CO from the Form menu. You can delete a CO only if the CO has not been approved or closed.

To delete a PCO from a CO:

Select the PCO on the Change Order Entry form, and then select Remove PCO from the Row menu. You can delete a PCO from a CO only if the CO has not been approved or if it is not closed.

CHAPTER 6

Reviewing Change Requests

This chapter contains an overview of the review process and discusses how to review change requests.

Understanding the Change Request Review Process

As a job moves through the organization's approval process, you might need to review and revise change requests before they are approved. You can review requotes, logs, ledger information, and other information about the change request.

Requotes

When you access the Change Request Entry form, the system displays the current change request. You can view previous values for the change request in the order in which they were created, from the most current version to the oldest, by using the Prior Requote option. After you use the Prior Requote option, you can view the previous versions, from the oldest to the newest, by using the Next Requote option.

Logs

The system automatically creates a log when you commit a subcontract account to the Subcontract Management system. You can review the log and make any necessary changes.

You can select either the Logs Entry program (P4305) or the Log Master Revisions program (P4303) to work with logs. To use the Logs Entry program, you must enter a value of 04 in UDC 40/VF. You must also specify which log program you want to use in the processing options for Change Request Entry (P5310) or Change Request Subcontract Details (P53301).

Accounts

You can view all of the accounts for all change requests for a job by reviewing the Change Request by Account report. When you produce this report you can:

- Specify what information is contained in the report by selecting different report versions in the Change Request Entry processing options.
- Produce this report as a detail or a summary report by setting a processing option.
- Review the report online or print the report.

You can view all accounts on a line to review account details, such as:

- The account number and subledger numbers.
- The original, quoted, final, and best amounts for all accounts.
- The contract number and the supplier.

Information about cost, revenue, and subcontract accounts is on separate tabs to make viewing account numbers and totals easier.

General Ledger Information

You can review general ledger information for each account type on a detail line by using the G/L Inquiry option. The G/L Inquiry option lets you review all general ledger information, including:

- The account number.
- Posted and unposted amounts.
- The original budget for the account.
- The invoice number, purchase order number, and document number.

Change Request for Jobs

You can display the accounts on a change request for a job by the:

- Account type
- Account code
- Ledger type
- Supplier

Specifying how the system displays change request information lets you quickly find the information that you want.

Reviewing Change Requests

This section discusses how to:

- Set processing options for Log Master program (P4305).
- Review quotes.
- Review logs.
- Review accounts for a job.
- Review accounts for a line.
- Review general ledger information.
- Review change requests by job.

Forms Used to Review Change Requests

Form Name	Form ID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry. On Work With Change Requests, enter a job number and click Find. Select a change request.	Review requotes.
Change Management Log Details	W4303F	Change Management Inquiries menu (G5312), select Log Revisions Enter a job number and change request and click Find.	Review logs.
Logs Revisions	W4305A	Change Management Inquiries menu (G5312), select Log master On Work With Logs, find and select a record.	Review logs at five levels.
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry. On Work With Change Requests, enter a job number and click Find. Select a change request.	Review accounts for a job. Review accounts on a line.
Work With Account Ledger	W09200A	On Change Request Entry, select the detail line that you want to review, and then select the appropriate option from the Row menu.	Review general ledger information. You can review Cost G/L, Revenue G/L, and Subcontract G/L information.
Work With Account Change Request Inquiry	W53220A	Change Management Inquiries menu (G5312), Account Inquiry	Review change requests by job

Setting Processing Options for Log Master program (P4305)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

- 1. Contract Type** Use this processing option to specify the default contract type. You must enter a value that has been set up in user-defined code 00/DT.
- 2. Log View Option** Use this processing option to specify the default for the Log View option. You must enter a value that has been set up in user-defined code 43/VO.

Versions

- 1. Progress Payments (P4314)** Use this processing option to define the version of Progress Payments that the system uses to determine how open and outstanding logs are displayed.
When you select a version, review the version’s processing options to ensure that the version meets the needs of the business.

Reviewing Requotes

Access the Change Request Entry form.

On Change Request Entry, select the line item that you want to review, and then select one of the options on the Form menu:

- To review the previous requote for the change request, select Requotes, and then Prior Requote.
- To review requotes for the change request that were created after the original requote, select Requotes, and then Next Requote.

Reviewing Logs

Access the Change Management Log Details form.

Log Revisions - Change Management Log Details

OK Find Delete Cancel Form Row Tools

Job Number Change Request

Records 1 - 2		Customize Grid				
	Log Type	Description	Log Status	Explanation -Remark-	Required Date	Pay Effect
<input checked="" type="radio"/>	T		N	002CR: 00000005		N
<input type="radio"/>						

Change Management Log Details form

Access the Logs Revisions form

Log Master - Logs Revisions

OK Delete Cancel Form Row Tools

Order Number 6082 OS 00050

Records 1 - 2 Customize Grid

Log Type	Description	Explanation -Remark-	Status Code	Pay Effect	Issue Date	Required Date
T	Transmittal	003CR: 00000014	N	N	10/19/04	

Logs Revisions form

See Also

PeopleSoft EnterpriseOne Subcontract Management 8.11 PeopleBook, “Working with Subcontract Logs”

Reviewing Accounts for a Job

To review all accounts for a job:

1. On Change Request Entry, select Prt Summary/Detail from the Form menu.
2. On Report Output Destination, select a destination and click OK.

Reviewing Accounts for a Line

Access the Change Request Entry form.






To review all accounts on a line :

1. On Change Request Entry, select the detail line that you want to review, and then select Additional Details from the Row menu.
2. On Cost, Revenue, Subcontract Details, click the appropriate tabs to review account information.

Reviewing General Ledger Information

Access the Work With Account Ledger form.

Cost Analyzer Account Ledger Inquiry - Work With Account Ledger i ?

Select Find Close Row Tools
    

Options Cost Objects Dates/Display

View Number

Account

Ledger Type General Ledger

No records fetched. Customize Grid

Cost Object 1	Cost Object 1 Description	C T 1	Cost Object Type 1 Description	Cost Object 2	Cost Object 2 Description

Work With Account Ledger form

See Also

PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook, “Reviewing Balances and Transactions,” Reviewing Account Ledgers

Reviewing Change Requests by Job

Access the Work With Account Change Request Inquiry form.

PeopleSoft. Sign Out

Account Inquiry - Work With Account Change Request Inquiry

Find Close Report Row Tools

Job Number Birmingham Steel - Memphis

From Cost Code Small Materials To Cost Code Small Materials

From Cost Type To Cost Type

Supplier Ledger Type

Totals Cost Revenue Subcontract

Records 1 - 2 Customize Grid									
Change Request	Description	Req. No.	Line Number	Cost ST	Cost LT	Cost Account	Cost Original	Cost Quoted	Cost Final
4	Framing Materials		1.000	A	JA	1620.1351.04040020	13,000.00	13,000.00	
8	Roofing Materials		1.000	A	JA	1620.1351.04040020	2,500.00	2,350.00	

Work With Account Change Request Inquiry form

Job Number

Enter the number of the job, or project, that the change request is associated with.

This number must be set up in the Business Unit Master table (F0006).

From Cost Code

Enter a subset of an object account. Subsidiary accounts include detailed records of the accounting activity for an object account.

Note. If you use a flexible chart of accounts and the object account is set to 6 digits, it is recommended that you use all 6 digits. For example, entering 000456 is not the same as entering 456 because if you enter 456 the system enters three blank spaces to fill a 6-digit object.

To Cost Code

Enter a subset of an object account. Subsidiary accounts include detailed records of the accounting activity for an object account.

Note. If you use a flexible chart of accounts and the object account is set to 6 digits, it is recommended that you use all 6 digits. For example, entering 000456 is not the same as entering 456 because if you enter 456 the system enters three blank spaces to fill a 6-digit object.

From Cost Type

Enter the portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories. For example, you can divide the Cost Code for labor into regular time, premium time, and burden.

Note. If you use a flexible chart of accounts and the object account is set to 6 digits, it is recommended that you use all 6 digits. For example, entering 000456 is not the same as entering 456 because if you enter 456 the system enters three blank spaces to fill a 6-digit object.

To Cost Type

Enter the portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories. For example, you can divide the Cost Code for labor into regular time, premium time, and burden.

Note. If you use a flexible chart of accounts and the object account is set to 6 digits, it is recommended that you use all 6 digits. For example, entering 000456 is not the same as entering 456 because if you enter 456 the system enters three blank spaces to fill a 6-digit object.

Supplier

Enter the address book number of the supplier or subcontractor.

Ledger Type

Enter a user-defined code (09/LT) that specifies the type of ledger, such as AA (Actual Amounts), BA (Budget Amount), or AU (Actual Units). You can set up multiple, concurrent accounting ledgers within the general ledger to establish an audit trail for all transactions.

