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JD Edwards EnterpriseOne Work Orders 9.0 Implementation Guide

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JD Edwards EnterpriseOne Work Orders 9.0 Implementation Guide
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About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and downloading documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

Note. Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an 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 fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

JD Edwards EnterpriseOne Application Prerequisites

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

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

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, 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 JD Edwards EnterpriseOne applications most effectively.

Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne 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 implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. 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 implementation guides. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Downloading Documentation

This section discusses how to:

- Obtain documentation updates.
- Download documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading Documentation

In addition to the complete line of documentation that is delivered on your implementation guide CD-ROM, Oracle makes JD Edwards EnterpriseOne documentation available to you via Oracle's website. You can download PDF versions of JD Edwards EnterpriseOne documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps

Resource	Navigation
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release 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
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 implementation guides:

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.
Italics	Indicates field values, emphasis, and JD Edwards EnterpriseOne 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 *O*.
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.
. . . (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

Implementation guides contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne 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

Implementation guides 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 implementation guides:

- 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 implementation guides:

- 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 implementation guides and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Fields Used in Implementation Guides

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 enables 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:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: 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*.

U: 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. JD Edwards 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. JD Edwards 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.

JD Edwards EnterpriseOne Work Orders Preface

This preface discusses:

- JD Edwards EnterpriseOne products.
- JD Edwards EnterpriseOne application fundamentals.
- Common fields used in this implementation guide.

JD Edwards EnterpriseOne Products

This implementation guide refers to the JD Edwards EnterpriseOne Work Order Management product from Oracle.

JD Edwards EnterpriseOne Application Fundamentals

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 JD Edwards EnterpriseOne product lines:

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

- *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*
- *JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation Guide*
- *JD Edwards EnterpriseOne Fixed Assets 9.0 Implementation Guide*
- *JD Edwards EnterpriseOne General Accounting 9.0 Implementation Guide*
- *JD Edwards EnterpriseOne Tools 8.98 Foundation Guide*

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

See Also

JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide, "JD Edwards EnterpriseOne Address Book Preface"

JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation Guide, "JD Edwards EnterpriseOne Financial Management Application Fundamentals Preface"

JD Edwards EnterpriseOne Fixed Assets 9.0 Implementation Guide, "JD Edwards EnterpriseOne Fixed Assets Preface"

JD Edwards EnterpriseOne General Accounting 9.0 Implementation Guide, "JD Edwards EnterpriseOne General Accounting Preface"

Common Fields Used in This Implementation Guide

Asset Number

Enter an identification code that represents an asset. You enter the identification code in one of these formats:

1: Asset number (a computer-assigned, 8-digit, numeric control number).

2: Unit number (a 12-character alphanumeric field).

3: Serial number (a 25-character alphanumeric field).

Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character that you enter indicates whether you are entering the primary (default) format that is defined for the system or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format that you are using. You assign special characters to asset number formats on the fixed assets system constants form.

Business Unit

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.

Customer Number

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

CHAPTER 1

Getting Started with JD Edwards EnterpriseOne Work Orders

This chapter discusses:

- JD Edwards EnterpriseOne Work Orders overview.
- JD Edwards EnterpriseOne Work Orders integrations.
- JD Edwards EnterpriseOne Work Orders implementation.

JD Edwards EnterpriseOne Work Orders Overview

JD Edwards EnterpriseOne Work Orders enables you to integrate all aspects of creating and processing work orders with the rest of the business operations. It is specifically designed to handle small, short-term tasks that are part of a major project. It is also designed for quick setup, simple cost accounting, and basic scheduling for projects that can be completed quickly. You can use Work Orders to keep these projects as organized and well-managed as the long-term projects.

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

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

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

Regardless of the terminology, the concept is the same. Generating a work order is the activity that starts the process of completing a task. The work order identifies the work that needs to be done, and the information that it collects captures the history of the work that is performed. You use work orders to track:

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

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

See Also

JD Edwards EnterpriseOne Capital Asset Management 9.0 Implementation Guide, "Setting Up Work Orders"

JD Edwards EnterpriseOne Work Orders Integrations

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

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

JD Edwards EnterpriseOne Work Orders integrates with these JD Edwards EnterpriseOne systems from Oracle:

- JD Edwards EnterpriseOne Address Book.
- JD Edwards EnterpriseOne General Accounting.
- JD Edwards EnterpriseOne Payroll and Human Capital Management.
- JD Edwards EnterpriseOne Inventory Management.
- JD Edwards EnterpriseOne Procurement.
- JD Edwards EnterpriseOne Accounts Payable.
- JD Edwards EnterpriseOne Capital Asset Management.
- JD Edwards EnterpriseOne Job Cost.
- JD Edwards EnterpriseOne Service Billing.

JD Edwards EnterpriseOne Address Book

Every JD Edwards EnterpriseOne system works with the JD Edwards EnterpriseOne Address Book system to retrieve up-to-date employee, supplier, and other applicable name and address information.

JD Edwards EnterpriseOne General Accounting

When you enter work order transactions (including billing transactions), you must process them through the general ledger.

You enter all statistical values, such as miles, gallons, and hours into the general ledger.

When you charge a job for equipment use, the system searches the Account Master for the appropriate rate and account to bill.

JD Edwards EnterpriseOne Payroll and Human Capital Management

You can:

- Enter equipment time for billing purposes.
- Charge for labor that is associated with operating or repairing equipment.
- Charge to a work order or a work order / labor routing step depending on level of detail required by using a specific labor routing step.

JD Edwards EnterpriseOne Inventory Management

You can:

- Track and take inventory of repair parts.
- Attach parts lists to work orders.

JD Edwards EnterpriseOne Procurement

You can create purchase orders directly from the work order parts list and from other maintenance planning functions.

A purchase order includes the equipment number, which the system automatically enters in related forms and tables.

JD Edwards EnterpriseOne Accounts Payable

You can enter work order charges through the Accounts Payable system.

JD Edwards EnterpriseOne Capital Asset Management

You can maintain and service equipment to reduce downtime and repair costs. You can track the revenue, cost, and use of the assets, and you can use workflow alerts to plan and resolve issues before they become emergencies.

JD Edwards EnterpriseOne Job Cost

You can use job cost to assist you in managing the projects and jobs, and to monitor the costs and revenues that are associated with them.

JD Edwards EnterpriseOne Service Billing

Enables you to generate and print invoices for contracts, work orders, and cases.

JD Edwards EnterpriseOne Work Orders Implementation

This section provides an overview of the steps that are required to implement JD Edwards EnterpriseOne Work Orders.

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

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne Work Orders, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time that is required to search for and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools 8.98 Software Update Guide*

JD Edwards EnterpriseOne Work Orders Global Implementation Steps

This table lists the suggested global implementation steps for Work Orders:

Step	Reference
1. Set up global user-defined codes.	*JD Edwards EnterpriseOne Tools 8.98 System Administration Guide, "Working with User Defined Codes"*
2. Set up companies, fiscal date patterns, and business units.	*JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation Guide*, "Setting Up Organizations"
3. Set up next numbers.	*JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation Guide*, "Setting Up Next Numbers"
4. Set up accounts, and the chart of accounts.	*JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation Guide*, "Creating the Chart of Accounts"
5. Set up the General Accounting constants.	*JD Edwards EnterpriseOne General Accounting 9.0 Implementation Guide*, "Setting Up the General Accounting System"
6. Set up multicurrency processing, including currency codes and exchange rates.	*JD Edwards EnterpriseOne Multicurrency Processing 9.0 Implementation Guide*, "Setting Up General Accounting for Multicurrency Processing" and *JD Edwards EnterpriseOne Multicurrency Processing 9.0 Implementation Guide*, "Setting Up Exchange Rates"
7. Set up ledger type rules.	*JD Edwards EnterpriseOne General Accounting 9.0 Implementation Guide*, "Setting Up the General Accounting System," Setting Up Ledger Type Rules for General Accounting
8. Enter address book records.	*JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Entering Address Book Records"
9. Set up inventory information such as branch/plant constants, default locations and printers, manufacturing and distribution AAIs, and document types.	*JD Edwards EnterpriseOne Inventory Management 9.0 Implementation Guide*, "Setting Up the Inventory Management System"
10. Set up shop floor calendars.	*JD Edwards EnterpriseOne Shop Floor Management 9.0 Implementation Guide*, "Setting Up Shop Floor Management"
11. Set up manufacturing constants.	*JD Edwards EnterpriseOne Product Data Management 9.0 Implementation Guide*, "Setting Up Product Data Management"

Implementation Steps for Work Orders

This table lists the suggested application-specific implementation steps for JD Edwards EnterpriseOne Work Orders:

Step	Reference
1. Set up user-defined codes for work orders.	Chapter 3, "Setting Up the Work Order System," Understanding User-Defined Codes for Work Orders, page 11
2. Set up accounting rules for work orders.	Chapter 3, "Setting Up the Work Order System," Setting Up Accounting Rules for Work Orders, page 32
3. Set up approvals for work orders.	Chapter 3, "Setting Up the Work Order System," Defining Approval Routes, page 23
4. Set up default managers and supervisors.	Chapter 3, "Setting Up the Work Order System," Setting Up Default Managers and Supervisors, page 16
5. Set up record type formats.	Chapter 3, "Setting Up the Work Order System," Setting Up Record Type Formats, page 25
6. Set up standard procedures.	Chapter 3, "Setting Up the Work Order System," Setting Up Standard Procedures, page 13
7. Set up supplemental data for work orders.	Chapter 3, "Setting Up the Work Order System," Setting Up Supplemental Data for Work Orders, page 26
8. Set up activity rules for work orders.	Chapter 3, "Setting Up the Work Order System," Setting Up Activity Rules for Work Orders, page 18

CHAPTER 2

Understanding Work Orders

This chapter provides an overview of work orders and discusses:

- Work order management features.
- Work order tables.

Work Order Management Features

This section discusses:

- Quick creation of work orders.
- Approvals for work orders.
- Activity rules for work orders.
- Project setup and tracking.
- Project management reporting flexibility.

Quick Creation of Work Orders

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

Approvals for Work Orders

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

Activity Rules for Work Orders

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

- Whether the work order is active or inactive at a particular status.

- Whether and when to lock the work order to prevent changes.

Paperless Processing

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

Quick Location of Work Orders

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

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

Simple Budget and Estimate Controls

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

Multiple Control Dates

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

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

Multiple Levels of Responsibility

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

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

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

Unlimited Narrative Remarks

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

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

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

Project Setup and Tracking

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

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

Project Management Reporting Flexibility

You can manage projects using these reports:

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

Work Order Tables

These tables are used in Work Orders:

Table	Description
Next Numbers (F0002)	Assigns a unique number to each work order that you create.
User Defined Codes (F0005)	Stores valid user defined system codes and descriptions.
Business Unit Master (F0006)	Stores job and business unit information.
Generic Message/Rates (F00191)	Stores general instructions that relate to a work order.
Address Book Master (F0101)	Contains name and address information for the customer, manager, originator, and supervisor.
Account Master (F0901)	Contains the chart of accounts information.
Account Balances (F0902)	Stores balances by account and by work order. It also stores information by ledger type and fiscal year.
Account Ledger (F0911)	Stores amount and unit information for each work order. The work order information is stored as a subledger with a subledger type of W.
Work Order Default Coding File (F48001)	Stores default manager and supervisor codes for work orders by category codes 01 through 03.
Work Order Record Types File (F48002)	Contains the valid work order record types. It stores header information for the Work Order Instruction (F4802) table.
Work Order Master File (F4801)	Stores information about a work order, such as the description, estimated hours, responsibility, and costing information. It also stores planned start and end dates. This table contains one record for each work order.
Work Order Instructions File (F4802)	Stores description text and the various record types that are defined in the user defined codes, such as Description of Request and Final Disposition. This table contains one record per line of instruction.
W.O. Status Action Table (F4826)	Stores activity rules that relate to a work order.
Work Order Approval Routing (F4827)	Stores rejection status of work orders.

CHAPTER 3

Setting Up the Work Order System

This chapter provides an overview of user-defined codes for work orders and discusses how to:

- Set up standard procedures.
- Set up default managers and supervisors.
- Set up activity rules for work orders.
- Set up record type formats.
- Set up supplemental data for work orders.
- Set up accounting rules for work orders.

Understanding User-Defined Codes for Work Orders

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

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

Type Codes (00/TY)

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

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

Priority Codes (00/PR)

Use these codes to group work orders by priority, such as urgent or low. The system displays this classification code field in the Work with Work Orders program.

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

When you display work orders using the Work with Work Orders program, the Priority processing option on the Process tab controls whether the program displays the Priority field in a specific color. The values for the colors, which are hard-coded in the Special Handling field of UDC 00/PR, are:

- *1:* Red
- *2:* Yellow
- *3:* Blue

Status Codes (00/SS)

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

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

Category Code 01 (00/W1)

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

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

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

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

Category Codes (00/W2 - 00/W0)

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

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

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

- Operator error.
- Design flaw.
- Lubrication or cooling problem.

Detail Specifications Codes (00/RT)

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

- Tool and equipment instructions.
- Safety provisions.
- Equipment downtime.

Work Order Databases (00/WD)

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

Setting Up Standard Procedures

This section provides an overview of standard procedures and discusses how to:

- Set processing options for Generic Message/Rates Records (P00191).
- Define standard procedures for work orders.

Understanding Standard Procedures

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

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

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

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

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

Forms Used to Set Up Standard Procedures

Form Name	FormID	Navigation	Usage
Work With Generic Message/Rate Types	W00191A	Use one of these navigations: • Work Order Setup (G4841), Standard Procedures • Product Data Management Setup (G3041), Std. Procedure Descriptions • Shop Floor Management Setup (G3141), Standard Procedures	Review standard procedures for Work Orders, Product Data Management, and Shop Floor Management.
Enter Generic Message/Rates	W00191D	On Work With Generic Message/Rate Types, click Add.	Set up standard procedures. On Enter Generic Message/Rates, enter a code and description on the first available blank line.
General Message	W00191E	On Enter Generic Message/Rates, select the record, and then select General Message from the Row menu.	Add message text to standard procedure.
Standard Text Search	W00192SC	On General Message, select Search from the Row menu. Locate the message number, select the rows of text to copy, and click Select.	Copy message text from one procedure to another

Setting Processing Options for Generic Message /Rates Records (P00191)

Use these processing options to supply the default values for the Generic Message/Rates Records program.

Defaults

1. System Code Enter a user-defined code (98/SY) that identifies a system. Values include:

01: Address Book

03B: Accounts Receivable

04: Accounts Payable

09: General Accounting

11: Multicurrency

2. Record Type Enter a code that identifies the table that contains user-defined codes. The table is also referred to as a UDC type.

Display

1. Text Type

Specify the type of text that the system displays. Values are:

1: Rate text

2: Message text

2. Text Column Display

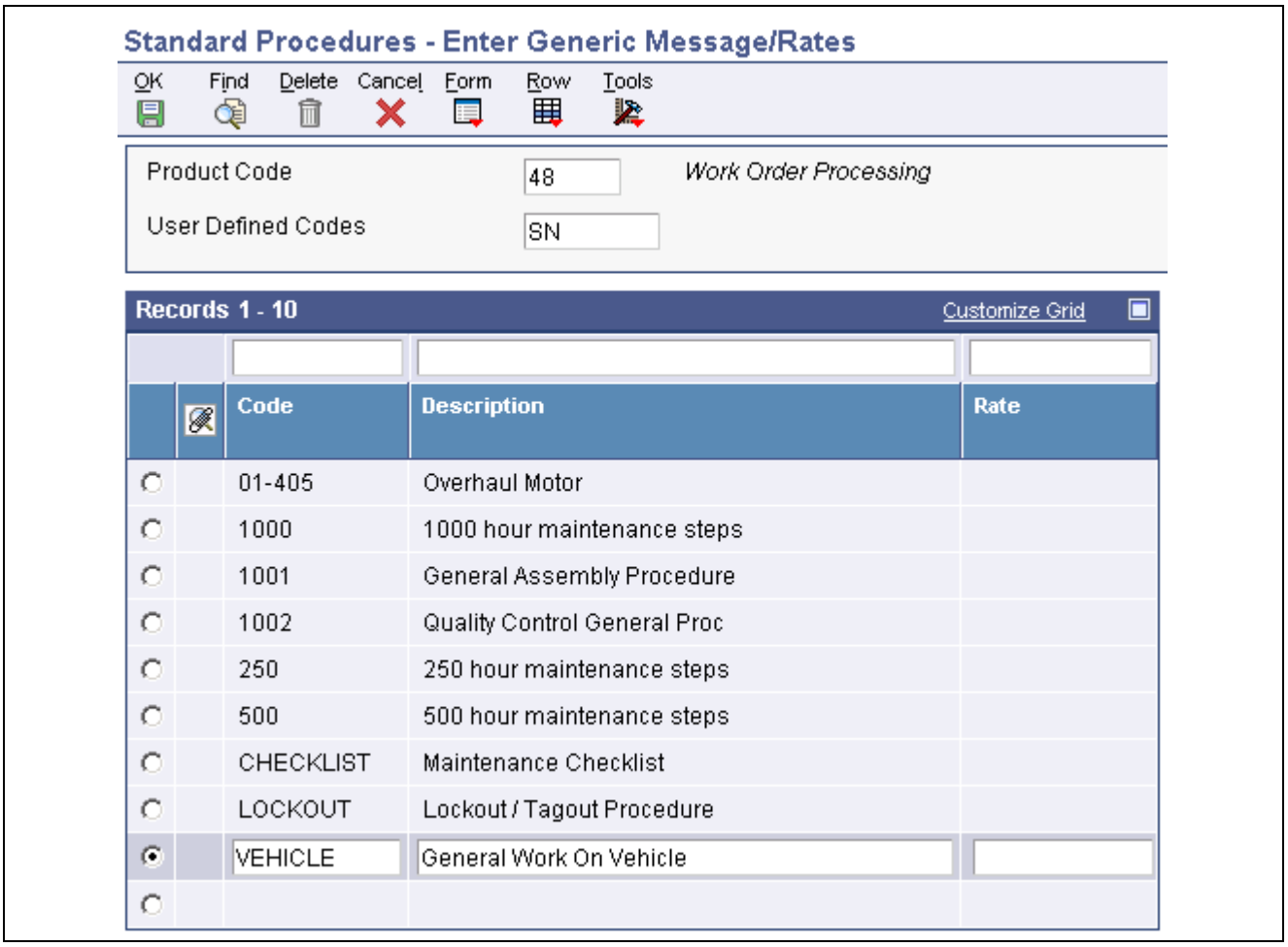
Use this processing option to specify the width, in characters, of the text column that the system displays. Values are:

1: 60 characters

2: 80 characters

Defining Standard Procedures for Work Orders

Access the Enter Generic Message/Rates form.



Enter Generic Message/Rates form

Setting Up Default Managers and Supervisors

This section provides an overview of default managers and supervisors, lists prerequisites, and discusses how to define work order default managers and supervisors.

Understanding Default Managers and Supervisors

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

- ANPA (Supervisor)
- ANSA (Manager)

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

Prerequisites

To use default values for the manager and supervisor address book numbers, set processing options for these programs:

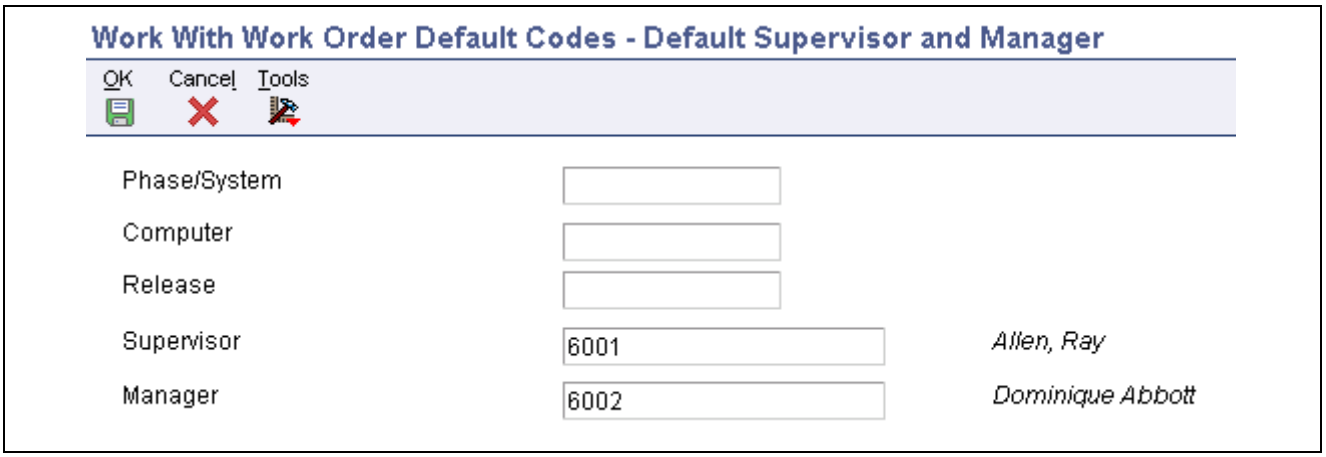
- Work Order Entry
- Project Setup (P48015)

Forms Used to Set Up Default Managers and Supervisors

Form Name	FormID	Navigation	Usage
Work With Word Order Default Codes	W48001A	Work Order Setup (G4841), Work With Work Order Default Codes	Review work order managers and supervisors.
Default Supervisor and Manager	W48001B	On Work With Work Order Default Codes, click Add.	Define work order default managers and supervisors.

Defining Work Order Default Managers and Supervisors

Access the Default Supervisor and Manager form.



Default Supervisor and Manager form

Note. To set up the default information, you must complete at least one user-defined code field and either or both fields associated with a supervisor or a manager.

Phase/System

Enter a user-defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.

Note. Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.

Computer

Enter a user-defined code (00/W3) that indicates the type or category of the work order.

Note. A processing option for some forms allows you to enter a default value for this field. The system enters the default value automatically in the appropriate fields on any work orders that you create on those forms and on the Project Setup form. You can either accept or override the default value.

Release

Enter a user-defined code (00/W2) that indicates the type or category of a work order.

Note. A processing option for some forms allows you to enter a default value for this field. The system enters the default value automatically in the appropriate fields on any work orders that you create on those forms and on the Project Setup form. You can either accept or override the default value.

Supervisor

Enter the address book number of the supervisor.

For some programs, you can use a processing option to specify a default value for this field based on values for category codes (phases) 1, 2 and 3. You can set up the default values in the Work with Work Order Default Codes program (P48001). The system automatically displays the information that you specify on all work orders that you create, provided that you meet the category code criterion. You can override the default value.

Manager Enter the address book number of a manager or planner.

Note. A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. You set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the default information displays automatically on any work orders that you create if the category code criterion is met. You can either accept or override the default value.

Setting Up Activity Rules for Work Orders

This section provides an overview of work order activity rules and discusses how to:

- Set up activity rules.
- Define approval routes.
- Set processing options for Distribution List Control (P02150).
- Set up user profiles.

Understanding Work Order Activity Rules

This section provides overviews of:

- Activity rules
- Approval routes
- User profiles

Activity Rules

Use activity rules to specify the status of a work order at any point in the life cycle. In addition, you use activity rules to:

- Select work orders for certain procedures.
- Prepare reports that are based on the current status of a work order.
- Change the PM (preventive maintenance) status when the work order changes status.
- Specify whether the work order is active or inactive at a particular status.
- Specify who has the authority to update claims at a certain status (for warranty claims and supplier recovery claims).

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

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

Approval Routes

Use approval routing to notify individuals when a work order requires their approval. You can use address book numbers to create various approval routes for individuals who need to be notified when a work order requires approval. You can establish specific approval routes based on approval type and monetary amount. You can also establish specific approval routes based on:

- Organizational structure
- Work order amount

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

User Profiles

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

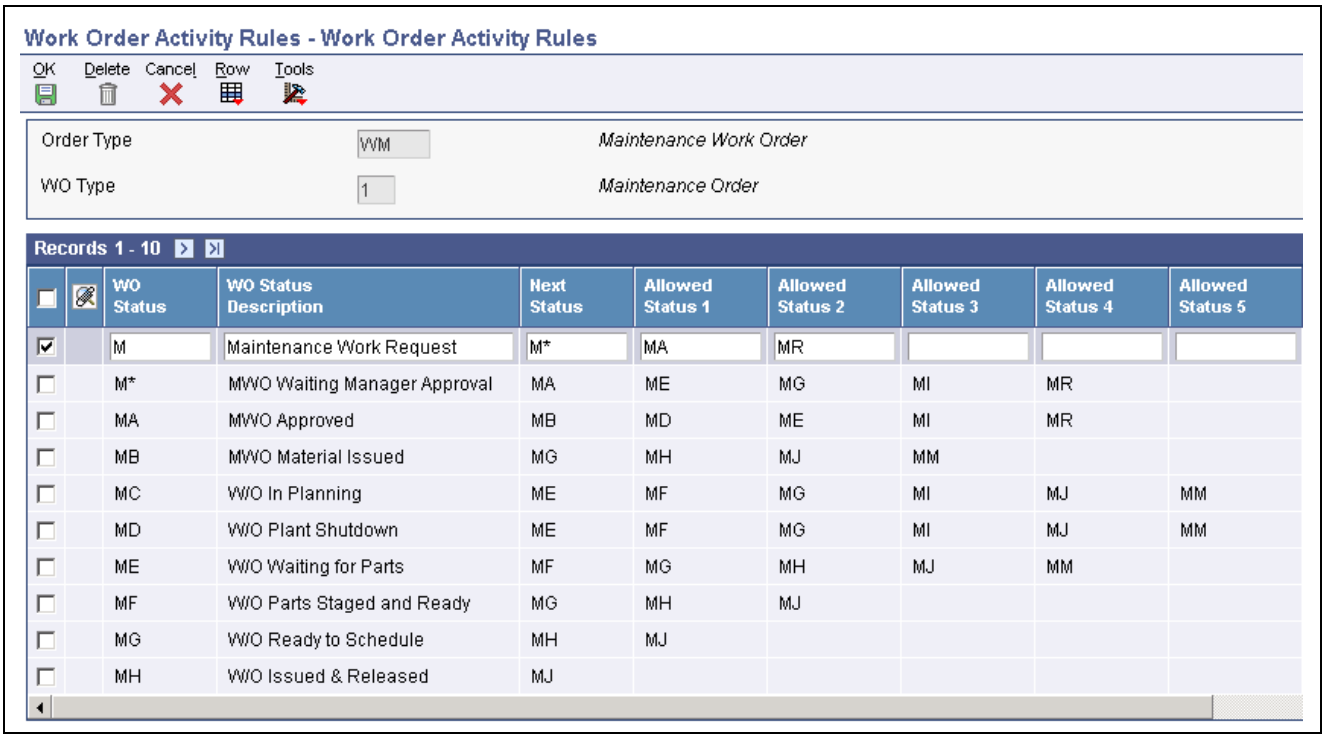
The system uses the approver's address book number to send electronic mail messages that are associated with work order approvals and to define the work order approval routing.

Forms Used to Set Up Activity Rules for Work Orders

Form Name	FormID	Navigation	Usage
Work with Work Order Activity Rules	W4826C	For the Work Orders system and the Capital Asset Management system: Work Order Setup menu (G4841), Work Order Activity Rules For the Service Management system: Warranty Claim Setup menu (G1747) or Supplier Recovery Setup menu (G1748), Work Order Activity Rules	Add or review activity rules for work orders.
Work Order Activity Rules	W4826D	On Work With Work Order Activity Rules, click Add.	Set up activity rules for work orders.
Reject Status	W4826E	On Work Order Activity Rules, select Reject Status from the Row menu.	Assign a reject status to a rule. This status is necessary only if you use an approval process.
Work With Distribution Lists	W02150A	Workflow Management Setup (G0241), Group Revisions	Define approval routes.
Address Parent/Child Revisions	W0150A	On Work With Distribution Lists, click Add.	Set up approval routes for work orders.
User Profile Revisions	W0092A	System Administration Tools (GH9011), User Profiles On Work With User / Role Profiles, select the user and click Select.	Define user profiles.

Setting Up Activity Rules

Access the Work Order Activity Rules form.



WO Status	WO Status Description	Next Status	Allowed Status 1	Allowed Status 2	Allowed Status 3	Allowed Status 4	Allowed Status 5
M	Maintenance Work Request	M*	MA	MR			
M*	MWO Waiting Manager Approval	MA	ME	MG	MI	MR	
MA	MWO Approved	MB	MD	ME	MI	MR	
MB	MWO Material Issued	MG	MH	MJ	MM		
MC	WO In Planning	ME	MF	MG	MI	MJ	MM
MD	WO Plant Shutdown	ME	MF	MG	MI	MJ	MM
ME	WO Waiting for Parts	MF	MG	MH	MJ	MM	
MF	WO Parts Staged and Ready	MG	MH	MJ			
MG	WO Ready to Schedule	MH	MJ				
MH	WO Issued & Released	MJ					

Work Order Activity Rules form

To set up activity rules for work orders :

1. Complete the fields on the Work Order Activity Rules form.
2. To define the activity rules for this classification of work orders, complete any of the fields for each activity rule that you need to define.

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

3. For each rule that you defined, complete the Edit Authority field.
4. For each rule that you defined, complete any of the remaining fields.
5. To assign a reject status to a rule, select the appropriate rule, and then elect Reject Status from the Row menu.

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

6. On Reject Status, complete the Reject Status field and click OK twice.
7. On Work Order Activity Rules, click OK.

Order Type Enter a user-defined code (00/DT) that identifies the document type and indicates how the general ledger processes transactions. The Engineering Change Management system uses type *EN* for engineering change orders.

WO Type (work order type)

Enter a user-defined code (00/TY) that indicates the classification of a work order, such as maintenance work orders, or engineering change orders.

You can use work order type as a selection criterion for work order approvals.

WO Status (work order status)

Enter a user-defined code (00/SS) that describes the status of a work order, rate schedule, or engineering change order. Any status change from *90* through *99* triggers the system to automatically update the completion date.