CHAPTER 7

Revising and Approving Change Requests, PCOs, and COs

This chapter provides an overview of revising and approving change requests, planned changed orders (PCOs) and change orders (COs) and discusses how to:

- Work with detail status codes.
- Approve change request accounts, PCOs, and COs.

See Also

[Chapter 4, “Creating Change Requests,” Copying Account Balances, page 43](#)

[Chapter 3, “Setting Up the Change Management System,” Setting Up Change Request Detail Status Codes, page 12](#)

[Chapter 8, “Using Subcontract Information Commitment,” Committing Subcontracts to the Subcontract Management System, page 89](#)

[Chapter 9, “Using Contract Information Commitment,” Committing Contract Information to the Contract Billing System, page 100](#)

Understanding Change Request Revisions and Approvals

Use the PeopleSoft EnterpriseOne Change Management system to track changes to change requests as the requests move through the organization’s approval process. The Change Management system lets you automatically update account ledgers and subcontracts. The system also calculates the best amount.

Change Requests, PCOs, and COs

The organization might require you to periodically review change requests to determine which change requests need to be updated. You might print reports to review, review selected change reports online, or use some other method to review change requests. You can review related change requests by reviewing the PCO to which they are attached. You can also generate PCO reports to review information about the change requests that are attached to the PCO.

As a job progresses, you might make many changes to a change request. For example, you can change the quoted and final amounts for accounts, add or delete line items from a change request, and update detail status codes. When you change account distribution information for a change request, you can create a requote. A requote is a version of the change request. If you make numerous changes to the account distribution information, you might create many requotes. You can use the requotes to review a history of the changes that have been made to the information.

Final Amount

Before you approve a change request, you typically determine a final amount for each account type in the change request. You determine final amounts by completing the Cost Final, Revenue Final, and Subcontract Final fields on the Change Request Entry form. You can complete the fields manually, or you can use the Copy Amounts option from the Form or Row menu.

You do not have to have final amounts to approve a change request; however, each account on each change request that is attached to a PCO must have a final amount before you can approve the PCO. The system requires final amounts when you approve a PCO because the system prompts you to run a global status update for the accounts on the change requests that are attached to the PCO.

Best Amount

You can set up codes for original, quoted, final, and best amounts when you set up detail status codes. The system calculates the best amount, based on whichever of the combinations of original, quoted, and final amounts that you enter for an account type on the Change Request Entry form:

- If a final amount is entered alone or in combination with other any amounts, the final amount is the best amount.
- If a quoted and an original amount are entered but no final amount is entered, the quoted amount is the best amount.
- If only an original amount is entered, the original amount is the best amount.

The system automatically and continuously determines the best amount.

Integration With the Subcontract Management and Contract Billing Systems

You can send information about a subcontract or revenue account on a change request to the relevant contract in the Subcontract Management or Contract Billing systems, respectively, at any time during the approval process. Typically, this action is done after final approval. The information that is used to amend a job's projected final cost, subcontract commitments, and revenue commitments is also retained in the Change Management system.

PCO and CO Approvals

One of the benefits of attaching related change requests to a PCO is that you can approve all of the lines on all of the change requests at the same time. When you approve a PCO, the system displays the Global Status Update form. By completing the fields on the Global Status Update form, you can update the status of some or all of the accounts on the change requests that are attached to the PCO. After you approve a PCO, the only change that you can make to it is to close it.

When you approve a CO, the system displays the Global Status Update form. By completing the fields on the Global Status Update form, you can update the status of some or all of the accounts on the associated change requests. After you approve a CO, you cannot make any changes to it other than closing it.

Close Lines on the Change Request

After you approve the accounts on the detail lines of a change request, you can close the detail lines. Typically, you close the line when all of the accounts on the line are at their final stage in the approval process. After you close a line, you cannot make any modifications to it. You can, however, attach change requests that have closed lines to PCOs.

Closing lines on change requests makes viewing the lines that are still open easier. If you select the Show Open Only option on the Display tab of the Change Request Entry form, the system displays only the lines that are open.

Close PCOs and COs

You can close a PCO when you finish working with the change requests that are attached to it. Typically, you close the PCO when all of the accounts on the attached change requests are at their final stage in the approval process. When you close a PCO, the system closes all of the lines on the attached change requests. After you close a PCO, you cannot make any changes to it.

You can close a CO when you finish working with the PCOs that are attached to it. Typically, you close the CO when you close all of the PCOs that are attached to it. After you close a CO, you cannot make any changes to it.

Working with Detail Status Codes

This section provides an overview of detail status codes and global status updates, and discusses how to:

- Update detail status codes manually.
- Update detail status codes using Global Status Update.
- Close detail lines on change requests.

See Also

[Chapter 3, “Setting Up the Change Management System,” Setting Up Change Request Detail Status Codes, page 12](#)

Understanding Detail Status Codes

As you move a change request through various approval stages, you constantly update its status by using detail status codes. You define detail status codes in the Change Request Detail Status Update Table (F53101).

A detail status code defines the stage in the approval process for each account type (cost, revenue, subcontract) in a line item of a change request. Each account type on a detail line can be at a different approval stage. When you set up detail status codes, you can associate ledger types with the detail status codes that represent later stages in the process. Assigning one of these detail status codes to an account automatically updates the ledger that is associated with the detail status code. Detail status codes have other attributes that are assigned to them to define such things as whether the code represents cost, revenue, or subcontract information; and whether the amount that updates the ledger is the original, quoted, final, or best amount.

Understanding Global Status Updates

You can update the detail status codes for the accounts on change requests individually, or you can use the Global Status Update program (P53WIN) to update them. You access the Global Status Update program from the Form menu on the Change Request Entry, Planned Change Order, or Change Order Entry forms. The system also displays the Global Status Update form when you approve a planned change order (PCO) or a change order (CO). Regardless of whether you access the Global Status Update form from the Change Request Entry program, the Planned Change Order Entry program, or the Change Order Entry program, you use the Global Status Update form to update the detail status codes for the accounts on change requests.

You can change the status of specific types of accounts (cost, revenue, and subcontract). You can change all accounts of a type to the same new status, or change only the accounts that have the same status code to a new status. For example, you can change *all* cost accounts to approved, or you can change to approved only the cost accounts that currently have a status of pending. If you specify that only the cost accounts with a specified status are updated, the system does not update the cost accounts that have a different status.

You can specify the general ledger date that you want to update. The program updates the Account Ledger table (F0911) for all records with the general ledger date that you specify. Leave the G/L field blank to use the system date. If you specify a date, change request detail lines must have the same date.

Specifying Which Accounts to Update

The system changes only the accounts that are at the status that you specify in the From fields to the status specified in the To fields. If you do not complete the From fields with a value other than *, the system changes all accounts to the status that you specify in the To fields. If you do not complete the To field for a specific account type, the system does not change any statuses for that account type.

For example, assume that two cost accounts have a status of Pending Cost Confirmation (detail status code = C) and two cost accounts have a status of Pending Owner Approval (detail status code = P). For this example, assume that the detail status code for an approval is A. If you enter C in the Cost Status From field and enter A in the Cost Status To field, the system updates only the accounts that are pending cost confirmation. If you do not change the detail status code in the Cost Status From field to a value other than *, but do complete the Cost Status To field with an A, the system changes all four accounts to approved. If you do not complete any of the cost status fields and complete only revenue fields, the system changes revenue statuses but does not change any cost statuses.

Update Considerations

When you use the Global Status Update program, you should consider that:

- You must specify in the To column a detail status code for each account type that you want to change to a new code.

For example, if you want to change the detail status code for cost and revenue accounts, you must specify the new code in the To column for the Cost Status and Revenue Status fields. You do not have to specify a detail status code in the Subcontract Status field in the To column if you do not want to change the status of any subcontract accounts.

- You do not have to specify a detail status code in the From column for a specific type of account if you want the system to change the code for all accounts of that type.

For example, if you want the system to change the detail status code for all cost accounts to A, regardless of the current detail status code, you can enter A in the To column for the Cost Status field and leave the wildcard character (*) in the From column.

- You do not have to specify a detail status code in the To column for account types that you do not want to change.

For example, if you do not want to change the detail status code for any revenue accounts, leave the To column for the Revenue Status field blank.

- You can use processing options to specify the default value for the detail status code that you want to apply to each account type.

You can set different values for the Planned Change Order Entry and the Change Order Entry programs. In addition, you can override the default value in the Global Status Update form.

When you use the Global Status Update program, the system:

- Changes the detail status codes to the codes that you specify in the To column for each account type.

You can specify that the system change the detail status code to a code representing approval, or you can specify any other valid detail status code.

- Updates the ledger when you click OK on the Global Status Update form if you change to a detail status code that has a ledger type associated with it.

- Changes all accounts of a type when you do not specify a detail status code in the From column.
For example, if you leave the wildcard character (*) in the From column for the Revenue Status field, the system changes all of the revenue accounts to the status that you specify in the To column for the Revenue Status field.
- Changes only accounts that are at the status specified in the From column when you enter a value in the From column.
- Changes the header status for the change request when you specify a new status in the appropriate Header Status field.

Technical Considerations

Technical considerations to consider:

- The Global Status Update program (P53WIN) does not update the detail status codes for detail lines that are closed or lines that are committed to the Subcontract Management system.
- Every account on every line of all change requests that are attached to a planned change order must have a final amount entered before you can access the Global Status Update program from the Planned Change Order Entry or the Change Order Entry programs.
- You can update the detail status code as often as necessary.

The system does not prevent you from changing the code from approved to another code.

Ledger Updates

If you associate a ledger type with a detail status code, the system updates the ledger when you enter a detail status code in the Global Status Update program or in the Change Request Entry program. If you update the status field with a status code that updates a different ledger, the system updates the second ledger but does not reverse the entry to the first ledger. You must reverse the entry manually.

Forms Used to Update Detail Status Codes

Form Name	Form ID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry. Enter a job number and click Find. Locate and select a job.	Update detail status codes manually.
Global Status Update	W53WINE	Change Management Setup menu (G5311), Change Request Entry Enter a job number, click Find, and select a change request. On the Change Request Entry form, select Global Status from the Form menu.	Update detail status codes using the Global Status Change program.
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry Enter a job number and click Find. Locate and select a job.	Close detail lines on change requests.

Updating Detail Status Codes Manually

Access the Change Request Entry form.

If a different ledger type is associated with the new detail status code, the system updates the appropriate ledgers.

Cost Sts (cost status)	Enter a user-defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902). This field is optional.
Rev Sts (revenue status)	Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902). This field is optional.
Sub Sts (subcontract status)	Enter a user-defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902). This field is optional.

Updating Detail Status Codes Using Global Status Update

Access the Global Status Update form.

Change Request Entry - Global Status Update

OK Cancel Tools

Job Number *Birmingham Steel - Memphis*

CR Number *Foundation Labor*

CR: Updates all status' for each grid row.
 PCO/CO: Updates status' for all attached change requests.

UPDATE STATUSES:	From	To	
Cost Status	<input style="width: 30px;" type="text" value="*"/>	<input style="width: 30px;" type="text" value="A"/>	
Revenue Status	<input style="width: 30px;" type="text" value="*"/>	<input style="width: 30px;" type="text" value="A"/>	
Subcontract Status	<input style="width: 30px;" type="text" value="*"/>	<input style="width: 30px;" type="text" value="A"/>	
Change Req. Header Status	<input style="width: 30px;" type="text" value="*"/>	<input style="width: 30px;" type="text" value="A"/>	<i>Approved Request</i>

G/L Date

Global Status Update form

To update detail status codes using Global Status Update:

1. On Change Request Entry, select Global Status from the Form menu.
2. Complete these fields to specify the status from which you want to change and the status to which you want to change, and then click OK:
 - Status Cost
 - Status Revenue
 - Status Subcontract
 - Status Code

If you leave the default value (*) in the From field for an account type, the system changes all accounts of that type to the detail status code that you specify in the To field.

Status Cost Enter a user-defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Status Revenue Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Status Subcontract	Enter a user-defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Status Code	Enter a code that indicates the status of the change request. It is for information only and is not attached to a ledger type. This code should not be confused with the status codes that are defined in the Change Request Detail Status Update table (F53101).

Closing Detail Lines on Change Requests

Access the Change Request Entry form.

Complete the Chg Req. Detail Closed field for the detail line that you want to close. The system shades the line and makes the fields uneditable

Chg. Req. Detail Closed (change request detail closed)	Enter a code that indicates whether a change request detail line, planned change order, or change order is closed. No further action is necessary. Values are: 0: Open 1: Closed
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Approving Change Request Accounts, PCOs, and COs

This section provides an overview of approving change request accounts, PCOs, and COs, lists prerequisites, and discusses how to:

- Approve individual accounts.
- Approve multiple accounts.
- Approve planned change orders.
- Approve change orders.

See Also

[Chapter 7, “Revising and Approving Change Requests, PCOs, and COs,” Understanding the Approval Process for Change Request Accounts, PCOs, and COs, page 80](#)

[Chapter 7, “Revising and Approving Change Requests, PCOs, and COs,” Understanding Global Status Updates, page 75](#)

[Chapter 7, “Revising and Approving Change Requests, PCOs, and COs,” Approving Planned Change Orders, page 84](#)

Understanding the Approval Process for Change Request Accounts, PCOs, and COs

You approve accounts on change requests, PCOs and COs so that you can move them to the next stage in the organization’s change management process.

Approving accounts on a change request means that you update the detail status code for the account to a status that represents an approval. If you attached ledger types to the detail status codes that represent approval, the system updates the ledgers with the amount and type specified by the detail status code when you approve the change request. If you did not attach ledger types to detail status codes, the organization's approval process might require you to manually update certain ledgers, notify others of the approval, or take some other action.

When you approve PCOs and COs, you move them to the next stage in the approval process. When you approve a PCO, the system automatically changes the status of all accounts on the change requests that are attached to the PCO to the statuses that you specify in the Global Status Update program. When you approve a CO, the system automatically changes the status of the attached PCOs and changes all statuses on the change requests that are attached to the PCOs to the statuses that you specify in the Global Status Update program.

In general, you approve the accounts on a change request and approve PCOs and COs only when you enter final amounts for the accounts and you do not expect any other changes to the accounts.

Approving Accounts on Change Requests

You can approve the accounts on change requests individually, or you can use the Global Status Update program to approve all of the accounts of a specified type on a change request. The method that you use depends on how you organized the change requests and on whether all accounts of a specified type on a change request are ready to be approved at the same time.

If all accounts of a specified type are currently at the same status and are ready to be approved, you can use the Global Status Update program to quickly update all of the accounts to a detail status code that represents approval. If you need to approve only a few accounts, or if not all of the accounts of a certain type are ready to be approved, you should update each account individually.

You can approve the account on a change request by:

- Approving accounts when approving PCOs and COs
- Approving accounts from the Change Request Entry program

Approving Accounts from the Change Request Entry program

You can approve accounts on change requests individually, or you can use the Global Status Update program to approve multiple accounts.

Approving Accounts when Approving PCOs and COs

After you create a PCO and attach change requests to it, you can use several methods to approve the accounts on the change requests. You can individually change the detail status codes for the lines on the change request, or you can approve all of the change requests that are attached to a PCO by approving the PCO or by approving the CO to which the PCO is attached. When you approve the PCO or CO, the Change Management system updates the accounts that are assigned to the status code that you use for approval. Before you can approve a PCO, you must enter final amounts for the change requests that are attached to the PCO.

If all of the accounts for all of the lines on all change requests that are attached to a PCO have final amounts and are ready to be approved, you can update their detail status codes by approving the PCO to which they are attached. If some of the accounts are not ready to be approved or do not have final amounts, individually update the accounts through the Change Request Entry program.

Planned Change Order Approval

You can approve PCOs after all of the information on them is complete. You approve a PCO by changing the status code for the PCO to the code that is specified in the processing options as the code indicating that the PCO is approved.

In general, you change the PCO status to approved only if all of the accounts on the attached change requests are also approved or are ready to be approved when you approve the PCO. Before you can approve a PCO, all of the accounts on all change requests that are attached to the PCO must have a final monetary amount.

When you approve a PCO, the system displays the Global Status Update form. The Global Status Update form lets you specify which account types on the change requests that are attached to the PCO you want to update to an approved status.

Note. After you approve a PCO, you cannot make any changes to it.

Change Order Approval

You can approve COs after all of the information on them is complete. You approve a CO by changing the status code for the CO to the code that is specified in the processing options as the code indicating that the CO is approved.

In general, you change the CO status to approved only if all of the accounts on the change requests that are attached to the PCOs which are attached to the CO are also approved or are ready to be approved. Before you can approve a CO, all of the accounts on all of the attached change requests must have a final monetary amount.

When you approve a change order, the system displays the Global Status Update form. The Global Status Update form lets you specify which account types on the change requests that are attached to the PCOs which are attached to the CO you want to update to an approved status.

Note. After you approve a CO, you cannot make any changes to it.

Prerequisites

Before you complete the tasks in this section:

- Set the PCO Approved Status processing option so that the system recognizes which code you want to use to indicate that a PCO is approved. If you do not set this processing option, the system does not associate which code is associated with an approval and does not prompt you to complete the information for a global status update.
- Set the CO Approved Status processing option so that the system recognizes which code that you want to use to indicate that a CO is approved. If you do not set this processing option, the system does not recognize which code is associated with an approval and does not prompt you to complete the information for a global status update.