You must set up status codes for work orders before you can use them in the Next Status field or Allowed Status field. Do not delete a status code that you have also defined as a next status or other allowed status.

Next Status

Enter the next status for a work order, according to the work order activity rules, as the work order moves through the approval route.

You must define a status code as a work order status in the Work Order Activity Rules table before you can use it as a next status.

Allowed Status 1 (Optional)

Indicate a status that can be assigned as the next step in the order process. Although this is not the preferred or expected next step, this status is an allowed override. The system does not allow you to initiate an order line step or status that is not defined as either the expected next status or an allowed status. Other allowed status codes let you bypass processing steps. In processing options, these codes are often referred to as override next status codes.

You must define a status code as a work order status in the Work Order Activity Rules table before you can use it as a next status or another allowed status.

Maint. Status (maintenance status)

Enter a user-defined code (12/MS) that indicates the maintenance status of a piece of equipment, such as *50* for maintenance due or *60* for waiting for parts. This UDC is used only in Equipment Management.

Note. Status code *98* is reserved for canceled maintenance. Status code *99* is reserved for completed maintenance. Status code *01* (default) is reserved for initial maintenance setup.

Lock Flag

Enter a code that determines whether a work order can be changed at a particular status. The lock applies to records in both the F4801 table and the F4802 table. Values are:

Blank: Do not lock the work order.

1: Lock the work order.

2: Lock the work order with a completion date.

3: Do not lock the work order with a completion date.

4: Lock the work order, the parts list, and the routings.

5: Lock the work order, the parts list, and the routings with a completion date.

6: Lock the order type and the work order type only.

Edit Authority

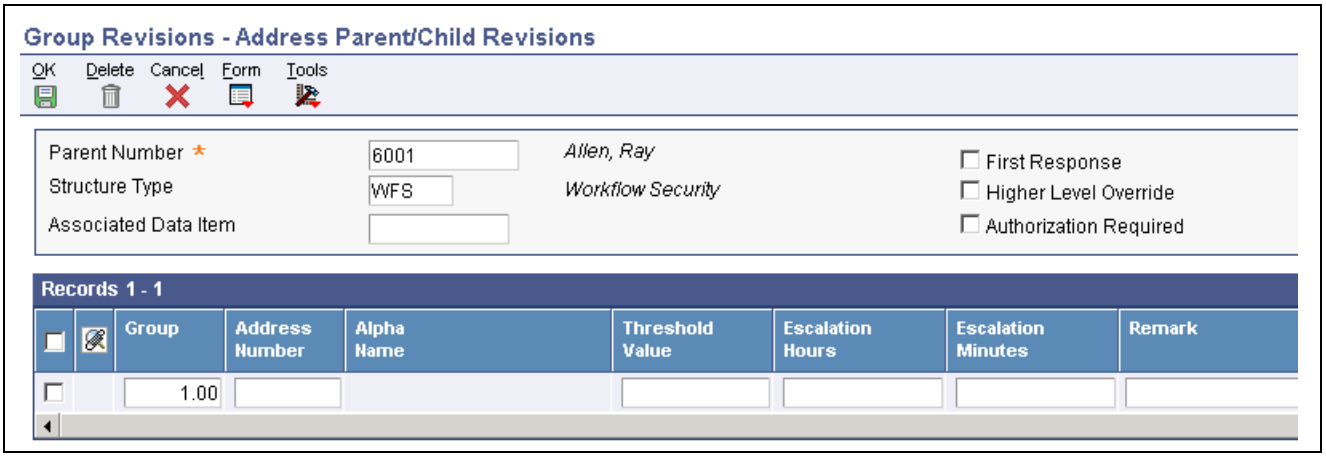
Complete this field for each rule that you define.

For warranty claims and supplier recovery claims, the value in this field specifies who has the authority to update claims that have a certain status.

Reject Status Enter the status that the work order will assume if an approver rejects a work order.

Defining Approval Routes

Access the Address Parent/Child Revisions form.



Address Parent/Child Revisions form

Parent Number Enter the address book number of the parent company. The system uses this number to associate a particular address with a parent company or location. Any value that you enter in this field updates the F0150 table for the blank structure type. This address number must exist in the F0101 table for validation purposes. Examples of address book records that would have a parent number include:

- Subsidiaries with parent companies.
- Branches with a home office.
- Job sites with a general contractor.

The address book number of the primary level in a hierarchy, or reporting relationship. A parent in one hierarchy can be a child in another hierarchy. You can organize a hierarchy by business unit, employee, or position. For example, you can create a hierarchy that displays the reporting relationships between employees and supervisors.

Structure Type Enter a user-defined code (01/TS) that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, email). Enter *WFS* in this field.

When you create a parent/child relationship for the Accounts Receivable system, the structure type must be blank.

On this form, Structure Type identifies the type of distribution list, such as *WFS* for workflow, *ORG* for group, and *EML* for email.

Associated Data Item Specify the data item that the system uses to retrieve the formatting information on the threshold value. Enter *AMTO* in this field.

First Response Review this option to determine how the system handles the first response. If this option is enabled, only one member of a distribution list must respond to the workflow message. When the first response is received by the workflow

system, the system cancels the messages that were sent to the other members of the group and marks the task as complete.

If this option is disabled, all members of the group to which the workflow message was sent must respond before the system marks the task as complete.

Higher Level Override Review this option. If this option is enabled and a person in a higher level group manually approves a workflow transaction (by a workbench program), then the system marks all lower level groups as bypassed.

If this option is disabled and a person in a higher level group manually approves the transaction, the action is logged and all lower level groups are still required to approve the transaction.

Authorization Required Review this option. If this option is enabled and a person in the distribution list enters a workflow transaction that goes through the distribution list, the system sends the message to the next highest person, even if the threshold has not been reached for the higher person.

If this option is disabled, no higher person is required to see the message as long as it is below the threshold.

Threshold Value Enter a value that is assigned to individuals within a distribution list to determine if the system includes the individuals in the approval of a workflow task. This value can be any numeric value, such as an amount, quantity, or percentage.

Escalation Hours Enter the amount of time that must elapse before a message is escalated.

Remark Enter a remark, description, name, or address.

Begin Eff Date (beginning effective date) Enter the date on which the address number appears in the structure. The Beginning Effective Date field prevents the address number from occurring in the structure until the beginning effective date is the same as the current date.

If you leave this field blank, the address number always occurs in a structure unless an ending effective date is specified.

End Eff Date (ending effective date) Enter the date on which the address book record will cease to exist in the structure

Setting Processing Options for Distribution List Control (P02150)

Use these processing options to supply default values for the Distribution List Control program.

Defaults

These processing options specify the default values for the structure type and the version.

1.) Enter the default Structure Type. Enter a user-defined code (01/TS) that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, email). When you create a parent/child relationship for the Accounts Receivable system, the structure type must be blank.

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

Enter the version to use for the Organizational Structure Revisions program. If you leave this processing option blank, the system uses the ZJDE0001 version.

Setting Up User Profiles

Access the User Profile Revisions form.

Setting Up Record Type Formats

This section provides an overview of record type formats and discusses how to define record type formats for work orders.

Understanding Record Type Formats

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

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

- Setup
- Production
- Tear-down and cleanup

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

You can review record types, formats, and column headings using either of these methods:

- From the Project Task Details program (P48014), select Record Type from the Form menu on the Enter Work Orders form
- From the Enter/Change Order program (P48013), select Record Type Review from the Form menu on the Work Order Details form.

Note. You must set up these record types for Capital Asset Management:

Maintenance Loops

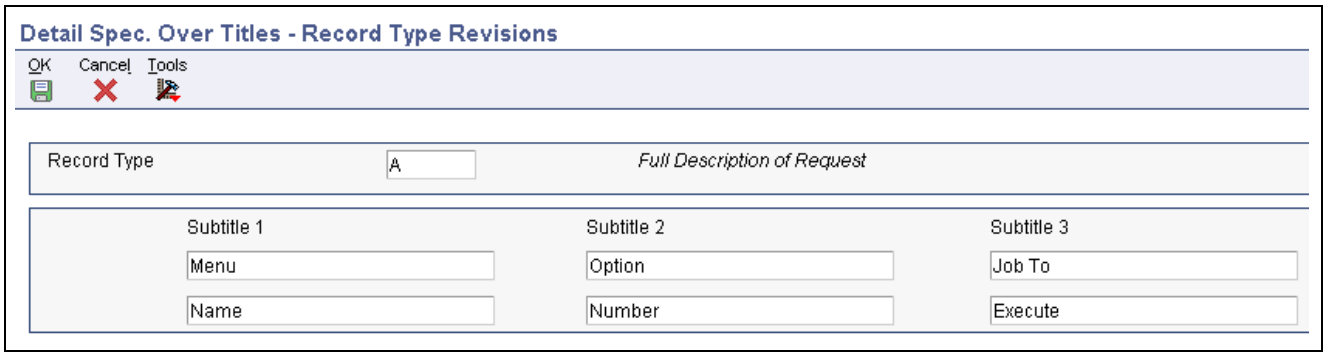
Associated PMs

Forms Used to Set Up Formats for Record Types

Form Name	FormID	Navigation	Usage
Work With Record Types	W4802E	Work Order Setup (G4841), Detail Spec. (Specifications) Over Titles	Review record type formats for work orders.
Record Type Revisions	W4802C	On Work With Record Types, click Add.	Set up record type formats for work orders.

Defining Record Type Formats for Work Orders

Access the Record Type Revisions form.



Record Type Revisions form

Record Type

Enter the detail specification record type. Record types are user-defined. You can set them up on the Detail Specification Types form and use them to describe certain types of work order or engineering change order information.

Subtitle 1, Subtitle 2, Subtitle 3

Enter a subtitle, description, remark, name, or address.

The text that you enter in this field appears as a column heading on the Work Order Detail Entry form for the record type that you indicate.

Setting Up Supplemental Data for Work Orders

This section provides an overview of supplemental data and discusses how to set up supplemental data for work orders.

Understanding Supplemental Data

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

You set up and maintain supplemental data in work order databases. Work order databases are user-defined codes (00/WD). For example, you might set up supplemental data for an engineering change order database. The data types might include detail types, pending orders, and so on. You can set up the system to validate that the values that you enter on supplemental data forms match the values that you set up in user-defined code tables.

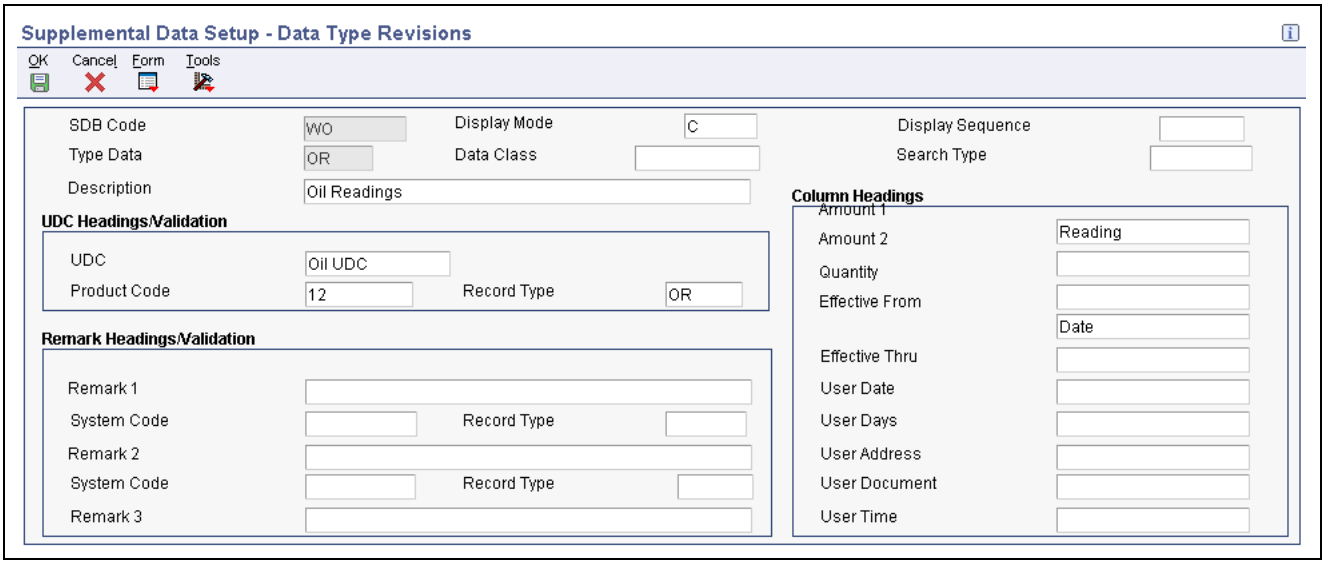
If the specification data type does not relate to an existing user-defined code or generic message code, you can set up a new user-defined code table. It is recommended that you use systems 55 through 59, inclusive, to set up the new tables. User-defined code tables that you set up for these systems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

Forms Used to Set Up Supplemental Data for Work Orders

Form Name	FormID	Navigation	Usage
Work With Supplemental Database Setup	W00091B	Work Order Setup (G4841), Supplemental Data Setup	Review existing supplemental data.
Data Type Revisions	W00091D	On Work With Supplemental Database Setup, select the database and select Work With Data Type from the Row menu. On Work With Data Types, click Add.	Define supplemental data.

Setting Up Supplemental Data for Work Orders

Access the Data Type Revisions form.



Data Type Revisions form

Display Mode

Enter a user-defined code (H00/DS) that specifies the format of a data type. This code determines the display mode for supplemental data. Values are:

C: Code format. This mode displays the form for entering code-specific information. These codes might be associated with the F0005 table.

N: Narrative format. This mode displays the form for entering narrative text.

P: Program exit. This mode allows you to exit to the program that you specified in the Program ID field.

M: Message format. This mode displays the form for entering code-specific information. The system can validate the code values that you enter against

values in the F00191 table. This code is not used by the Human Capital Management or Financial Management systems.

This is a required field for setting up any data type.

Type Data

Enter a code that you assign to supplemental data so that you can group data by categories. Values include:

A: Approval steps

B: Requisition requirements

C: Interview process

N: Requisition notes

This is a required field for setting up any data type. You can use an existing data type, or you can create a new data type by entering one or two characters for the code.

Display Sequence

Enter a number that specifies the order of a group of records on the form.

This is an optional field for setting up data types. You can specify a display sequence number for each data type. When you use the Work With Supplemental Data form, the data types appear in the order that you specified.

Data Class

Enter a user-defined code (00/CL) that identifies a group of data types in the Central Information File. Values include:

APP: Application call

NAR: Narrative

PUR: Products purchased

This is an optional field for setting up any data type. Data classifications must be set up in UDC Data Classifications (00/CL) before you can use them.

Complete this field to categorize data types by the kind of information that they contain. For example, if you have both narrative and code format data types that contain information about products purchased, you might want to assign the same data classification to both of these data types.

Search Type

Enter a user-defined code (01/ST) that specifies the kind of address book record to search for. Examples include:

E: Employees

X: Ex-employees

V: Suppliers

C: Customers

P: Prospects

M: Mail distribution lists

TAX: Tax authorities

This is an optional field for setting up any data type. Search types must be set up in UDC Search Type (01/ST) before you can use them.

UDC (user-defined code)

Displays a description of a supplemental data column that relates to a user-defined code. For example, if the supplemental data type relates to

the educational degrees of employees (BA, MBA, Ph.D., and so on), the description could be Degree. This column contains user-defined codes.

Data that you enter in the UDC (alias GDC1) field overrides the UDC (alias KY) column heading name in the detail area on the General Description Entry form.

You can set up this field as a generic field or as a field that is associated with user-defined codes.

If you leave the corresponding Product Code (alias SY) and Record Type (alias RT) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the UDC (alias KY) column.

If you complete the corresponding System Code (alias SY1) and Record Type (alias TR1) fields, then on the General Description Entry form, the system validates the data that you enter in the data entry field for the UDC (alias KY) column.

This is an optional field for setting up supplemental data types in code format.

System Code

Enter a user-defined code (98/SY) that identifies a JD Edwards EnterpriseOne system.

The System Code (alias SY1) and Record Type (alias RT1) fields work together to associate a user-defined codes table to the Remark 1 (alias GDC3) field.

The system uses the user-defined codes table to verify data that you enter in the Remark (alias RMK) field on the General Description Entry form.

For example, if you enter *08* in the System Code (alias SY1) field and *SK* in the Record Type (alias RT1) field, then on the General Description Entry form, the data that you enter in the Remark (alias RMK) field must exist in the Human Resources system (08), user-defined codes table Skills (SK).

If you leave the System Code (alias SY1) and Record Type (alias RT1) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the Remark (alias RMK) column.

This is an optional field for setting up supplemental data types in code format.

Record Type

Enter a code that identifies the table that contains user-defined codes. The table is also referred to as a UDC type.

The Record Type (alias RT) and Product Code (alias SY) fields work together to associate a UDC table to the UDC (alias GDC1) field. The system uses the UDC table to verify data that you enter in the UDC (alias KY) field on the General Description Entry form.

For example, if you enter*08* in the Product Code (alias SY) field and *SK* in the Record Type (alias RT) field, then on the General Description Entry form, the data that you enter in the UDC (alias KY) field must exist in the Human Resources system (08), UDC table Skills (SK).

If you leave the Record Type (alias RT) and Product Code (alias SY) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the UDC (alias KY) column.

This is an optional field for setting up supplemental data types in code format.

Remark 1

Enter the title of a supplemental data column.

Data that you enter in the Remark 1 (alias GDC3) field overrides the Remark (alias RMK) column heading in the detail area on the General Description Entry form.

You can set up this field as a generic field or as a field that is edited against a UDC table.

If you leave the corresponding System Code (alias SY1) and Record Type (alias RT1) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the Remark (alias RMK) column.

If you complete the corresponding System Code (alias SY1) and Record Type (alias RT1) fields, then on the General Description Entry form, the system validates the data that you enter in the data entry field for the Remark (alias RMK) column.

This is an optional field for setting up supplemental data types in code format.

Remark 2

Enter the title of a supplemental data column.

Data that you enter in the Remark 2 (alias GDC4) field overrides the Remarks Line 2 (RMK2) column heading in the detail area on the General Description Entry form. You can set up this field as a generic field or as a field that is edited against a UDC table.

If you leave the corresponding System Code (SY2) and Record Type (RT2) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the Remarks Line 2 (alias RMK2) column.

If you complete the corresponding System Code (SY2) and Record Type (RT2) fields, then on the General Description Entry form, the system validates the data that you enter in the data entry field for the Remarks Line 2 (alias RMK2) column.

This is an optional field for setting up supplemental data types in code format.

Amount 1

Enter the title of a supplemental data column that relates to an amount. For example, if the data type relates to bid submittals, the heading could be *Bid Amounts*. This column contains statistical or measurable information.

Data that you enter in the Amount 1 (alias GDC1) field overrides the User Defined Amount (alias AMTU) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data types in code format.

Amount 2

Enter the title of a supplemental data column that relates to an amount. For example, if the data type relates to stock options, the heading could be *Strike Price*. This column contains statistical or measurable information.

Data that you enter in the Amount 2 (alias GDC7) field overrides the User Defined Amount #2 (alias AMTV) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data types in code format.

Quantity

Enter the title of a supplemental data column that relates to quantities. For example, if you want to track quantity to be scrapped, a column heading might be *Scrapped*.

Data that you enter in the Quantity (alias GDC0) field overrides the Quantity Ordered (alias UORG) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data types in code format.

Effective From

Enter the title of a supplemental data column that relates to a date. For example, a possible column heading for the date field that is linked to a data type for education might be *Graduation*.

Data that you enter in the Effective From (alias GDC5) field overrides the Effective Date (alias EFT) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data types in code format.

Effective Thru

Enter the title of a supplemental data column that relates to a date. For example, if you set up a record type for professional licenses, a possible column title for the date field might be *Expires*.

Data that you enter in the Effective Thru (alias GDC6) field overrides the Ending Date (alias EFTE) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data types in code format.

User Date

Enter the title of a supplemental data column that relates to a date. For example, a possible column heading for the date field linked to the education data type might be *Graduation*.

Data that you enter in the User Date (alias GDCA) field overrides the User Def Days (alias DYUD) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data types in code format.

User Days

Enter the title of a supplemental data column that relates to a heading of a supplemental data column heading for the User Defined Days field (DYUD). For example, a possible column heading for the days field that is linked to scheduling data type might be *Lead Time*. This column contains numbers.

Data that you enter in the User Days (GDCC) field overrides the User Def Days (alias DYUD) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data types in code format.

User Address

Enter the title of a supplemental data column that relates to addresses. For example, a possible column heading for the address field linked to an education data type might be the *College Address*.

Data that you enter in the User Address (alias GDCD) field overrides the User Address (alias AN8) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data types in code format.

User Document

Enter the title of a supplemental data field that relates to a document number. For example, if the company handles accounts receivables, a possible column heading might be *Invoices.* This column contains document numbers.

Data that you enter in the User Document (alias GDC8) field overrides the Related PO/SO No (alias RORN) column heading name in the detail area on the General Description Entry form.

This is an optional field for setting up supplemental data type in code format.

Setting Up Accounting Rules for Work Orders

If you apply charges to work orders using the speed entry code on JD Edwards EnterpriseOne Time Accounting or Payroll forms, you must set up the system to distribute the charges to the proper object account. You set up these object accounts in the Accounting JE Rules - Labor/Billings/Equipment program (P069043).

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

Make sure that you have installed at least one of these JD Edwards EnterpriseOne systems:

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

See Also

JD Edwards EnterpriseOne Time and Labor 9.0 Implementation Guide, "Setting Up Automatic Accounting Instructions for JD Edwards EnterpriseOne Human Capital Management"

JD Edwards EnterpriseOne Product Data Management 9.0 Implementation Guide, "Setting Up Product Data Management"

CHAPTER 4

Creating Work Orders

This chapter provides an overview of work order creation, lists common fields used in this chapter, and discusses how to:

- Define work orders.
- Copy parent work orders.
- Create work orders for a project.

Understanding Work Order Creation

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- Work Order Type
- Start Date
- Planned Completion Date

Note. Before you create work orders, you must define the chart of accounts for the charge-to business unit information.

See *JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation Guide*, "Creating the Chart of Accounts".

Common Fields Used in this Chapter

Asset Number

Enter an identification code that represents an asset. You enter the identification code in one of these formats:

1: Asset number (a computer-assigned, 8-digit, numeric control number).

2: Unit number (a 12-character alphanumeric field).

3: Serial number (a 25-character alphanumeric field).

Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character that you enter indicates whether you are entering the primary (default) format that is defined for the system or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format that you are using. You assign special characters to asset number formats on the fixed assets system constants form.

On this form, if you enter an equipment number when you create a work order, the system can assign a default search cross-reference number based on that equipment number.

Processing options enable you to determine whether the system assigns the equipment's immediate parent number, its top-level parent number, or a value from the parent work order number as the search cross-reference.

Complete Date

Enter the date that the work order or engineering change order is completed or canceled.

Customer

Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location. Depending on how you set processing options, you might be required to enter a customer number.

Manager

Enter the address book number of a manager or planner.

Note. A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. You set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the default information appears automatically on any work orders that you create if the category code criterion is met. You can either accept or override the default value.

Parent Number

Enter a number that identifies the parent work order. The default value for the parent number is the work order number. You can use this number to:

- Enter default values for new work orders, such as type, priority, status, and manager.
- Group work orders for project setup and reporting.

You can copy information from a parent work order to create a new work order.

On the new work order, you must complete some fields for unique information. If you leave the remaining fields blank, the system completes them with values from the parent work order.

Parent W.O. No (parent work order number)

Enter a number that identifies the parent work order. You can use this number to:

- Enter default values for new work orders, such as type, priority, status, and manager.
- Group work orders for project setup and reporting.

Phase

Enter a user-defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.

Note. Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.

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

Start Date

Enter a start date for the work order or engineering change order. You can enter the date manually or let the system enter it for you. If the work order is associated with a parent work order, the system enters the start date from the parent work order. If there is no associated parent work order, the system enters the system date.

Subsidiary

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

Note. If you are using a flexible chart of accounts and the object account is set to six digits, you must use all six 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 six-digit object.

Supervisor

Enter the address book number of the supervisor. You can enter address book numbers to track originator and supervisor information for a work order. You can set up the system to automatically enter the address book number of the supervisor for work orders.

For some programs, you can use a processing option to specify a default value for this field based on values for category codes (phases) 1, 2, and 3. You can set up the default values in the Work with Work Order Default Codes program (P48001). The system automatically displays the information that you specify on all work orders that you create, provided that you meet the category code criterion. You can override the default value.

Defining Work Orders

This section discusses how to:

- Enter basic work order information.

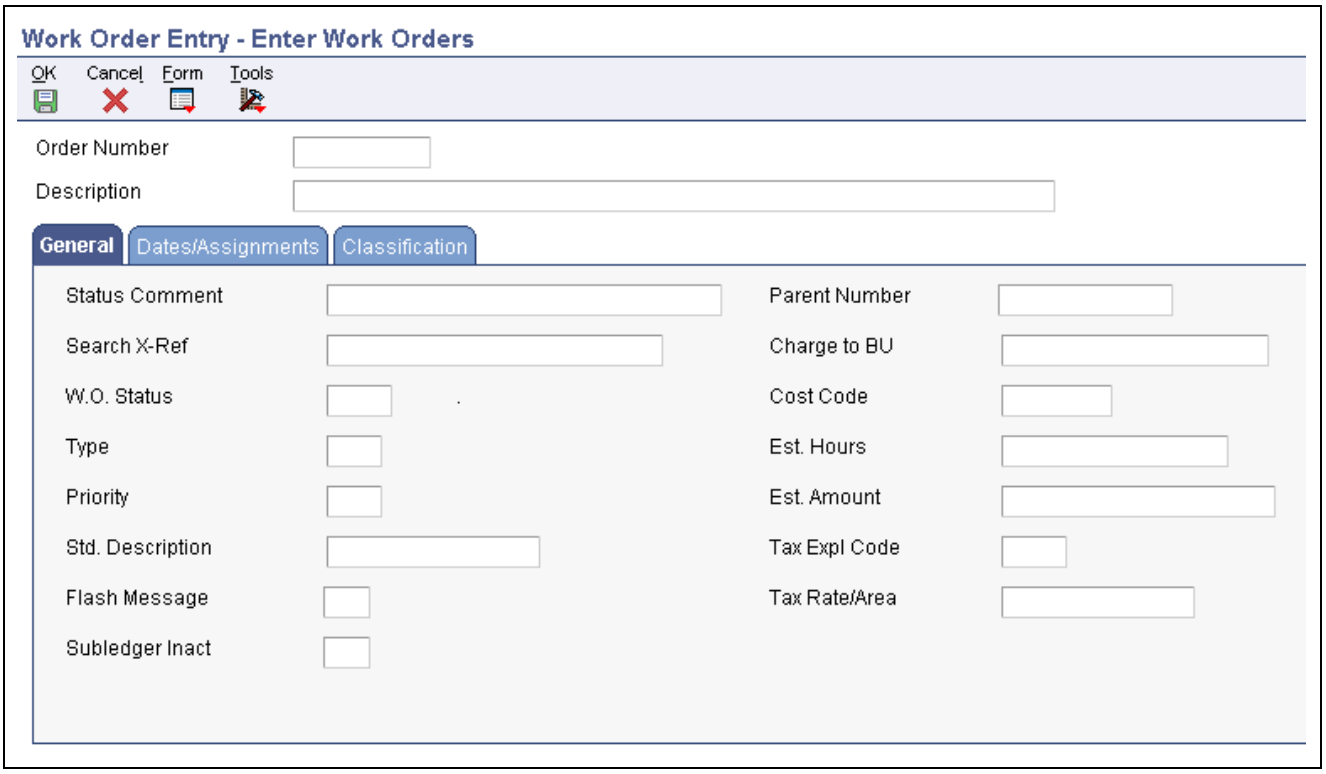
- Enter record type descriptions.
- Set processing options for Work With Work Orders (P48201).
- Add supplemental data.
- Set processing options for Supplemental Data (P00092).
- Review supplemental data by data type.
- Set processing options for Inquiry by Data Type (P480210).
- Review supplemental data by work order.
- Set processing options for Work With Supplemental Data (P480200).

Forms Used to Define Work Orders

Form Name	FormID	Navigation	Usage
Work With Work Orders	W48201F	Work Order Processing (G4811), Work Order Entry	Access work orders, or forms to enter work orders.
Enter Work Orders	W48014A	On the Work With Work Orders form, click Add.	Enter basic work order information.
Work With Work Order Record Types	W48217B	On the Work With Work Orders form, find and select a work order. From the Row menu, select Supplemental and then Record Types.	Enter record type descriptions for work orders. **Note.** If you access this program from Service Management as a CRM user or from Capital Asset Management, the Equipment Number field might instead appear as Serial Number or Unit Number, depending on which setting you select in the Equipment Constants program (P001012).
Data Type Revisions	W00091D	Work Order Supplemental Data (G4813), Data Entry On Work With Supplemental Data, select a record and select Data Type Revision from the Row menu.	Add supplemental data.
Work With Supplemental Data	W480200F	Work Order Supplemental Data (G4813), Inquiry by Order On Work With Supplemental Data, enter an order number and click Find.	Review supplemental data by work order.
Work Order Data Revisions	W480210C	Work Order Supplemental Data (G4813), Inquiry by Data Type On Work With Inquiry By Data Type, enter a data type and click Find. Select a record and click Select.	Review supplemental data by type.

Entering Basic Work Order Information

Access the Enter Work Orders form.



Enter Work Orders form

General

Select the General tab.

Charge to BU (charge to business unit)

Enter a separate entity within a business for which you want to track costs. For example, a business unit might be a job, project, work center, or branch/plant.

Business unit security can prevent you from locating business units for which you have no authority.

Status Comment

Enter a brief description to explain the status of the work order.

Search X-Ref (search cross-reference)

Enter a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.

W.O. Status (work order status)

Enter a user-defined code (00/SS) that describes the status of a work order, rate schedule, or engineering change order. Any status change from 90 through 99 triggers the system to automatically update the completion date.