Forms Used to Approve Change Request Accounts, PCOs, and COs

Form Name	Form ID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup menu (G5311), Change Request Entry Enter a job number and click Find. Enter a change request and click Select.	Approve individual accounts.
Global Status Update	W53WINE	Change Management Setup menu (G5311), Change Request Entry Enter a job number on the Work With Change Requests form and click Find. Select a change request.	Approve multiple accounts.
Planned Change Order Entry	W5314B	Change Management Setup menu (G5311), Planned Change Order Entry Enter a job number on the Work With Planned Change Orders form and click Find. Locate and select a planned change order.	Approve planned change orders.
Global Status Update	W53WINE	Change Management Setup menu (G5311), Change Request Entry Enter a job number on the Work With Change Orders form and click Find. Locate and select a job.	Approve change orders.

Approving Individual Accounts

Access the Change Request Entry form.

Cost Sts (cost status)

Enter a user-defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Rev Sts (revenue status)

Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Sub Sts (subcontract status) Enter a user-defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Approving Multiple Accounts

Access the Global Status Update form.

To approve multiple accounts:

On Global Status Update, change these fields to reflect the status from which you want to change and the status to which you want to change and click OK:

- Status Cost
- Status Revenue
- Status Subcontract
- Status Code

If you leave the asterisk (*) in the From field for an account type, the system changes all accounts of that type to the detail status code that you specify in the To field.

Cost Sts (cost status) Enter a user-defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Status Revenue Enter a user-defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Status Subcontract Enter a user-defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Status Code Enter a code that indicates the status of the change request. It is for information only and is not attached to a ledger type. This code should not be confused with the status codes that are defined in the Change Request Detail Status Update table (F53101).

G/L Date (general ledger date) Enter a date that identifies the financial period to which the transaction will be posted. You define financial periods for a date pattern code that you assign to the company record. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number, as well as to perform date validations.

If you leave the G/L Date field blank, the system uses the system date. If you specify a date, all of the change requests must have the same date.

Approving Planned Change Orders

Access the Global Status Update form.

To approve planned change orders :

1. On Planned Change Order Entry, update the PCO Status Code to a code that represents that the PCO is approved, and then click OK.
2. On Global Status Update, change these fields to reflect the status from which you want to change and the status to which you want to change, and click OK:
 - Status Cost
 - Status Revenue
 - Status Subcontract
 - Status Code

If you leave the asterisk (*) in the From field for an account type, the system changes all of the accounts of that type to the detail status code that you specify in the To field.

If you leave the G/L Date field blank, the system uses the system date. If you specify a date, all of the change requests must have the same date.

Approving Change Orders

To approve change orders:

1. On Change Order Entry, update the CO Status Code to a code that represents that the CO is approved, and then click OK.
2. On Global Status Update, change these fields to reflect the status from which you want to change and the status to which you want to change, and click OK:
 - Status Cost
 - Status Revenue
 - Status Subcontract
 - Status Code

If you leave the asterisk (*) in the From field for an account type, the system changes all of the accounts of that type to the detail status code that you specify in the To field.

If you leave the G/L Date field blank, the system uses the system date. If you specify a date, all of the change requests must have the same date.

CHAPTER 8

Using Subcontract Information Commitment

This chapter discusses how to:

- Enter subcontract information.
- Commit subcontracts to the Subcontract Management system.
- Modify subcontract logs.

Entering Subcontract Information

This section contains an overview of subcontract information commitment, list a prerequisite, and discusses how to enter subcontract information.

Understanding Subcontract Information Commitment

At any time after you assign a contract number to a subcontract account in a detail line on a change request, you can send the subcontract account information to the appropriate contract in the Subcontract Management system. This update process is known as committing the subcontract account. When you commit a subcontract account, you can either update an existing subcontract line or you can create a new subcontract line.

You usually commit a subcontract account after you have moved it through the approval process. You can only send information from the most recent quote.

It is recommended that you commit subcontract information in proof mode before you commit it in final mode. When you commit subcontract information in proof mode, the system generates a report for you to review but does not update any ledgers. After verifying the information and making any necessary changes, you can commit the subcontract in final mode. After you commit in final mode, you cannot make any changes to the subcontract information in the Change Management system.

Working with Subcontract Information This section provides an overview of subcontract information and discusses how to enter the information.

Subcontract Information

Before you can send subcontract information in a detail line on a change request to the appropriate supplier subcontract in the Subcontract Management system, you must enter information about the subcontract. When you enter the subcontract information, the system adds information about the subcontract account to the Subcontract Details/Commit form. You can view information about the subcontract account and can commit the subcontract to the Subcontract Management system from the Subcontract Details/Commit form.

You can set a processing option to have the system automatically complete contract information.

Prerequisite

Verify that the contract information that you want to enter for a change request exists in the Purchase Order Header table (F4301).

Forms Used to Enter Subcontract Information

Form Name	Form ID	Navigation	Usage
Subcontract Detail Search	W5343SA	<p>Change Management Setup menu (G5311), Change Request Entry.</p> <p>Enter a job number and click Find.</p> <p>Locate and select a job. On Change Request Entry, select Additional Details from the Row menu.</p> <p>On Cost, Revenue, Subcontract Details, select the Subcontract Details tab. Then select Subcontract Mgmt., and then Subcontract Search, from the Form menu.</p>	Enter information for subcontracts.

Entering Subcontract Information

Access the Change Request Entry form.

To enter subcontract information:

1. On Change Request Entry, select the detail line to which you want to add subcontract information.
2. Select Additional Details from the Row menu.
3. On Cost, Revenue, Subcontract Details, click the Subcontract Details tab.
4. From the Form menu, select Subcontract Mgmt., and then Subcontract Search.
5. On Subcontract Detail Search, click Find.
6. Select the subcontract information that you want to add to the detail line, and then click Select.

The subcontract information appears on the Subcontract Details tab.

7. Complete the Subcontract Bill Item Code and click OK.

Subcontract Bill Item Code Enter a category code associated with the Account Master table (F0901). This is a user-defined code (09/01). This field is optional.

Committing Subcontracts to the Subcontract Management System

This section provides an overview of the subcontract commitment process, list prerequisites, and discusses how to:

- Commit subcontracts from the Change Request Entry program.
- Commit subcontracts from the Subcontract Detail/Commit program.
- Set processing options for Change Request for Subcontract Details (P53301).

Understanding the Subcontract Commitment Process

Sending subcontract information to the Subcontract Management system is called committing to the Subcontract Management system. You can commit subcontract accounts from the Change Request Entry program (P5310) or from the Subcontract Details/Commit program (P53301).

You can send subcontract information in a detail line on a change request to the appropriate subcontract in the Subcontract Management system:

- Subcontract account information
- Pricing type
- Quantity
- Unit price
- Unit of measure
- Amount (Final)
- Description
- Terms-only change request

When you commit subcontract accounts from the Change Request Entry program, you can commit only one account at a time. When you commit subcontract accounts from the Subcontract Details/Commit program, you can commit multiple subcontract accounts if you select multiple lines.

Committing in Proof and Final Mode

You can commit in either proof or final mode by setting a processing option. After you commit in final mode, you cannot make any changes to the subcontract or contract information in the Change Management system.

To prevent accidentally committing in final mode, you can set the processing option in the Change Request Entry program to one mode, and set the processing option in the Subcontract Details/Commit or Change Request Revenue Details programs to the other mode. For example, you can set the processing option in the Change Request Entry program to commit subcontracts in proof mode and set the processing option in the Subcontract Details/Commit program to commit in final mode. If you set the programs to different modes and always use one program for committing in proof mode and the other for committing in final mode, you minimize the chance for error.

Committing in proof mode from the Change Request Entry form is recommended because you must make any necessary changes to the account from the Change Request Entry program. After you make any necessary changes, such as updating the detail status code or updating monetary amounts, you can commit the subcontract or contract information. When you commit, the system generates a report that you can review to verify that all amounts and accounts are correct. You can then re-commit and review the new report. When all entries are correct, you can commit in final mode from the Subcontract Detail/Commit or Change Request Revenue Details program.

Detail Status Codes

In general, you commit subcontract or contract information when their respective accounts are approved and when you do not expect any changes to the accounts. Many organizations create a special detail status code for accounts that have been committed in final mode so that they can easily determine which accounts have been committed. You can set the processing option for the status of a submitted subcontract or contract to automatically update the detail status code assigned to a committed account to the special status code.

The Subcontract Amendment Report

The system generates the Subcontract Amendment report when you commit a subcontract account on a detail line on a change request to the Subcontract Management system in either proof or final mode.

You can use the Subcontract Amendment Report from Change Management report as an amendment to a contract. It provides signature lines for approvals.

The Subcontract Amendment Report from Change Management report includes:

- Contract number and type.
- Change number.
- Change request number and amount.
- Date when the subcontract was committed.
- Subsidiary account and object account numbers.

Prerequisites

Before you complete the tasks in this section:

- Verify that the contract number and contract type suffix are entered for the contracts to which you want to send information and that the company and supplier names are entered.
See [Chapter 8, “Using Subcontract Information Commitment,” Entering Subcontract Information, page 87](#).
- Verify that the change request line that you want to commit is open and that the subcontract account includes a final amount.
- Verify that the Subcontract Commit processing options are set.

Forms Used to Commit Subcontracts from the Change Request Entry Program

Form Name	Form ID	Navigation	Usage
Subcontract Detail Search	W5343SA	<p>Change Management Setup menu (G5311), Change Request Entry</p> <p>Locate a job number on the Work With Change Requests form and click Select.</p> <p>Select a record on the Change Request Entry form and then select Additional Details from the Row menu.</p>	Commit subcontracts from the Change Request Entry program.
Subcontract Detail Commit	W53301B	<p>Change Management Setup menu (G5311), Change Request Entry</p> <p>Locate a job number on the Work With Change Requests form and click Select.</p> <p>On Change Request Entry, select Additional Details from the Row menu. On Cost, Revenue, Subcontract Details, select the Subcontract Details tab. Then select Subcontract Mgmt., and then Subcontract Commit from the Form menu.</p>	Commit subcontracts from the Subcontract Detail/Commit program.

Committing Subcontracts from the Change Request Entry Program

Access the Subcontract Details tab on the Cost, Revenue, Subcontract Details form.

From the Form menu, Select Subcontract Mgmt., and then select Subcontract Commit.

Contract	Enter the contract number used in the Subcontract Management system. This number, along with the contract type and contract company, provides the link between the Subcontract Management and Change Management systems. It enables you to copy buyout information for a change request into the Subcontract Management system.
Contract Type	Enter a user-defined code (00/DT) that is associated with a contract in the Subcontract Management system. This field, along with the contract number and the contract company, links the change request to the Subcontract Management system.
Order Co (order contract)	Enter a number that, along with contract number and contract type, uniquely identifies a subcontract.

Committing Subcontracts from the Subcontract Detail/Commit Program

Access the Subcontract Detail form.

Change Request Entry - Subcontract Detail Search

Select Find Close Form Tools

Job Number Birmingham Steel - Memphis

Records 1 - 8 Customize Grid

Line Number	Contract Number	Or Ty	Order Co	Ord Suf	Supplier Number	Supplier Name	Ship To Number	Buyer Number
<input checked="" type="radio"/> 1.000	6082	OS	00050	000	3480	Digger Enterprises	1620	
<input type="radio"/> 2.000	6082	OS	00050	001	3480	Digger Enterprises	1620	
<input type="radio"/> 3.000	6082	OS	00050	002	3480	Digger Enterprises	1620	
<input type="radio"/> 4.000	6082	OS	00050	003	3480	Digger Enterprises	1620	
<input type="radio"/> 1.000	6120	OS	00050	000	3480	Digger Enterprises	1620	
<input type="radio"/> 1.000	6200	OS	00050	000	3480	Digger Enterprises	1620	
<input type="radio"/> 1.000	6218	OS	00050	000	3480	Digger Enterprises	1620	
<input type="radio"/> 1.000	6242	OS	00001	000	4382	PWP Contractor	1620	

Subcontract Detail Search form

To commit from the Subcontract Detail/Commit program:

1. Select the accounts that you want to commit.
2. From the Row menu, select Subcontract Commit.
3. On Subcontract Confirmation, click OK to commit the account.

The system commits the subcontract to the Subcontract Management system. If you commit in final mode, the system changes the detail status code to the code that is specified in the processing options.

Setting Processing Options for Change Request for Subcontract Details (P53301)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Processing

Use these processing options to specify:

- The subcontract change order number and the general ledger account number to which the request will be committed in Subcontract Management

- Whether the system updates Subcontract Management by creating a new line item or by updating an existing line item
- The status code to which the change request will be updated when it is committed
- Whether the program runs in proof or final mode

Commitment Processing: 1. Process Mode	Use this processing option to specify whether the system runs the program in proof or final mode. You should first run the program in proof mode so you can view the report before running it in final mode. When you run the program in final mode, the system updates tables and generates a report. Values are: Blank: Proof mode <i>I</i> : Final mode
Commitment Processing: 2. Subcontract Change Order Number Option:	Use this processing option to specify the subcontract change order number that the system assigns to the change request. Values are: Blank: Use the number from the existing subcontract change order. <i>I</i> : Use the value that you specify in the Subcontract Change Order Number processing option.
Commitment Processing: 3. Subcontract Detail Line Item	Use this processing option to specify how the system updates the Purchase Order Detail table (F4311) when the system commits a change request. Values are: Blank: Create a new line item for a subcontract for the Purchase Order Detail table. <i>I</i> : Update an existing line item for a subcontract for the Purchase Order Detail table. The amount committed replaces the current amount for that line item if no payments have been made.
Commitment Processing: 4. G/L Account	Use this processing option to specify the general ledger account to be used when the system commits a change request. Values are: Blank: Use the existing account. <i>I</i> : Use the account specified in the AAIs for Change Management.
Commitment Processing: 5. Subcontract Status	Use this processing option to specify the detail status code that the system assigns to the change request when it is committed to Subcontract Management. Verify that this status code has been set up in the Detail Status Code Update program.
5a. Audit Trail - F0911	Use this processing option to specify how the system creates audit trail records in the Account Ledger table (F0911). Values are: Blank: Create audit trail records per period change. The system determines whether an account ledger record that has the general ledger date of the period end exists. If a record exists, the system updates the record with the new information. If a record does not exist, the system creates a record. <i>I</i> : Create multiple audit trail records. The system creates new records without determining if other account ledger records exist. <i>2</i> : Do not create audit trail records.

- 6. Terms Only Line Type** Use this processing option to specify a code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces, such as General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management. It also specifies the conditions under which a line prints on reports, and it is included in calculations. For a list of values, click the visual assist button next to the field.

Log Revisions

Use these processing options to specify the log type to use and the function of the pay effect flag when creating Contract Log Revisions.

Commitment Processing:
1. Log Type Use this processing option to specify the log type that the system assigns when you create Contract Log Revisions. For a list of values, click the visual assist button next to the field.

Commitment Processing:
2. Pay Effect Use this processing option to specify the pay effect flag that the system assigns when you create Contract Log Revisions.

Versions

Use this processing option to specify the version that the system uses when you run the Subcontract/Purchase Order Entry program.

Commitment Processing:
1. Subcontract/PO Entry (P4310) Use this processing option to specify the version that the system uses when it commits a change request. The commitment process uses server XT4311Z1, which uses the version that you select for Purchase Orders (P4310).

When you select a version, review the version's processing options to ensure that the version meets the requirements. If you leave this option blank, the systems uses version ZJDE0015.

2. Log Master (P4305) Use this processing option to specify the version for the Logs Entry (P4305) program.

Modifying Subcontract Logs

This section provides an overview of subcontract logs and discusses how to modify a subcontract log for a change request.

Understanding Subcontract Logs

The Change Management system automatically creates a log when you commit a subcontract to the Subcontract Management system in final mode. A log is a record that the system creates so that you can track information that is supplemental to the information in a contract.

The system includes general information in each log, such as log type and log status. A log can also contain either of these types of information to refer to a document or activity:

- Supplier address book number.
- Contract number and contract type from the Subcontract Management system.

Logs can also include other information relevant to the contract, such as meeting dates, notes, and so on.

You can create logs manually or modify logs that the system creates. You can include information such as:

- **Submittals.** A submittal is information that you need to receive from a subcontractor, such as proof of insurance.
- **Transmittals.** A transmittal is information that you need to send to a subcontractor, such as permission to proceed.

You can also add descriptive text about the document or activity.

Log revisions are stored in the Log Master table (F4303). Descriptive text is stored in Media Objects.

You can select either the Logs Entry program (P4305) or the Log Master Revisions program (P4303) to work with logs. To use the Logs Entry program, you must enter a value of 04 in UDC 40/VF. You must also specify which log program you wish to use in the processing options for Change Request Entry (P5310) or Change Request Subcontract Details (P53301).

Change Requests

The Change Management system automatically creates a log when you commit a subcontract to the Subcontract Management system. You can modify the log to add information that is not tracked by the Subcontract Management system. You can also create logs manually.