Type

Enter a user-defined code (00/TY) that indicates the classification of a work order or engineering change order.

You can use work order type as a selection criterion for work order approvals.

Priority

Enter a user-defined code (00/PR) that indicates the relative priority of a work order or engineering change order in relation to other orders.

A processing option for some forms lets you enter a default value for this field. The value then appears automatically in the appropriate fields on any work

order that you create on those forms and on the Project Setup form. You can either accept or override the default value.

Std. Description (standard description)

Enter a generic rates and message code (48/SN) that is assigned to a standard note, message, or general narrative explanation. You can use the Standard Description user-defined code to assign standard procedures or instructions to multiple work orders. You set up codes for this field on the Generic Message/Rate Types table (F00191).

Flash Message

Enter a user-defined code (00/WM) that indicates a change in the status of a work order. The system indicates a changed work order with an asterisk in the appropriate report or inquiry form field. The system highlights the flash message in the Description field of the work order.

Subledger Inact (subledger inactive)

Select an option that indicates whether a specific subledger is inactive. Examples of inactive subledgers are jobs that are closed, employees who have been terminated, or assets that have been disposed. Select this option to indicate that a subledger is inactive. If a subledger becomes active again, clear this option. If you want to use subledger information in the tables for reports, but you want to prevent transactions from posting to the record in the Account Balances table (F0902), select this option. Values are:

Off: Subledger active.

On: Subledger inactive.

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

Cost Code

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

Note. If you are using a flexible chart of accounts and the object account is set to six digits, you must use all six 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 six-digit object.

Est. Hours (estimated hours)

Enter the estimated hours that are budgeted for this work order.

Est. Amount (estimated amount)

Enter the estimated monetary amount that is budgeted for this work order.

Tax Expl Code (tax explanation code)

Enter a user-defined code (00/EX) that controls how a tax is assessed and distributed to the GL revenue and expense accounts.

Tax Rate/Area

Enter a code that identifies a tax or geographic area that has common tax rates and tax distribution. You must define the tax/rate area to include the tax authorities (for example, state, county, city, rapid transit district, province, and so on) and their rates. In order for the codes to be valid, you must set them up in the Tax Rate/Area file.

Date/Assignments

Select the Date/Assignments tab.

Planned Comp (planned completion) — Enter the date that the work order or engineering change order is planned to be completed.

Date Assigned — Enter the date that the person responsible for the work order receives the work order.

Transaction — Enter the date that a specific order was entered into the system. The default value for this date is the system date.

Originator — Enter the address book number of the person who entered the work order. The system verifies this number against the Address Book. If you leave the Originator field blank, the system enters an originator based on the user's address book number.

Classification

Select the Classification tab.

Category 02 — Enter a user-defined code (00/W2) that indicates the type or category of a work order.

Note. A processing option for some forms lets you enter a default value for this field. The system enters the default value automatically in the appropriate fields on any work orders that you create on those forms and on the Project Setup form. You can either accept or override the default value.

Category 03 — Enter a user-defined code (00/W3) that indicates the type or category of the work order.

Category 04 — Enter a user-defined code (00/W4) that indicates the type or category of the work order.

Category 05 — Enter a user-defined code (00/W5) that indicates the type or category of the work order.

Status — Enter a user-defined code (00/W6) that indicates the status of the work order.

Service Type — Enter a user-defined code (00/W7) that indicates the service type for the work order.

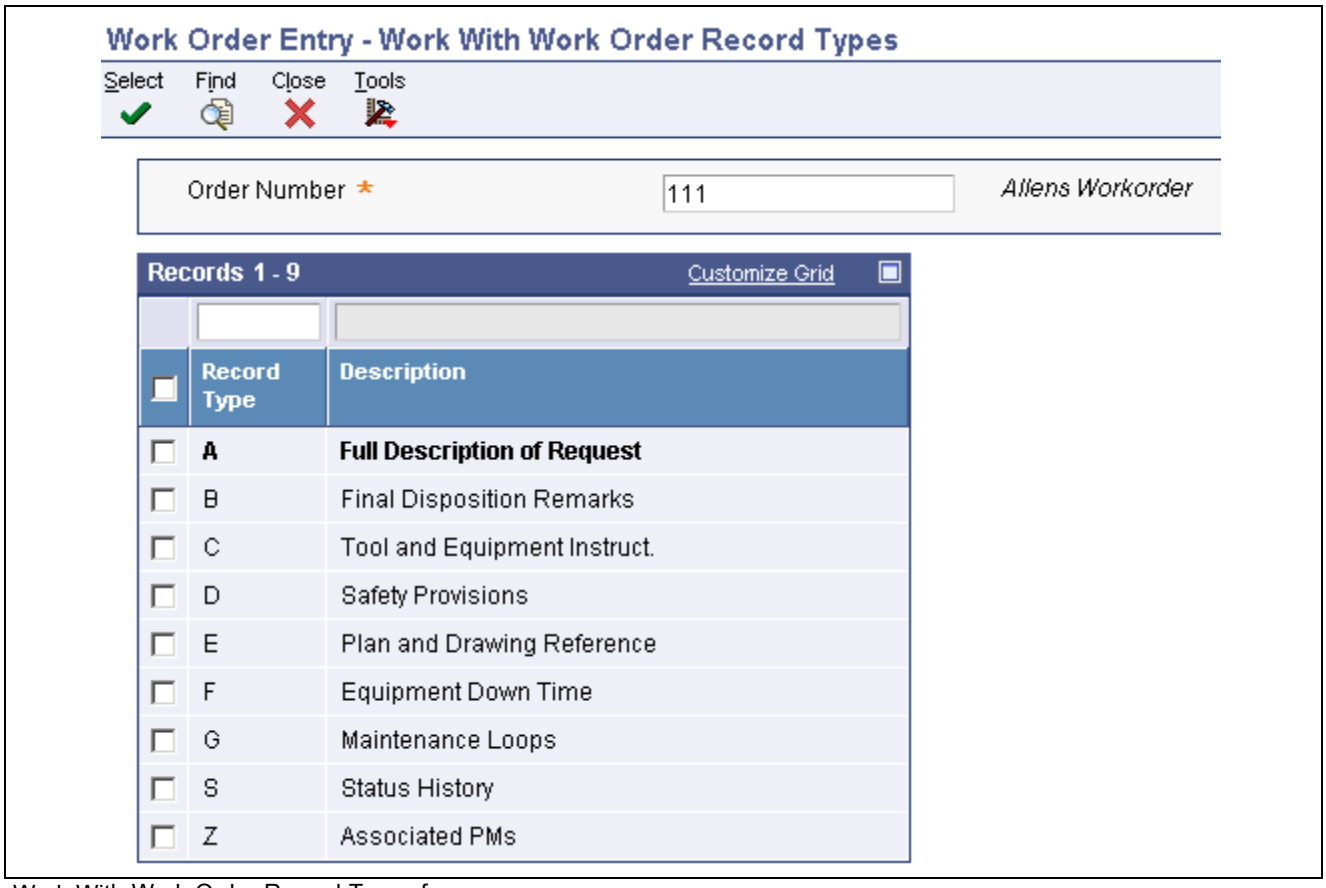
Skill Type — Enter a user-defined code (00/W8) that indicates the type or category of the work order.

Experience Level — Enter a user-defined code (00/W9) that indicates the type or category of the work order.

Category 10 — Enter a user-defined code (00/W0) that indicates the type or category of the work order.

Entering Record Type Descriptions

Access the Work With Work Order Record Types form.



Work With Work Order Record Types form

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

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

- Description only.
- Description with three columns.

You can also copy descriptive information from another work order.

Setting Processing Options for Work With Work Orders (P48201)

Use these processing options to supply the default values for the Work With Work Orders program.

Defaults

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

1. From Status Code W.O. (1. from status code work order)

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

2. Thru Status Code W.O. (2. thru status code work order)
Specify the ending status code for a range of work orders. The system uses this default when searching for work orders. Enter a value from UDC 00/SS (Work Order Status).

3. Type - W.O. (3. type - work order)
Specify the classification of work orders or engineering change orders. The system uses this default when searching for work orders. Enter a value from UDC 00/TY (Work Order/ECO Type).

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

5. Job or Business Unit
Specify the business unit or job that the system uses to search for work orders.

6. Models
Specify whether the system displays model work orders. Values are:

Blank: Do not display model work orders.

1: Display model work orders.

7. Originator
Specify the originator of the work order that the system uses to search for work orders.

8. Customer
Specify the customer of the work order that the system uses to search for work orders.

9. Manager/Crew
Specify the manager of the work order that the system uses to search for work orders.

10. Supervisor
Specify the supervisor of the work order that the system uses to search for work orders.

Categories

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

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

2 – 20. Category Code 02 through 20
Specify the type or category of work orders that the system uses to search for work orders. Enter a value from these UDCs:

- Category Code 02: 00/W2
- Category Code 03: 00/W3
- Category Code 04: 00/W4
- Category Code 05: 00/W5
- Category Code 06: 00/W6
- Category Code 07: 00/W7
- Category Code 08: 00/W8
- Category Code 09: 00/W9
- Category Code 10: 00/W0
- Category Code 11: 00/X1

- Category Code 12: 00/X2
- Category Code 13: 00/X3
- Category Code 14: 00/X4
- Category Code 15: 00/X5
- Category Code 16: 00/X6
- Category Code 17: 00/X7
- Category Code 18: 00/X8
- Category Code 19: 00/X9
- Category Code 20: 00/X0

Versions

These processing options control which version the system uses when programs are called.

1. Work Order Print (R17714) Version	Specify the version of the Work Order Print program (R17714) that the system uses when printing work orders. If you leave this processing option blank, the system uses the XJDE0001 version.
2. Equipment Work Order Print (R48425) Version	Specify which version of the Maintenance Work Order Report program (R48425) that the system uses to print work orders. If you leave this processing option blank, the system uses the XJDE0001 version.
3. Project Work Order Print (R48415) Version	Specify the version of the Work Order Print program (R48415) to use when printing project work orders. If you leave this processing option blank, the system uses the XJDE0001 version.
4. Tenant Work Order Print (R15448) Version	Specify the version of the Tenant Work Order Print program (R15448) that the system uses when printing tenant work orders. If you leave this processing option blank, the system uses the XJDE0001 version.
5. Completed PM (P12071) Version	Specify the version of the Preventive Maintenance Backlog program (P12071) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.
6. Parts Detail (P17730) Version	Specify the version of the Work Order Parts Detail program (P17730) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.
7. Labor Detail (P17732) Version	Specify the version that the system uses for the Work Order Labor Detail program (P17732). If you leave this processing option blank, the system uses the ZJDE0001 version.
8. Inventory Issues (P31113) Version	Specify the version of the Work Order Inventory Issues program (P31113) that the system uses. If you leave this processing option blank, the system uses the ZJDE0002 version.
9. Time Entry (P311221) Version (S/WM Only)	Specify the version of the Work Order Time Entry program (P311221) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.

10. Work With Returned Material Authorization (P40051) Version (S/WM Only)	Specify the version of the Work With Return Material Authorization program (P40051) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.
11. Open Purchase Order (P4310) Version	Specify the version of the Purchase Orders program (P4310) that the system uses. If you leave this processing option blank, the system uses the ZJDE0011 version.
12. Returned Material Authorization Revisions (P400511) Version (S/WM Only)	Specify the version of the Return Material Authorization Revisions program (P400511) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.
13. On Line Work Order Quote (P17717) Version (S/WM Only)	Specify the version of the On Line Work Order Quote Inquiry program (P17717) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.
14. Time Entry By Employee (P051121) Version	Specify the version of Speed Time Entry (P051121) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.
15. Work with Failure Analysis (P17766) Version	Specify the version of the Work with Failure Analysis program (P17766) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.
16. Failure Analysis (P17767) Version	Specify the version of the Failure Analysis program (P17767) that the system uses. If you leave this processing option blank, the system uses the ZJDE0001 version.
17. Supplier Recovery Generation (R1776) Version	Specify the version of the Create Supplier Recovery Claims program (R1776) that you want to use to generate a supplier recovery claim from a work order. If you leave this processing option blank, the system uses the XJDE0001 version.
18. Status History (P1307) Version	Specify which version that the system uses for the Status History program (P1307). If you leave this processing option blank, the system uses the ZJDE0001 version.
19. Work with Equipment Work Orders (P13220) Version	Specify the version of the Work with Equipment Work Orders program (P13220) that you want to use. If you leave this processing option blank, the system uses the ZJDE0001 version.
20. Work Order Cost (P48211) Version	Specify the version of the Work Order Cost program (P48211) that you want to use when you review the cost of an order. If you leave this processing option blank, the system uses the ZJDE0001 version.
21. Resource Assignment (P48331) Version	Specify the version that the system uses for the Resource Assignment program (P48331). If you leave this processing option blank, the system uses the ZJDE0001 version.
22. Quick Customer/Contact Add (P01015) Version	Specify the version of the Quick Customer/Contact Add program (P01015) that you want to use. If you leave this processing option blank, the system uses the ZJDE0001 version.
23. Equipment Search/Select (P17012S) Version	Specify the version to use for the Equipment Search/Select application (P17012S). If this processing option is left blank, the system uses version ZJDE0001.

WO Entry

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

1. Work Order Entry Program

Specify which program the system uses for work order entry and printing when you create or select a work order. Values are:

1: Work Order Revisions (P17714).

2: Project Task Details (P48014).

3: Tenant Work Order Entry (P15248).

2. Work Order Entry Version

Specify the version for the selected work order entry program. If you leave this processing option blank, the system uses the ZJDE0001 version.

Process

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

1. Priority

Specify whether the system applies a contrasting color to the Priority field within the detail area. Values are:

Blank: Do not apply a contrasting color to the Priority field.

1: Apply a contrasting color to the Priority field.

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

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2. Customer Self-Service Functionality

Specify whether the system activates customer self-service functionality. Values are:

Blank: Do not activate customer self-service functionality.

1: Activate customer self-service functionality for Java and HTML.

2: Activate customer self-service functionality for Windows.

Adding Supplemental Data

Access the Work with Supplemental Data form.

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

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

Code Type	Description
C (Code) XE Supplemental data: code format Code format: supplemental data	You can define column titles and enter information, such as dates and amounts, in the columns.
N (Narrative) XE Supplemental data: narrative format Narrative format: supplemental data	You can enter free-form text, such as notes and memos. You can attach narrative information to code information.

If the data type is in Narrative format, type the narrative text, such as safety procedures, and then click Save. If the data type is in Code format, on the General Description Entry form, complete any of the fields, as necessary, and then click OK. For Narrative data types, on Media Object Viewer, click the Text button.

WO.Number (work order number) Specify one of the numeric keys to the Generic Supplemental Database. You can select the key from a list of supported data items, such as address number, account ID, asset ID, item number, and so on.

Setting Processing Options for Supplemental Data (P00092)

Use these processing options to supply the default values for the Supplemental Data program.