Forms Used to Modify Subcontract Logs for a Change Request

Form Name	Form ID	Navigation	Usage
Change Management Log Details	W4303F	<p>Change Management Inquiries (G5312), Log Revisions</p> <p>On Change Management Log Details, enter a job number and change request number, then select Log Details from the Form menu.</p> <p>On Log Details, select Change Management from the Form menu.</p>	Modify a log for a change request.

Modifying a Subcontract Log for a Change Request

Access the Change Management Log Details form.

Job Number

Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Change Request	Enter the number assigned to the change request for a particular job.
Log Type	Enter a user-defined code (00/LG) that specifies the type of information in a log entry. The log type is used to group similar types of entries. This field is optional.
Log Status	<p>Enter a code that specifies whether the requirements for the log line have been satisfied. Values are:</p> <p>Blank: The requirements have not been satisfied, the log line is not active, or no status is required.</p> <p><i>Y</i>: Yes, the requirements have been satisfied.</p> <p><i>N</i>: No, the requirements have not been satisfied.</p> <p>This field is optional.</p>
Required Date	Enter the date that the log entry needs to be received. For example, consider a submittal requirement for an insurance certificate. The date that a copy of the policy or certified proof of coverage document is to be received would be entered in the Required Date field. This field is optional.
Pay Effect	<p>Enter a code that indicates whether the submittal requirement is of such importance that regular payments to the subcontractor can be suspended if the submittal requirement is not properly satisfied. This code is normally used in conjunction with submittal log entries. Values are:</p> <p><i>Y</i>: Issue warning messages if log requirements are not met.</p> <p><i>N</i>: Do not issue warning messages.</p> <p>If Pay Effect is set to <i>Y</i>, various warning messages can appear during progress payment entry when outstanding log requirements exist. This field is optional.</p>
Issue Date	Enter the date that the log entry was issued. For example, the effective date for an insurance policy is entered in the Issue Date field. This field is optional.
Expired Date	Enter the expiration date of the log entry. For example, in the case of a submittal requirement for an insurance certificate, the termination date for the policy would be entered in the Expired Date field. The termination date would then be used by the Submittal Status Update program to update the status field. If the Expired Date is earlier than the date that you run the program, the system sets the status to <i>N</i> for the log entry. This field is optional.
Contract Number	Enter a number that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on. This field is optional.
Contract Type	<p>Enter a user-defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. The PeopleSoft system has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>These document types are defined by the system and should not be changed:</p> <p><i>P</i>: Accounts Payable documents</p> <p><i>R</i>: Accounts Receivable documents</p> <p><i>T</i>: Payroll documents</p>

I: Inventory documents

O: Purchase Order Processing documents

J: General Accounting/Joint Interest Billing documents

S: Sales Order Processing documents

This field is optional.

Company

Enter a number that, along with order number and order type, uniquely identifies an order document (such as a purchase order, a contract, a sales order, and so on).

If you use the Next Numbers by Company/Fiscal Year facility, the Automatic Next Numbers program (X0010) uses the order company to retrieve the correct next number for that company. If two or more order documents have the same order number and order type, the order company lets you locate the desired document.

If you use the regular Next Numbers facility, the order company is not used to assign a next number. In this case, you probably would not use the order company to locate the document. This field is optional.

Address Number

Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location. This field is optional.

Category Code 1

Enter a user-defined category code associated with log information. This field is optional.

See Also

PeopleSoft EnterpriseOne Subcontract Management 8.11 PeopleBook, “Working with Subcontract Logs”

CHAPTER 9

Using Contract Information Commitment

This chapter provides an overview of contract information commitments and discusses how to:

- Enter revenue information for contracts.
- Commit contract information to the Contract Billing system.

Understanding Contract Information Commitment

At any time after you assign a contract number to a revenue account in a detail line on a change request, you can send the revenue account information to the appropriate contract in the Contract Billing system. This update process is known as committing the revenue account. When you commit a revenue account, you can either update an existing contract line or you can create a new contract line.

You usually commit a revenue account after you have moved it through the approval process. You can only send information from the most recent quote.

It is recommended that you commit contract information in proof mode before you commit it in final mode. When you commit contract information in proof mode, the system generates a report for you to review but does not update any ledgers. After verifying the information and making any necessary changes, you can commit the contract in final mode. After you commit in final mode, you cannot make any changes to the contract information in the Change Management system.

Entering Revenue Information for Contracts

This section provides an overview of contract information and discusses how to enter revenue information for contracts.

Understanding Revenue Information for Contracts

Before you can send contract information in a detail line on a change request to the appropriate contract in the Contract Billing system, you must enter information about the contract. When you enter the contract information, the system adds information about the corresponding revenue account to the Revenue Details/Commit form. You can view information about the revenue account and can commit the contract to the Contract Billing system from the Revenue Details/Commit form.

You can set a processing option to have the system automatically complete contract information.

Forms Used to Enter Revenue Information for Contracts

Form Name	Form ID	Navigation	Usage
Contract Search	W5310B	Change Management Setup menu (G5311), Change Request Entry Enter a job number and click Find. Locate and select a job.	Enter revenue information for contracts.
Cost, Revenue, Subcontract Details	W5310C	On Change Request Entry, select a detail line, then select Additional Details from the Row menu.	Enter revenue information for contracts.

Entering Revenue Information for Contracts

Access the Change Request Entry form.

To enter revenue information for contracts:

1. On Change Request Entry, select the detail line to which you want to add contract information.
2. Select Additional Details from the Row menu.
3. On Cost, Revenue, Subcontract Details, click the Revenue Details tab.
4. From the Form menu, select Contract Billing, and then Billing Search.
5. On Contract Search, click Find.
6. Select the contract information that you want to add to the detail line, and then click Select.

The contract information appears on the Revenue Details tab.

7. Complete the Rev Bill Item field and click OK.

The revenue details appear in the detail line.

Rev Bill Item

Enter a category code associated with the Account Master table (F0901). This is an optional user-defined code (09/01).

Committing Contract Information to the Contract Billing System

This section provides an overview of the contract commitment process, lists the prerequisite, and discusses how to:

- Commit contracts from the Change Request Entry program (P5310).
- Commit contracts from the Change Request Revenue Details program (P53311).
- Set processing options for Change Request Revenue Details.

Understanding the Contract Commitment Process

Sending contract information to the Contract Billing system is called committing to the Contract Billing system. You can commit revenue accounts from the Change Request Entry program or from the Change Request Revenue Details program (P53311). You can send contract information in a detail line on a change request to the appropriate contract in the Contract Billing system:

- Revenue account information
- Contract information
- Price type
- Quantity
- Unit price
- Unit of measure
- Amount (Final)
- Billing line information
- Terms-only change requests

When you commit revenue accounts from the Change Request Entry program, you can commit only one account at a time. When you commit revenue accounts from the Change Request Revenue Details program, you can commit multiple revenue accounts if you select multiple lines.

Committing in Proof and Final Mode

You can commit in either proof or final mode by setting a processing option. After you commit in final mode, you cannot make any changes to the subcontract or contract information in the Change Management system.

To prevent accidentally committing in final mode, you can set the processing option in the Change Request Entry program to one mode, and set the processing option in the Subcontract Details/Commit or Change Request Revenue Details programs to the other mode. For example, you can set the processing option in the Change Request Entry program to commit subcontracts in proof mode and set the processing option in the Subcontract Details/Commit program to commit in final mode. If you set the programs to different modes and always use one program for committing in proof mode and the other for committing in final mode, you minimize the chance for error.

Committing in proof mode from the Change Request Entry form is recommended because you must make any necessary changes to the account from the Change Request Entry program. After you make any necessary changes, such as updating the detail status code or updating monetary amounts, you can commit the subcontract or contract information. When you commit, the system generates a report that you can review to verify that all amounts and accounts are correct. You can then re-commit and review the new report. When all entries are correct, you can commit in final mode from the Subcontract Detail/Commit or Change Request Revenue Details program.

Detail Status Codes

In general, you commit subcontract or contract information when their respective accounts are approved and when you do not expect any changes to the accounts. Many organizations create a special detail status code for accounts that have been committed in final mode so that they can easily determine which accounts have been committed. You can set the processing option for the status of a submitted subcontract or contract to automatically update the detail status code assigned to a committed account to the special status code.

The Contract Amendment Report

The system generates the Contract Amendment Report (R53480) when you commit a revenue account on a detail line on a change request to the Contract Billing system in either proof or final mode.

You can use the Contract Amendment Report from Change Management report as an amendment to a contract. It provides signature lines for approvals.

The Contract Amendment Report from Change Management report includes:

- Contract number and type.
- Contract total amounts.
- Change request number and amount.
- Date when the contract was committed.
- Subsidiary account and object account numbers.

Prerequisite

Set up contracts in the Contract Billing system. Contracts must have a base contract change order record.

Forms Used to Commit Contracts

Form Name	Form ID	Navigation	Usage
Cost, Revenue, Subcontract Details	W5343SA	Change Management Setup menu (G5311), Change Request Entry Locate a job number on the Work With Change Requests form and click Select. On the Change Request Entry form, select a detail line that you want to commit and then select Additional Details from the Row menu.	Commit contracts from the Change Request Entry program.
Contract Confirmation	W53311B	Change Management Inquiries menu (G5312), Revenue Detail On the Work With Revenue Details/Commit form, locate and select the records you want to commit, and select Commit Billing from the Row menu.	Commit contracts from the Revenue Detail program.

Committing Contracts from the Change Request Entry Program (P5310)

Access the Revenue tab on the Cost, Revenue, Subcontract Details form.

Contract	Enter the contract number used in the Contract Billing system. This number, along with the contract type and contract company, provides the link between the Contract Billing and Change Management systems. It will enable you to copy revenue information for a change request into the Contract Billing system.
Billing Line	Enter the pay item number as defined by the owner. This field is alphanumeric and can be up to 15 characters in length. It is recommended that you use numeric information for this pay item number.
Billing Line Description	Enter additional text that further describes or clarifies an element.

Committing Contracts from the Change Request Revenue Details Program (P53311)

Access the Work with Revenue Details/Commit form.

To commit from the Change Request Revenue Details program (P53311), select Revenue Detail from the Change Management Inquiries menu (G5312).

1. Select one of these options, and click Find:
 - All
 - Committed
 - Uncommitted
2. Select the records you wish to commit and select Commit Billing from the Row menu.
3. On Contract Confirmation, click OK to commit the account.

The system commits the contract to the Contract Billing system. If you commit in final mode, the system changes the detail status code to the code specified in the processing options.

Setting Processing Options for Change Request Revenue Details (P53311)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

1. **Process Mode**

Use this processing option to specify whether the system runs the Contract Commit program in proof or final mode. You should run the program in proof mode before you run it in final mode so that you can view the report that the system generates. After you review the report and make any necessary changes, run the program in final mode. When you run the program in final mode, the system updates the appropriate tables and generates a report. Values are:

 - 0*: Run the program in proof mode.
 - 1*: Run the program in final mode.

2. Status Code Revenue

Use this processing option to specify the detail status code that the system assigns to a contract account in a detail line when you commit the line item to the Contract Billing system. Confirm that the status code has been set up in the Change Request Detail Status Code Update program (P53101). Values are:

A: Approved

B: Best

M: Memo

P: Pending

Q: Quoted

See Also

PeopleSoft EnterpriseOne Contract and Service Billing 8.11 PeopleBook, “Setting Up Table Information,” Understanding Base Rules

APPENDIX A

PeopleSoft EnterpriseOne Change Management Reports

This appendix provides an overview of change management reports and enables you to:

- View summary tables of all reports.
- View report details for selected reports.

Change Management Reports

The Change Management system offers a variety of reports that help you to review and manage the change request information.

Use Change Management reports to review these types of information.

Change requests	<ul style="list-style-type: none">• Detail and summary information• Contract information• Status of each account on a detail line• Account numbers and amounts for each account
Planned change orders	Detail and summary information
Change orders	Detail and summary information
Subcontracts	Log information

PeopleSoft EnterpriseOne Change Management Reports: A to Z

This table lists the change management reports, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation
R53702 PCO/CR (F5314/F5311) Integrity	Print this report to compare final and quoted amounts for cost, revenue, and subcontract records in the Planned Change Order Master Table (F5314) to the attached change requests in the Change Request Detail Table (F5311).	Change Management Reports (G5313), PCO/CR (F5314/F5311) Integrity
R53701 CO/PCO (F5315/F5314) Integrity	Print this report to compare final and quoted amounts for cost, revenue, and subcontract records in the Change Order Master Table (F5315) to the attached planned change orders in the Planned Change Order Master Table (F5314).	Change Management Reports (G5313), CO/PCO (F5315/F5314) Integrity
R43300 Log Report/Update	Print this report to view each log entry and any extended comments for the specified job.	Change Management Reports (G5313), Log Report/Update
R53220P Account Inquiry	Print this report for information from the Change Request Account Inquiry program (P53220).	Change Management Reports (G5313), Account Inquiry
R534011 Change Request Summary	Print this report for a summary of the change request.	Change Management Reports, (G5313), Change Request Summary
R534021 Change Request Details with Contracts	Print this report for detail line information about change requests or quotes.	Change Management Reports (G5313), Change Request Details with Contracts
R53404 Job PCO Summary	Print this report for summary information about totals on the PCOs for a job.	Change Management Reports (G5313), Job PCO Summary
R534041 Job PCO Detail	Print this report for detailed information about PCOs.	Change Management Reports (G5313), Job PCO Detail
R53405 Job CO Summary	Print this report for summary information about the PCOs that are attached to the CO and the change requests that are attached to the PCOs.	Change Management Reports (G5313), Job CO Summary
R534051 Job CO Detail	Print this report for detailed information about change requests:	Change Management Reports (G5313), Job CO Detail
R53411 Change Request Details by Account	Print this report for detail line information about change requests or quotes.	Change Management Reports (G5313), Change Request Details

Report ID and Report Name	Description	Navigation
R53440 Job Planned Change Orders	Print this report for information about totals on the PCOs for a job	Change Management Reports (G5313), Job Planned Change Orders
R53450 Job Change Orders	Print this report for information about the change orders for a job:	Change Management Reports (G5313), select Job Change Orders

PeopleSoft EnterpriseOne Selected Change Management Reports

This section provides detailed information, including processing options, for individual reports. These reports are listed alphanumerically by report ID.

R53702 - PCO/CR (F5314/F5311) Integrity

The PCO/CR (F5314/F5311) Integrity report compares final and quoted amounts for cost, revenue, and subcontract records in the Planned Change Order Master Table (F5314) to the attached change requests in the Change Request Detail Table (F5311) and prints the differences on a report.

This report includes information about discrepancies that occur when more than one currency is used.

R53701 - CO/PCO (F5315/F5314) Integrity

The CO/PCO (F5315/F5314) Integrity report compares final and quoted amounts for cost, revenue, and subcontract records in the Change Order Master Table (F5315) to the attached planned change orders in the Planned Change Order Master Table (F5314) and prints the differences on a report.

This report includes information about discrepancies that occur when more than one currency is used.

R43300 - Log Report/Update

The Log Report/Update report consists of each log entry and any extended comments for the specified job. Extended comments include comments about documents that you need to receive from a subcontractor, or documents or information that you need to give to a subcontractor.

Each log includes:

- Log type
- Description
- Explanation
- Issue, expiration, and required dates

Processing Options for Log Report/Update (R43300)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Print Options

Change Log Status Use this processing option to specify whether you want the system to change unsatisfied, expired logs that have a Pay Effect of *Y* to a Status of *N*. Values are:
I: Change unsatisfied, expired logs that have a Pay Effect of *Y* to a Status of *N*.
 Blank: Do not update the status of the logs.

Print Contract Management Report Use this processing option to specify whether the system prints a contract management report. If left blank, no report will print. Values are:
I: Print contract management report.
 Blank: Do not print report.

Print Associated Log Text Use this processing option to specify whether the system prints associated log text. Values are:
I: Print associated log text.
 Blank: Do not print log text.

R53220P - Account Inquiry

You can use the Account Inquiry Report (R53220P) to review information from the Change Request Account Inquiry program (P53220). This report includes best, original, quoted, and final amounts; change requests, and PCO and CO information. Use the processing options to specify the cost code and cost type ranges, and the ledger type that you want to review.

Processing Options for Account Inquiry (R53220P)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

Although processing options are set up during PeopleSoft EnterpriseOne implementation, you can change processing options each time you run a program.

1. **Default Cost Code Range** From Cost Code
 Use this processing option to display the beginning cost code (subsidiary) account in a range of accounts. Leave this range blank to include all accounts.
 To Cost Code
 Use this processing option to display the ending cost code (subsidiary) account in a range of accounts. Leave this range blank to include all accounts.
2. **Default Cost Type Range** From Cost Type

Use this processing option to display the beginning cost type (object) account in a range of accounts.

To Cost Type

Use this processing option to display the ending cost type (object) account in a range of accounts.

3. Supplier

Use this processing option to specify the supplier that the system uses when printing records for the report. If this processing option is left blank, all suppliers are printed.

4. Ledger Type

Use this processing option to specify the ledger type that the system uses when printing records for the report. If this processing option is left blank, all ledger types are printed.

R534011 - Change Request Summary

You can select one job or multiple jobs for the Change Request Summary report. In addition, you can select the change requests that you want to appear in the report. You can set processing options to specify how the system determines totals for cost, revenue, and subcontract accounts.