Processing

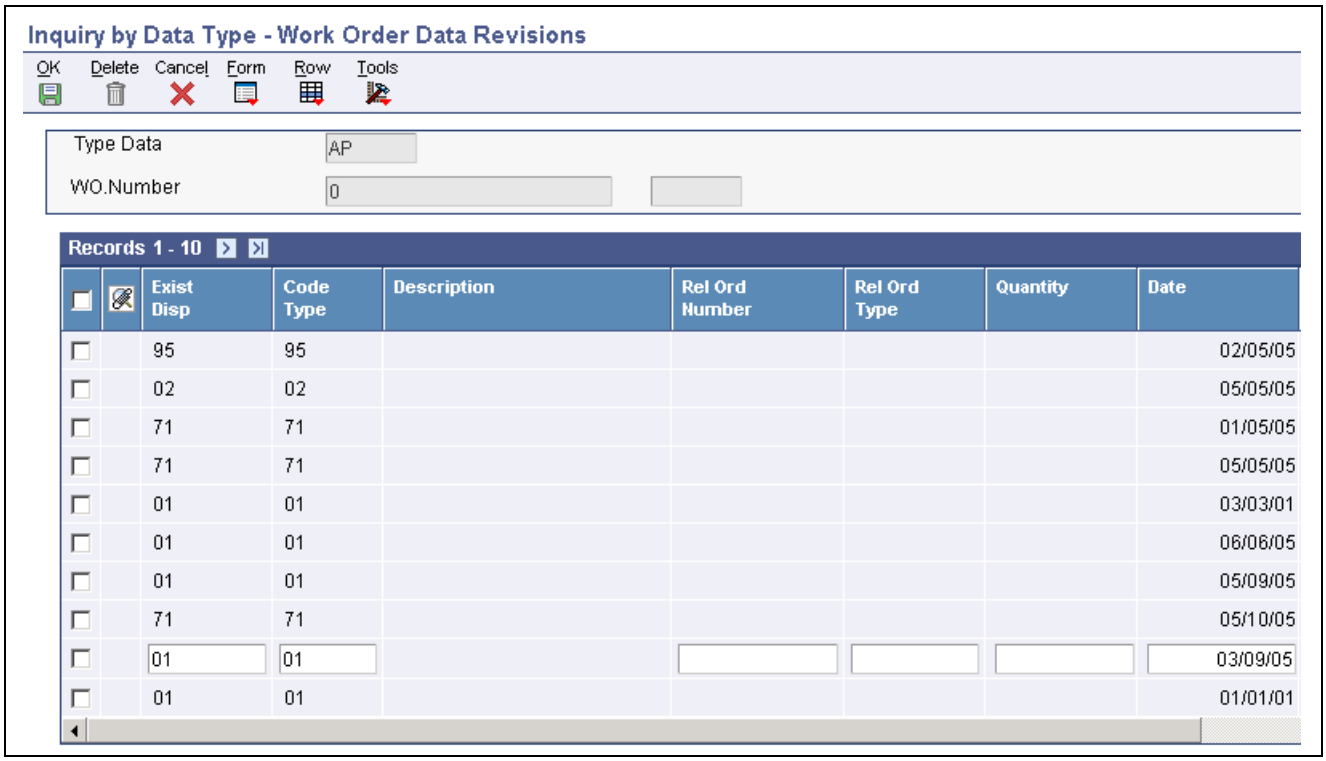
These processing options specify the values for supplemental database codes and ending effective dates.

1. Select the Supplemental Database Code for the system you would like to create a central information index for. Enter a user-defined code (00/SD) that sets up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills.

2. Enter a '1' if the system should not assign an ending effective date when the field is left blank. Specify whether the system assigns an ending effective date.

Reviewing Supplemental Data by Type

Access the Work Order Data Revisions form.



Work Order Data Revisions form

After you enter supplemental data, you can use these formats to review and revise the information:

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

Setting Processing Options for Inquiry by Data Type (P480210)

Use these processing options to supply default values for the Inquiry by Data Type program.

Display options

These processing options specify display options for supplemental data.

1. Enter the Work Order Data Base. Only Data Types with this Data Base can be displayed on the screen. Leave blank to default Data Base E (Engineering Change Orders).

Enter a user-defined code (00/SD) that sets up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills.

2. Enter the Date Type within the Data Base above to default on the screen. If left blank, no Data Type will be defaulted.

Enter a code that you assign to supplemental data so that you can group data by categories. Values include:

A: Approval steps

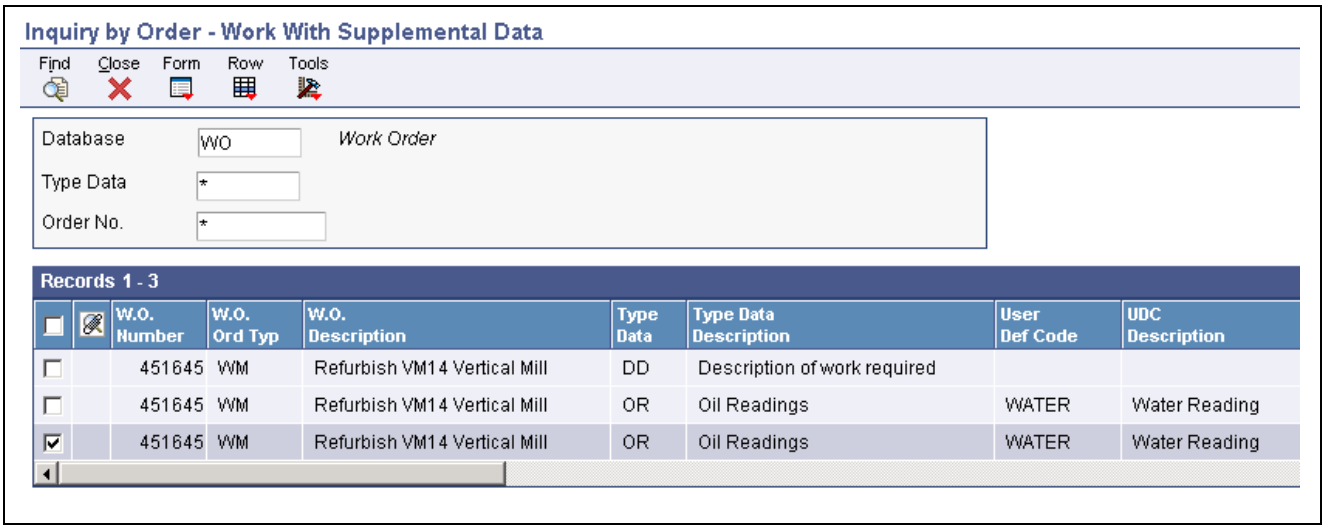
B: Requisition requirements

C: Interview process

N: Requisition notes

Reviewing Supplemental Data by Work Order

Access the Work With Supplemental Data form.



Work With Supplemental Data form

To view additional information, select a record in the detail area, and then select the appropriate option from the Row menu.

Setting Processing Options for Work With Supplemental Data (P480200)

Use these processing options to supply default values for the Work With Supplemental Data program.

Defaults

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

Enter a user-defined code (00/SD) that sets up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills.

Defaults (Cont)

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

Enter a user-defined code (00/WT) that indicates the type of data being entered within the supplemental database. The code is often an abbreviation for the data that it represents. For example, *EC* might represent engineering change.

Copying Parent Work Orders

This section provides an overview of work order copying and discusses how to:

- Copy work orders.
- Update copied work orders.

Understanding Work Order Copying

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

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

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

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

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

- Record types.

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

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

Forms Used to Copy Parent Work Orders

Form Name	FormID	Navigation	Usage
Work With Work Orders	W48201F	Work Order Processing (G4811), Scheduling Workbench	Update copied work orders or access work orders to copy.
Enter Work Orders	W48014A	On the Work With Work Orders form, find and select the parent work order. Then click the Copybutton. Alternatively, to copy a work order as well as the parts and labor lines, select Copy WO Details (copy work order details) from the Row menu.	Copy work orders, or copy work orders as well as their corresponding parts and labor lines, from a parent work order to a new work order.

Copying Work Orders

Access the Enter Work Orders form.

Complete any fields that must contain unique information. Leave the remaining fields blank so that the system can complete them with values from the parent work order.

If you click the Copy button, the system provides default information from the parent work order for those fields that you left blank.

If you select the WO Details row exit, the system also copies the parts list, labor detail, and record types from the original work order to the new work order.

After defining the work order, click Cancel to access the Work With Work Orders form, where you can update the new work order.

Updating Copied Work Orders

Access the Work With Work Orders form.

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

Creating Work Orders for a Project

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

- Create project work orders.
- Set processing options for Project Setup (P48015).

Understanding Project Work Orders

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

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

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

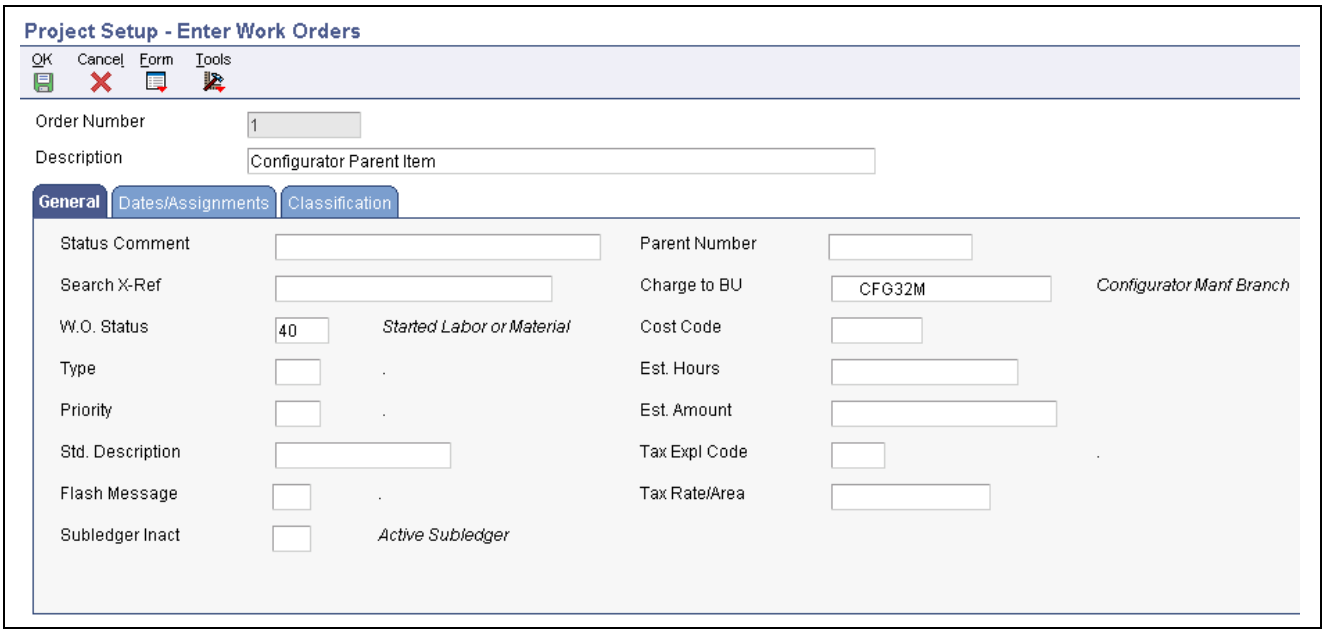
Use processing options to specify which work order detail form appears when you want to enter additional work order information. You can then enter additional information about each work order, such as status comments or an extended description of the task.

Form Used to Create Work Orders for a Project

Form Name	FormID	Navigation	Usage
Project Setup	W48015A	Simple Project Management (G4812), Project Setup	Access forms to create project work orders.
Enter Work Orders	W48014A	On Project Setup, select a work order, and select WO Detail (work order detail) from the Row menu.	Create project work orders.

Creating Project Work Orders

Access the Enter Work Orders form.



Enter Work Orders form

After you complete the fields and then clickOK, the system creates the project for the work orders that you entered.

To locate and revise any of the unique information for project work orders, select Project Setup from the menu again, and then, on Project Setup, click Find. You can revise any fields that must contain unique information (rather than default information from the parent work order). You can also enter any additional information, such as category codes and record types, to the work order.

Job or BU (job or business unit)

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

Business unit security can prevent you from locating business units for which you have no authority.

Task

Enter a user-defined name or remark.

Hours

Enter the estimated hours that are budgeted for this work order.

Setting Processing Options for Project Setup (P48015)

Use these processing options to supply default values for the Project Setup program.

Processing

1. Enter a '1' to default the manager and supervisor based on the values for category codes 1, 2 or 3.

Enter the data selection value. A special facility has been provided to allow selection of multiple specific values. When you enter *VALUES* in the selection field, a special screen appears that allows you to enter up to 45 specific values. If you specify **VALUES* in multiple selections of the original display, you will be prompted for multiple values lists.

Enter the value **BLANKS* if you are searching on a blank value. You cannot leave the values field blank to search on blanks as it will default to **ALL*.

Enter the value **ZEROS* when searching for amounts equal to zero.

The **RANGE* keyword displays a special screen that allows you to enter a range of values (for example, from 1 to 50). The first value must be less than the second value. If it is equal or greater than the second value, it will not work.

If you want to select all values for a field, enter **ALL*.

2. Enter the defaults for the following fields:

Enter the default values for these fields:

a. Type.

A user-defined code (00/TY) that indicates the classification of a work order or engineering change order. You can use work order type as a selection criterion for work order approvals.

b. Priority.

A user-defined code (00/PR) that indicates the relative priority of a work order or engineering change order in relation to other orders. A processing option for some forms lets you enter a default value for this field. The value then appears automatically in the appropriate fields on any work order that you create on those forms and on the Project Setup form. You can either accept or override the default value.

c. Beginning Status.

A user-defined code (00/SS) that describes the status of a work order, rate schedule, or engineering change order. Any status change from 90 through 99 triggers the system to automatically update the completion date.

d. Phase (Category Code 1).

A user-defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.

Note. Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.

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e. Category Code 2

A user-defined code (00/W2) that indicates the type or category of a work order.

f. Categories Code 3

A user-defined code (00/W3) that indicates the type or category of the work order.

Program

1. Enter version for P48014 (if left blank version ZJDE0001 will be used)

Enter a user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection 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.

CHAPTER 5

Processing Work Orders

This chapter provides an overview of work order processing and discusses how to:

- Find work orders.
- Approve work orders.
- Revise work orders.
- Print work orders.
- Process work order charges.

Understanding Work Order Processing

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

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

  For example, you can indicate that parts have been ordered.
- Track the costs that are associated with the work order, such as parts and labor costs.

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

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

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

- Search for specific work orders or groups of work orders.
- Revise information, such as start date, priority, status, and so on, as work orders move through the life cycle and demands on the maintenance organization change.

- Review information about the parts lists for work orders.
- Print copies of work orders for use by maintenance people.
- Change the status of a work order to complete, indicating that the maintenance tasks have been performed.

Finding Work Orders

This section provides an overview of how to find work orders, lists prerequisites, and lists the forms used to located work orders.

Understanding How to Find Work Orders

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

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

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

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

Prerequisites to Finding Work Orders

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

- Work With Unscheduled Maintenance (P13UM).
- Work With Equipment Work Orders (P13220).
- Capacity Message Summary (P3301).
- PM Backlog (P12071).
- Work Order Parts Detail (P17730).

- Work Order Labor Detail (P17732).
- Work Order Inventory Issues (P31113).

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

Form Used to Locate Work Orders

Form Name	FormID	Navigation	Usage
Work With Work Orders	W48201F	Work Order Processing (G4811), Scheduling Workbench On the Work With Work Orders form, complete a field to locate a work order and click Find.	Locate work orders. Alternatively, you can complete any of the fields on any of the tabs to locate work orders.

Approving Work Orders

This section provides an overview of work order approval, lists prerequisites, and discusses how to review work order history.

Understanding Work Order Approval

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

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

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

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

Prerequisites for Work Order Approval

Before you approve work orders:

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

Forms Used to Approve Work Orders

Form Name	FormID	Navigation	Usage
Work Center	W012503F	Work Order Processing (G4811), Scheduling Workbench On the Work With Work Orders form, complete a field to locate a work order and click Find. Select the work order that you want to approve, and select Order Processing and then WO Approval from the Row menu.	On the Work Center form, use the messaging system to approve or reject the work order and to route it to the next responsible individual
Process Task Monitor	W98860B	Work Order Processing (G4811), Scheduling Workbench On the Work With Work Orders form, complete a field to locate a work order and click Find. Select the work order that you want to approve, and select Order Processing and then WO Approval Audit from the Row menu.	On the Process Task Monitor form, review any notes that the approver might have entered for the work order.

Reviewing Work Order History

Access the WO Approval Audit form.

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

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

You can also review any notes about the work order.

Revising Work Orders

This section provides an overview of work order revision and discusses how to revise work orders.

Understanding Work Order Revision

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

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

- Life cycle statuses.
- Planned start and completion dates.
- Percentage of work completed.
- Estimated hours to complete the work.

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

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

Form Used to Revise Work Orders

Form Name	FormID	Navigation	Usage
Enter Work Orders	W48014A	Work Order Processing (G4811), Scheduling Workbench On the Work With Work Orders form, to limit the search to a specific work order or group of work orders, complete any combination of fields on any of the tabs and click Find. Select the work order that you need to revise and click Select.	Revise work orders.

Revising Work Orders

Access the Enter Work Orders form.

Make any necessary revisions to the work order information. To update life cycle information, complete the W.O. Status field on the General tab and click OK.

W.O. Status (work order status) Enter a user-defined code (00/SS) that describes the status of a work order, rate schedule, or engineering change order. Any status change from 90 through 99 triggers the system to automatically update the completion date.

Printing Work Orders

This section discusses how to print a single work order.

Forms Used to Print Work Orders

Form Name	FormID	Navigation	Usage
Work With Work Orders	W48201F	Work Order Processing (G4811), Scheduling Workbench Find and select the work order to print, and select Print WO from the Row menu.	Print a single work order.
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry Find and select the work order to print, and select Print WO from the Row menu.	Print work orders for the Capital Asset Management system.
Work With Work Orders	W48201F	Daily Work Order Processing (G1712), Work Order Entry Find and select the work order to print, and select Print WO from the Row menu.	Print work orders for the Service Management system.

Printing a Single Work Order

Access the Work With Work Orders form.

Select the work order that you want to print, and then select Print WO from the Row menu. You can print a single work order when you need a copy of a work order. For example, shop personnel might need to print a copy of a work order for each piece of equipment that they service.

If you already know the work order number, you can quickly print the work order from the Scheduling Workbench program (P48201). You use processing options to specify which version of the Work Order Print program (R17714) or the Work Order Print program for Capital Asset Management (R48415) that the system uses to print the order.

Processing Work Order Charges

This section provides an overview of work order charges, lists prerequisites, and discusses how to:

- Add charges to work orders.
- Review charges by job or business unit.
- Review charges by work order.

- Set processing options for Work Order Cost (P48211).

Understanding Work Order Charges

This section discusses:

- Work order charges.
- Cross-system functionality.
- Speed code entry.

Work Order Charges

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

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

For example, using subledger accounting, you can:

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

Cross-System Functionality

You can add charges to a work order using any JD Edwards EnterpriseOne system that creates general ledger transaction records with subledgers. Guidelines include:

System	Description
Time and Labor; Inventory Management; and Accounts Payable	You can access Inventory Management and Accounts Payable by using selections on the Work Order Processing menu. To access Time and Labor, you need to enter the menu number (G05BT1) in the fast path. You must have installed these systems to use them with the Work Orders system.
Inventory Management	You can use the Inventory Issues program (P4112) to enter charges for inventory and materials for a work order.

Speed Code Entry

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

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

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

System	Account Number Entry
Accounts Payable	Enter a back slash, work order number, a period, and an object account number (\WO.object account) Example: \1919.SHOP
Inventory Management	Enter a back slash, work order number, a period, and an object account number (\WO.object account) Example: \1919.SHOP You must have installed these systems to use the Inventory Management system: • Inventory Base and Order Processing (system 40) • Inventory Management (system 41)
Time and Labor	Enter a back slash, work order number, and a period (\WO.) Example: \1919. You must have installed at least one of these systems: • Human Capital Management Foundation (system 05) • Stand-alone Time Accounting (system 05T) • Payroll (system 07) • Payroll (Canadian system 77) In addition, you must set up accounting rules for work orders.

Reviewing Charges by Work Order

You can review detailed charges for a work order. For example, for any charge for a work order, you can review this information:

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

- Inventory item number or description.

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

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

See Also

JD Edwards EnterpriseOne Inventory Management 9.0 Implementation Guide, "Working With Inventory Transactions"

JD Edwards EnterpriseOne Accounts Payable 9.0 Implementation Guide, "Processing Accounts Payable Vouchers"

Forms Used to Work with Charges to Work Orders

Form Name	FormID	Navigation	Usage
Speed Voucher Entry	W0411SVA	Work Order Processing (G4811), Accounts Payable Entry On the Batch Control form, complete any of the fields and click OK.	Add charges to work orders.
Work Order Cost by Job	W48210A	Simple Project Management (G4812), Work Order Cost by Job	Review charges by job or business unit.
Work With Work Order Cost	W48211A	Simple Project Management (G4812), Cost Detail	Review charges by work order.

Adding Charges to Work Orders

Access the Speed Voucher Entry form.

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

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

Account Number Enter a value that identifies an account in the general ledger. Use one of these formats to enter account numbers:

- Standard account number (business unit.object.subsidiary or flex format).
- Third GL number (maximum of 25 digits).

- Account ID number, which is an eight-digit number.
- Speed code, which is a two-character code that you concatenate to the AAI item SP.

  You can then enter the code instead of an account number.

The first character of the account number indicates its format. You define the account format in the General Accounting constants.

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.

Sub Type (subledger type) Enter a user-defined code (00/ST) that is used with the Subledger field to identify the subledger type and how the system performs subledger editing. On the User Defined Codes form, the second line of the description controls how the system performs editing. This is either hard-coded or user-defined. Values include:

A: Alphanumeric field, do not edit.

N: Numeric field, right justify and zero fill.

C: Alphanumeric field, right justify and blank fill.

Reviewing Charges by Job or Business Unit

Access the Work Order Cost by Job form.

To review detailed transaction information for a work order, select a record in the detail area, and then select Work Order Cost from the Row menu. To help control costs and increase productivity, you can review work order costs that are charged to a particular job or business unit. You can review a summary of these costs, or you can review the charges that are within a specific date range or ledger type. If you do not limit the search criteria, the system displays all work orders within the job or business unit, along with the estimated hours, actual hours, and costs for each work order.

Job or BU (job or business unit) Enter a value that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a job, project, work center, or branch/plant.

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

Business unit security can prevent you from locating business units for which you have no authority.

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.

Phase

Enter a user-defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.

To review accumulated totals for a work order, complete the From Date/Period field and click Find. The system displays accumulated totals, beginning with the first work order in the phase that you select.

Note. Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.

From Date/Period

Enter the beginning date of the range in a search. If you do not specify a beginning date, the system uses the current date.

Thru Date/Period

Enter the ending date for the period that you want to review. If you leave this field blank, the system uses the ending date of the current period specified for the company.

Reviewing Charges by Work Order

Access the Work With Work Order Cost form.

After you complete the fields, and click Find, the system displays details about each work order transaction.

Setting Processing Options for Work Order Cost (P48211)

These processing options supply default values for the Work Order Cost program.

Defaults

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

1. Ledger Type

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

Versions

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

1. Work Order Backlog (P48201) Version

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

2. Inventory Issues (P31113) Version

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

3. Time Entry (P051121) Version	Specify the version that the system uses for the Speed Time Entry program (P051121). If you leave this processing option blank, the system uses the ZJDE0001 version.

CHAPTER 6

Performing Global Updates

This chapter discusses how to:

- Update phase and equipment numbers.
- Purge closed work orders.

Updating Phase and Equipment Numbers

This section provides an overview of updates for phase and equipment numbers, lists prerequisites, and discusses how to run the Update Phase/Equip No. in G/L program.

Understanding Updates for Phase and Equipment Numbers

If you post work order transactions to the general ledger and then change the equipment number and the phase code on the work order, you should run the Update Phase/Equip No. in G/L program to ensure that the Account Ledger table (F0911) reflects the most current work order information. You can use this program to change the phase code and equipment number on multiple work orders. You can also use this program to enter a value in the phase field on many general ledger transactions.

Prerequisites

Before you update phase and equipment numbers:

- Back up the Work Order Master File table (F4801).
- Do not access or modify the F4801 table while you run the Update Phase/Equip No. in G/L program.

Running the Update Phase/Equip No. in G/L Program

From Advanced & Technical Operations (G4831), select Update Phase/Equip No. in G/L.

Purging Closed Work Orders

This section provides an overview of work order purges and discusses how to run the Work Order Purge program.

Understanding Work Order Purges

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

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

Running the Work Order Purge Program

From Advanced & Technical Operations (G4831), select Work Order Purge.

CHAPTER 7

Understanding Workflow for Work Orders

This chapter provides overviews of workflow management and workflow processes.

Understanding Workflow Management

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

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

In addition, the system enables you to:

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

A workflow process contains activities and related subprocesses that are specific to a particular function that you want to automate. The Work Orders system includes predefined workflow processes that are specific to the work order life cycle. You can modify or add to these processes, if necessary. Typically, you need to customize workflow processes to meet the needs of the organization. An example of a predefined process for Work Orders is the process for work order approval.

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

Understanding Workflow Processes

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

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

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

Workflow Routes

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

Workflow Processing Rules

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

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

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

Workflow Activities

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

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

Primary Data Structures

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

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

Attribute Data Structures

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

See *JD Edwards EnterpriseOne Tools 8.98 Workflow Tools Guide*

APPENDIX A

Delivered Workflow for JD Edwards EnterpriseOne Work Orders

This appendix discusses the delivered workflow for JD Edwards EnterpriseOne Work Orders.

See Also

JD Edwards EnterpriseOne Tools 8.98 Workflow Tools Guide

Delivered Workflow for JD Edwards EnterpriseOne Work Orders

This section discusses the JD Edwards EnterpriseOne Work Orders workflow.

Work Order Activity Rules

This section discusses the Work Order Activity Rules workflow.

Description

Workflow Description	The system sends approval messages for status changes based on the approval type, work order type, and estimated amount.
Workflow Trigger	Changing the estimated amount or status on a work order.
Workflow Action	The system sends an approval message to a user-defined distribution list. The status is not changed until the change has been approved.

Workflow Objects

System	48
Workflow Object Name	WOACTRULES
Object IDs	W17714A, W13714A, W13714B, W90CD002A
Event Descriptions / Function Names	Post Button Clicked, Post OK Button Clicked, Save Changes, Post OK Button Clicked
Sequence / Line Numbers	239, 73, 115, 154

APPENDIX B

JD Edwards EnterpriseOne Work Orders Reports

This appendix provides an overview of work order reports and enables you to:

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

Understanding Work Order Reports

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

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

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

- Project phase.
- Managers assigned to a project.
- Messages and remarks that are assigned to work orders.
- Planned and actual hours for work orders.
- Start and end points of a project.
- Sequence of tasks for a project and any waiting time between tasks.
- Status of the work orders in a project.

Number of hours remaining or the number of hours charged over the original estimate for each work order in a project

You can print multiple work orders by using report selection criteria to specify the work orders that you want to print. To access the Work Order Print program (R48415), select the Work Order Print on the Work Order Processing menu (G4811).

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

Work Order Reports: A to Z

This table lists the work order reports, sorted alphanumerically by report ID:

Report ID and Report Name	Description	Navigation
R48492 Detailed Task Description	Lists the work orders that are included in a project.	Simple Project Management (G4812), Detailed Task Description
R48495 Project Status Summary	Review summary and detailed status information about all of the projects that are assigned to a specific manager.	Simple Project Management (G4812), Print Project Status Summary
R48496 Work Order Summary	Review summary information for tracking and comparing the progress of selected work orders. You can view work order summaries for the Work Orders system and the Capital Asset Management system.	Work Order Processing (G4811), Print Work Order Summary Work Order menu (G1316), Print WO Status Summary
R48497 Cost Summary	Review and analyze the costs and individual cost transactions that are associated with work orders. You can view cost summaries for the Work Orders system and the Capital Asset Management system.	Work Order Processing (G4811), Work Order Cost Summary Work Order menu (G1316), Print WO Cost Summary
R48498 Cost Detail	Review detailed information about the costs that you charge to work orders. You can view cost details for the Work Orders system and the Capital Asset Management system.	Work Order Processing (G4811), Cost Detail Work Order menu (G1316), Print WO Cost Detail

Selected Work Order Reports

Some reports include a more detailed description, as well as information about processing options. These reports are listed alphanumerically by report ID in this appendix.

R48492 - Printing the Detailed Task Description

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

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

- Any standard procedures

R48495 - Printing the Project Status Summary

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

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

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

Processing Options for Print Project Status Summary (R48495)

Use this processing option to supply the default value for Print Project Status Summary.

Print

1. Print 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.

If you leave this processing option blank, the system prints all ledger types.

R48496 - Printing the Work Order Summary Report

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

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

The system retrieves information for this report from these tables:

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

Processing Options for Work Order Summary Print (R48496)

Use these processing options to supply the default values for the Work Order Summary Print.

Print

1. Equipment Number Format

Specify how the system displays the equipment number. Values are:

Blank: Do not display the equipment number.

1: Display the asset number.

2: Display the unit number.

3: Display the serial number.

Defaults

1. Ledger Type

Specify the ledger type to be used when selecting records for actual hours from the Account Ledger (F0911) file. Enter a value from UDC 09/LT (Ledger Type). If you leave this processing option blank, the system uses ledger type *AA*.

R48497 - Print Cost Summary Reports

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

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

The system retrieves information for this report from these tables:

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

Processing Options for Print Work Order Cost Summary (R48497)

Use these processing options to supply the default values for Print Work Order Cost Summary.

Process

1. Date Rangea. From Date:

Specify the From Date that the system uses when including costs on this report. Use this processing option in conjunction with the Thru Date processing option.

If you leave this date blank, the system includes all costs with GL dates up to the Thru Date.

If you leave both the from and thru dates blank, the system includes all costs regardless of their GL dates.