For each change request, the Change Request Summary report includes:

- Change request and requote number
- Description
- Required, extended, original, and approved dates
- Totals for cost, revenue, and subcontract accounts
- PCO and CO number and status

Processing Options for Change Request Summary (R534011)

Processing options enable you to specify the default processing for programs and reports.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to specify which amounts (original, quoted, final, or best) that the system uses to calculate totals for cost, revenue, and subcontract accounts.

1. Cost Total

Use this processing option to specify how the system calculates the cost total. Values are:

Blank: Best amounts

1: Original amounts

2: Quoted amounts

3: Final amounts

2. Revenue Total

Use this processing option to specify how the system calculates the revenue total. Values are:

Blank: Best amounts

1: Original amounts

2: Quoted amounts

3: Final amounts

3. Subcontract Total

Use this processing option to specify how the system calculates the subcontract total. Values are:

Blank: Best amounts

1: Original amounts

2: Quoted amounts

3: Final amounts

R534021 - Change Request Details with Contracts

The Change Request Details with Contracts Report lists detail line information for the change requests or requotes that you select. For each change request or requote, the report lists the:

- Change request number
- Description of each line
- Account numbers; and the original, quoted, final, and best amounts for each revenue and subcontract account on a detail line
- Status of each revenue and subcontract account on a detail line
- Contract information for each revenue and subcontract account, including:
 - Contract number and type
 - Owner
 - Supplier
 - Pay item
 - Commitment date
- PCO and CO information, such as:
 - Number
 - Status
 - Submitted and approved dates

R53404 - Job PCO Summary

The Job PCO Summary Report includes information about totals on the PCOs for a job. The report includes the:

- Job number and description
- Change order number and description
- Information about the PCO, including:
 - PCO number and description
 - Status

- Submitted and approved dates
- Authorized amounts for cost, revenue, and subcontract accounts
- Total best amounts for cost, revenue, and subcontract accounts
- Information about the attached change requests, including:
 - Number and description
 - Original, quoted, and final amounts for cost, revenue, and subcontract accounts
 - Total of the best amounts for cost, revenue, and subcontract accounts

R534041 - Job PCO Detail

The Job PCO Detail Report contains information about PCOs:

- Job number and description
- Information about the PCO, including:
 - PCO number and description
 - Status
 - Submitted and approved dates
- Information about the change requests that are attached to the PCO, including:
 - Original, quoted, and final amounts for the cost, revenue, and subcontract accounts
 - Amount totals for the accounts on the change requests

R53405 - Job CO Summary

The Job CO Summary Report includes information about the PCOs that are attached to the CO and the change requests that are attached to the PCOs. This report includes:

- The CO authorized amount total for cost, revenue, and subcontract accounts
- The PCO approved, quoted, and final totals for cost, revenue, and subcontract accounts
- The best amount totals for the CO and for the job

R534051 - Job CO Detail

The Job CO Detail Report includes information about change requests:

- Job number and description
- Information about the CO, including:
 - CO number and description
 - Status
 - Submitted and approved dates
 - Total of authorized amounts for cost, revenue, and subcontract accounts
- Information about the planned change orders that are attached to the CO, including:
 - PCO number and description

- PCO approved amounts for cost, revenue, and subcontract accounts
- Information about the change requests that are attached to the PCO, including:
 - Change request number and description
 - Quoted and final amounts for the cost, revenue, and subcontract accounts

R53411 - Change Request Details by Account

The Change Request Details by Account Report includes detail line information for the change requests or quotes that you select. For each change request or quote, the report includes:

- Change request number
- Description of each line
- Account numbers
- Original, quoted, and final amounts for each account on a detail line
- Status of each account on a detail line
- Total of best amounts for cost, revenue, and subcontract accounts
- PCO and CO information, such as:
 - Number
 - Status
 - Submitted and approved dates

R53440 - Job Planned Change Orders

The Job Planned Change Orders Report includes information about totals on the PCOs for a job. The report includes:

- Job number and description
- Information about the PCO, including:
 - PCO number and description
 - Status
 - Submitted and approved dates
 - Quoted and approved totals for the cost, revenue, and subcontract accounts

R53450 - Job Change Orders

The Job Change Orders Report includes information about the change orders for a job:

- Change order number and description
- Status
- Submitted and approved dates
- The quoted and approved totals for the cost, revenue, and subcontract accounts for each CO

Glossary of PeopleSoft Terms

activity	A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.
activity rule	The criteria by which an object progresses from one given point to the next in a flow.
add mode	A condition of a form that enables users to input data.
Advanced Planning Agent (APAg)	A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of relational databases, flat file format, and other data or message encoding, such as XML.
application server	A server in a local area network that contains applications shared by network clients.
as if processing	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
alternate currency	<p>A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.</p> <p>In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.</p>
as of processing	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
back-to-back process	A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.
batch processing	<p>A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.</p> <p>In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.</p>
batch server	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
batch-of-one immediate	<p>A transaction method that enables a client application to perform work on a client workstation, 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.</p> <p>See also direct connect and store-and-forward.</p>
business function	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable 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	See named event rule (NER).
business view	A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
charts	Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software.
connector	Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in PeopleSoft EnterpriseOne Financial Management that is 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 in PeopleSoft EnterpriseOne General Accounting.
Control Table Workbench	An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
cost assignment	The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead).
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.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	An application that, during the Installation Workbench process, copies all 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.

date pattern	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
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 information	Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate and store-and-forward.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
edit code	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
Employee Work Center	A central location for sending and receiving all PeopleSoft 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.
enterprise server	A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.
EnterpriseOne object	A reusable 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.
EnterpriseOne process	A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
Environment Workbench	An application that, during the Installation Workbench process, 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.
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.

event rule	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
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. A facility is sometimes referred to as a <i>business unit</i> .
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	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.
interface table	See Z tables.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interoperability model	A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.
in-your-face-error	In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
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.
jargon	An alternative data dictionary item description that PeopleSoft EnterpriseOne or People 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. This server provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that enables heterogeneous servers to access each other's data.
JDEBASE Database Middleware	A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.
JDEIPC	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log	The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne.
JDENET	PeopleSoft proprietary communications middleware package. This package 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 PeopleSoft EnterpriseOne supported platforms.
Location Workbench	An application that, during the Installation Workbench process, 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.
logic server	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs.
MailMerge Workbench	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
master business function (MBF)	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
master table	See published table.
matching document	A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
media storage object	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
message center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.
messaging adapter	An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.
messaging server	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
named event rule (NER)	Encapsulated, reusable business logic created using event rules, rather than C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
<i>nota fiscal</i>	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
<i>nota fiscal factura</i>	In Brazil, a nota fiscal with invoice information. See also <i>nota fiscal</i> .

Object Configuration Manager (OCM)	In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
Object Librarian	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
Object Librarian merge	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
Open Data Access (ODA)	An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.
Output Stream Access (OSA)	An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
package	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 on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server.
package build	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build. Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”
package location	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
Package Workbench	An application that, during the Installation Workbench process, 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.
PeopleSoft Database	See JDEBASE Database Middleware.
planning family	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
preference profile	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
print server	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
pristine environment	A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
production environment	A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.
production-grade file server	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.
project	In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
promotion path	<p>The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):</p> <p>11>21>26>28>38>01</p> <p>In this path, <i>11</i> equals new project pending review, <i>21</i> equals programming, <i>26</i> equals QA test/review, <i>28</i> equals QA test/review complete, <i>38</i> equals in production, <i>01</i> equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.</p>
proxy server	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
published table	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne 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 F98DRPCN table.
QBE	An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
real-time event	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.
refresh	A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
replication server	A server that is responsible for replicating central objects to client machines.
quote order	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, 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.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	<p>Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.</p> <p>For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpriseOne systems.</p>
table access management (TAM)	The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-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	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing	The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.
three-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
transaction processing (TP) 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 may include programs that validate data and format terminal screens.
transaction set	An electronic business transaction (electronic data interchange standard document) made up of segments.
trigger	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
triggering event	A specific workflow event that requires special action or has defined consequences or resulting actions.
two-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
User Overrides merge	Adds new user override records into a customer's user override table.
variance	In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment. In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.
Version 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.
visual assist	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
vocabulary override	An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.
wchar_t	An internal type of a wide character. It is used for writing portable programs for international markets.
web application server	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
web server	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
Windows terminal server	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

work day calendar	In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
workflow	The automation of a business process, in whole or in 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 server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
XAPI events	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.
XML CallObject	An interoperability capability that enables you to call business functions.
XML Dispatch	An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.
XML List	An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.
XML Service	An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.
XML Transaction	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.
XML Transaction Service (XTS)	Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.
Z event	A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.
Z table	A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Interface tables also can be used to retrieve PeopleSoft EnterpriseOne data. Interface tables are also known as interface tables.
Z transaction	Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.

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