1. Date Rangeb. Thru Date: Specify the Thru Date. that the system uses when including costs on this report. Use this processing option in conjunction with the From Date processing option.

If you leave this date blank, the system includes all costs with GL dates from the From Date forward.

If you leave both the from and thru dates blank, the system includes all costs regardless of their GL dates.

Defaults

1. Ledger Type Specify the ledger type to be used when selecting records for actual hours and amounts from the Account Ledger (F0911) file. Enter a value from UDC 09/LT (Ledger Type). If you leave this processing option blank, the system uses ledger type *AA*.

R48498 - Printing the Cost Detail Report

Print the Print WO Cost Detail report (R48498) to review detailed information about the costs that you charge to work orders. You use processing options to specify the date range for the report. The report includes:

- Actual hours and amounts charged to each work order.
- The general ledger date for each transaction.
- An explanation of each transaction.
- Total hours and amounts by phase code.

The system retrieves information for this report from these tables:

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

Processing Options for Print Work Order Cost Detail (R48498)

Use these processing options to supply the default values for Print Work Order Cost Detail.

Process

1. Date Rangea. From Date: Specify the From Date that the system uses when including costs on this report. Use this processing option in conjunction with the Thru Date processing option.

If you leave this date blank, the system includes all costs with GL dates up to the Thru Date.

If you leave both the from and thru dates blank, the system includes all costs regardless of their GL dates.

1. Date Rangeb. Thru Date:

Specify the Thru Date. that the system uses when including costs on this report. Use this processing option in conjunction with the From Date processing option.

If you leave this date blank, the system includes all costs with GL dates from the From Date forward.

If you leave both the from and thru dates blank, the system includes all costs regardless of their GL dates.

Defaults

1. Ledger Type

Specify the ledger type to be used when selecting records for actual hours and amounts from the Account Ledger (F0911) file. Enter a value from UDC 09/LT (Ledger Type). If you leave this processing option blank, the system uses ledger type *AA*.

Glossary of JD Edwards EnterpriseOne Terms

Accessor Methods/Assessors Java methods to “get” and “set” the elements of a value object or other source file.

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 JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.

alternate currency 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.

In JD Edwards 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.

Application Server Software that provides the business logic for an application program in a distributed environment. The servers can be Oracle Application Server (OAS) or WebSphere Application Server (WAS).

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.

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 JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.

Auto Commit Transaction A database connection through which all database operations are immediately written to the database.

back-to-back process A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.

batch processing A process of transferring records from a third-party system to JD Edwards EnterpriseOne.

In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.

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 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.

See also direct connect and store-and-forward.

best practices Non-mandatory guidelines that help the developer make better design decisions.

BPEL Abbreviation for *Business Process Execution Language*, a standard web services orchestration language, which enables you to assemble discrete services into an end-to-end process flow.

BPEL PM Abbreviation for *Business Process Execution Language Process Manager*, a comprehensive infrastructure for creating, deploying, and managing BPEL business processes.

Build Configuration File Configurable settings in a text file that are used by a build program to generate ANT scripts. ANT is a software tool used for automating build processes. These scripts build published business services.

build engineer An actor that is responsible for building, mastering, and packaging artifacts. Some build engineers are responsible for building application artifacts, and some are responsible for building foundation artifacts.

Build Program A WIN32 executable that reads build configuration files and generates an ANT script for building published business services.

business analyst An actor that determines if and why an EnterpriseOne business service needs to be developed.

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-JD Edwards 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 service EnterpriseOne business logic written in Java. A business service is a collection of one or more artifacts. Unless specified otherwise, a business service implies both a published business service and business service.

business service artifacts Source files, descriptors, and so on that are managed for business service development and are needed for the business service build process.

business service class method A method that accesses resources provided by the business service framework.

business service configuration files Configuration files include, but are not limited to, interop.ini, JDBj.ini, and jdelog.properties.

business service cross reference A key and value data pair used during orchestration. Collectively refers to both the code and the key cross reference in the WSG/XPI based system.

business service cross-reference utilities Utility services installed in a BPEL/ESB environment that are used to access JD Edwards EnterpriseOne orchestration cross-reference data.

business service development environment A framework needed by an integration developer to develop and manage business services.

business services development tool Otherwise known as JDeveloper.

business service EnterpriseOne object A collection of artifacts managed by EnterpriseOne LCM tools. Named and represented within EnterpriseOne LCM similarly to other EnterpriseOne objects like tables, views, forms, and so on.

business service framework Parts of the business service foundation that are specifically for supporting business service development.

business service payload An object that is passed between an enterprise server and a business services server. The business service payload contains the input to the business service when passed to the business services server. The business service payload contains the results from the business service when passed to the Enterprise Server. In the case of notifications, the return business service payload contains the acknowledgement.

business service property Key value data pairs used to control the behavior or functionality of business services.

Business Service Property Admin Tool An EnterpriseOne application for developers and administrators to manage business service property records.

business service property business service group A classification for business service property at the business service level. This is generally a business service name. A business service level contains one or more business service property groups. Each business service property group may contain zero or more business service property records.

business service property categorization A way to categorize business service properties. These properties are categorized by business service.

business service property key A unique name that identifies the business service property globally in the system.

business service property utilities A utility API used in business service development to access EnterpriseOne business service property data.

business service property value A value for a business service property.

business service repository A source management system, for example ClearCase, where business service artifacts and build files are stored. Or, a physical directory in network.

business services server The physical machine where the business services are located. Business services are run on an application server instance.

business services source file or business service class One type of business service artifact. A text file with the .java file type written to be compiled by a Java compiler.

business service value object template The structural representation of a business service value object used in a C-business function.

Business Service Value Object Template Utility A utility used to create a business service value object template from a business service value object.

business services server artifact The object to be deployed to the business services server.

business view A means for selecting specific columns from one or more JD Edwards EnterpriseOne application 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 JD Edwards 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 JD Edwards EnterpriseOne that appear on forms in the software.

check-in repository A repository for developers to check in and check out business service artifacts. There are multiple check-in repositories. Each can be used for a different purpose (for example, development, production, testing, and so on).

connector Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.

contra/clearing account A general ledger account in JD Edwards 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 JD Edwards EnterpriseOne Financial Management.

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.

correlation data The data used to tie HTTP responses with requests that consist of business service name and method.

cost assignment The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.

cost component In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).

credentials A valid set of JD Edwards EnterpriseOne username/password/environment/role, EnterpriseOne session, or EnterpriseOne token.

cross-reference utility services Utility services installed in a BPEL/ESB environment that access EnterpriseOne cross-reference data.

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.

cXML A protocol used to facilitate communication between business documents and procurement applications, and between e-commerce hubs and suppliers.

database credentials A valid database username/password.

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 artifacts Artifacts that are needed for the deployment process, such as servers, ports, and such.

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 JD Edwards 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.

duplicate published business services authorization records Two published business services authorization records with the same user identification information and published business services identification information.

embedded application server instance An OC4J instance started by and running wholly within JDeveloper.

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 JD Edwards 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 JD Edwards 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 JD Edwards EnterpriseOne.

Enterprise Service Bus (ESB) Middleware infrastructure products or technologies based on web services standards that enable a service-oriented architecture using an event-driven and XML-based messaging framework (the bus).

EnterpriseOne administrator An actor responsible for the EnterpriseOne administration system.

EnterpriseOne credentials A user ID, password, environment, and role used to validate a user of EnterpriseOne.

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 development client Historically called "fat client," a collection of installed EnterpriseOne components required to develop EnterpriseOne artifacts, including the Microsoft Windows client and design tools.

EnterpriseOne extension A JDeveloper component (plug-in) specific to EnterpriseOne. A JDeveloper wizard is a specific example of an extension.

EnterpriseOne process A software process that enables JD Edwards 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. JD Edwards 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.

EnterpriseOne resource Any EnterpriseOne table, metadata, business function, dictionary information, or other information restricted to authorized users.

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.

explicit transaction Transaction used by a business service developer to explicitly control the type (auto or manual) and the scope of transaction boundaries within a business service.

exposed method or value object Published business service source files or parts of published business service source files that are part of the published interface. These are part of the contract with the customer.

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 "business unit."

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 users 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.

foundation A framework that must be accessible for execution of business services at runtime. This includes, but is not limited to, the Java Connector and JDBj.

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.

HTTP Adapter A generic set of services that are used to do the basic HTTP operations, such as GET, POST, PUT, DELETE, TRACE, HEAD, and OPTIONS with the provided URL.

instantiate A Java term meaning "to create." When a class is instantiated, a new instance is created.

integration developer The user of the system who develops, runs, and debugs the EnterpriseOne business services. The integration developer uses the EnterpriseOne business services to develop these components.

integration point (IP) The business logic in previous implementations of EnterpriseOne that exposes a document level interface. This type of logic used to be called XBPs. In EnterpriseOne 8.11, IPs are implemented in Web Services Gateway powered by webMethods.

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.

interface table See Z table.

internal method or value object Business service source files or parts of business service source files that are not part of the published interface. These could be private or protected methods. These could be value objects not used in published methods.

interoperability model A method for third-party systems to connect to or access JD Edwards EnterpriseOne.

in-your-face-error In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.

IServer service 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 JD Edwards EnterpriseOne appears 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 JD Edwards EnterpriseOne 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 JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards 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 JD Edwards 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 JD Edwards EnterpriseOne.

JDENET A JD Edwards EnterpriseOne 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 JD Edwards EnterpriseOne supported platforms.

JDeveloper Project An artifact that JDeveloper uses to categorize and compile source files.

JDeveloper Workspace An artifact that JDeveloper uses to organize project files. It contains one or more project files.

JMS Queue A Java Messaging service queue used for point-to-point messaging.

listener service A listener that listens for XML messages over HTTP.

local repository A developer's local development environment that is used to store business service artifacts.

local standalone BPEL/ESB server A standalone BPEL/ESB server that is not installed within an application server.

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 JD Edwards EnterpriseOne software runs.

MailMerge Workbench An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.

Manual Commit transaction A database connection where all database operations delay writing to the database until a call to commit is made.

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 JD Edwards 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 JD Edwards 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 JD Edwards 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.

Middle-Tier BPEL/ESB Server A BPEL/ESB server that is installed within an application server.

Monitoring Application An EnterpriseOne tool provided for an administrator to get statistical information for various EntepriseOne servers, reset statistics, and set notifications.

named event rule (NER)

Encapsulated, reusable business logic created using event rules, rather that 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.

nota fiscal

In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.

nota fiscal factura

In Brazil, a nota fiscal with invoice information.

See also *nota fiscal.*

Object Configuration Manager (OCM)

In JD Edwards 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 JD Edwards 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 JD Edwards EnterpriseOne data for summarization and report generation.

Output Stream Access (OSA)

An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

package

JD Edwards 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 snapshot 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 JD Edwards 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.

Pathcode Directory

The specific portion of the file system on the EnterpriseOne development client where EnterpriseOne development artifacts are stored.

patterns
General repeatable solutions to a commonly occurring problem in software design. For business service development, the focus is on the object relationships and interactions. For orchestrations, the focus is on the integration patterns (for example, synchronous and asynchronous request/response, publish, notify, and receive/reply).

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 JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne 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 JD Edwards 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.

Production Published Business Services Web Service
Published business services web service deployed to a production application server.

program temporary fix (PTF)
A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.

project
In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

promotion path
The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* 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.

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 business service
EnterpriseOne service level logic and interface. A classification of a published business service indicating the intention to be exposed to external (non-EnterpriseOne) systems.

published business service identification information
Information about a published business service used to determine relevant authorization records. Published business services + method name, published business services, or *ALL.

published business service web service
Published business services components packaged as J2EE Web Service (namely, a J2EE EAR file that contains business service classes, business service foundation, configuration files, and web service artifacts).

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 JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards 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 JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event
A message triggered from EnterpriseOne application logic that is intended for external systems to consume.

refresh
A function used to modify JD Edwards 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.

Rt-Addressing
Unique data identifying a browser session that initiates the business services call request host/port user session.

rules
Mandatory guidelines that are not enforced by tooling, but must be followed in order to accomplish the desired results and to meet specified standards.

quote order
In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.

secure by default
A security model that assumes that a user does not have permission to execute an object unless there is a specific record indicating such permissions.

Secure Socket Layer (SSL)
A security protocol that provides communication privacy. SSL enables client and server applications to communicate in a way that is designed to prevent eavesdropping, tampering, and message forgery.

SEI implementation
A Java class that implements the methods that declare in a Service Endpoint Interface (SEI).

selection
Found on JD Edwards EnterpriseOne 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.

serialize
The process of converting an object or data into a format for storage or transmission across a network connection link with the ability to reconstruct the original data or objects when needed.

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. The application also updates the Server Plan detail record to reflect completion.

Service Endpoint Interface (SEI) A Java interface that declares the methods that a client can invoke on the service.

SOA Abbreviation for *Service Oriented Architecture*.

softcoding A coding technique that enables an administrator to manipulate site-specific variables that affect the execution of a given process.

source repository A repository for HTTP adapter and listener service development environment artifacts.

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 JD Edwards 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.

SSL Certificate A special message signed by a certificate authority that contains the name of a user and that user's public key in such a way that anyone can "verify" that the message was signed by no one other than the certification authority and thereby develop trust in the user's public key.

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.

superclass An inheritance concept of the Java language where a class is an instance of something, but is also more specific. "Tree" might be the superclass of "Oak" and "Elm," for example.

supplemental data 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.

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 JD Edwards EnterpriseOne systems.

table access management (TAM) The JD Edwards 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 JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table conversion An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards 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 JD Edwards 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 JD Edwards EnterpriseOne.

three-way voucher match In JD Edwards 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 processing method A method related to the management of a manual commit transaction boundary (for example, start, commit, rollback, and cancel).

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 authentication An authentication mechanism in which both client and server authenticate themselves by providing the SSL certificates to each other.

two-way voucher match In JD Edwards 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 identification information User ID, role, or *public.

User Overrides merge Adds new user override records into a customer's user override table.

value object A specific type of source file that holds input or output data, much like a data structure passes data. Value objects can be exposed (used in a published business service) or internal, and input or output. They are comprised of simple and complex elements and accessories to those elements.

variance In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, 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.

versioning a published business service Adding additional functionality/interfaces to the published business services without modifying the existing functionality/interfaces.

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 JD Edwards EnterpriseOne 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.

Web Service Description Language (WSDL) An XML format for describing network services.

Web Service Inspection Language (WSIL) An XML format for assisting in the inspection of a site for available services and a set of rules for how inspection-related information should be made.

web service proxy foundation Foundation classes for web service proxy that must be included in a business service server artifact for web service consumption on WAS.

web service softcoding record An XML document that contains values that are used to configure a web service proxy. This document identifies the endpoint and conditionally includes security information.

web service softcoding template An XML document that provides the structure for a soft coded record.

Where clause The portion of a database operation that specifies which records the database operation will affect.

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.

wizard A type of JDeveloper extension used to walk the user through a series of steps.

workbench A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.

work day calendar In JD Edwards EnterpriseOne Manufacturing, 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 JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne 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 JD Edwards EnterpriseOne for responses.

XML List An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.

XML Service An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.

XML Transaction An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.

XML Transaction Service (XTS) Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.

Z table A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.

Z transaction Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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