

JD Edwards EnterpriseOne Applications

Change Management Implementation Guide

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Preface

Welcome to the JD Edwards EnterpriseOne Applications Change Management Implementation Guide.

Audience

This guide is intended for implementers and end users of the JD Edwards EnterpriseOne Change Management system.

JD Edwards EnterpriseOne Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called: *JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation 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 Applications Financial Management Fundamentals Implementation Guide*.

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Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main

documentation overview page by searching for the document ID, which is 1308615.1, or by using this link:

<https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1308615.1>

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Indicates field values.
<i>Italics</i>	Indicates emphasis and JD Edwards EnterpriseOne or other book-length publication titles.
Monospace	Indicates a JD Edwards EnterpriseOne program, other code example, or URL.

Introduction to JD Edwards EnterpriseOne Change Management

This chapter contains the following topics:

- [Section 1.1, "JD Edwards EnterpriseOne Change Management Overview"](#)
- [Section 1.2, "JD Edwards EnterpriseOne Change Management Integrations"](#)
- [Section 1.3, "JD Edwards EnterpriseOne Change Management Implementation"](#)

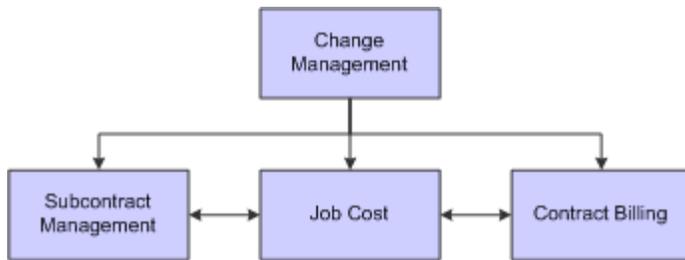
1.1 JD Edwards EnterpriseOne Change Management Overview

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

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

1.2 JD Edwards EnterpriseOne Change Management Integrations

The JD Edwards EnterpriseOne Change Management system integrates with these JD Edwards EnterpriseOne systems from Oracle:

Figure 1–1 EnterpriseOne Change Management Integrations

The JD Edwards EnterpriseOne Change Management system works with other JD Edwards EnterpriseOne systems. We discuss integration considerations in the implementation chapters in this implementation guide. Supplemental information about third-party application integrations is located on the My Oracle Web site at <https://support.oracle.com/>.

1.2.1 JD Edwards EnterpriseOne Subcontract Management

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

1.2.2 JD Edwards EnterpriseOne Job Cost

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

1.2.3 JD Edwards EnterpriseOne Contract and Service Billing

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

1.2.4 JD Edwards EnterpriseOne General Accounting

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

1.3 JD Edwards EnterpriseOne Change Management Implementation

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

In the planning phase of the implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information.

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

See *JD Edwards EnterpriseOne Tools Software Updates Guide*.

1.3.1 Global Implementation Steps

The suggested global implementation steps for JD Edwards EnterpriseOne Change Management are:

1. Set up companies, fiscal date patterns, and business units.
See "Setting Up Organizations" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.
2. Set up accounts, and the chart of accounts.
See "Creating Chart of Accounts" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.
3. Set up the General Accounting constants.
See "Setting Up the General Accounting System" in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.
4. Set up multicurrency processing, including currency codes and exchange rates.
See "Setting Up General Accounting for Multicurrency Processing" in the *JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide*.
See "Setting Up Exchange Rates" in the *JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide*.
5. Set up ledger type rules.
See "Setting Up Ledger Type Rules for General Accounting" in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.
6. Enter address book records.
See "Entering Address Book Records" in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*.

1.3.2 JD Edwards EnterpriseOne Change Management Implementation Steps

The implementation steps for the JD Edwards EnterpriseOne Change Management system are:

1. Set up user-defined codes.
See [Setting Up UDCs for EnterpriseOne Change Management](#).
2. Set up change request detail status codes.
See [Setting Up Change Request Detail Status Codes](#).
3. Set up job-specific user-defined codes.
See [Setting Up Job-Specific UDCs](#).

4. Set up automatic accounting instructions (AAIs).

See "Setting Up AAIs for General Accounting" in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.

5. Set up column versions.

See [Understanding Change Requests](#).

Understanding the EnterpriseOne Change Management System

This chapter contains the following topics:

- [Section 2.1, "Change Management Process"](#)
- [Section 2.2, "Tables and Descriptions"](#)

2.1 Change Management Process

This section discusses:

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

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

2.1.1 Creating Change Requests

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

2.1.2 Creating Planned Change Orders and Change Orders

After you create change requests, you can group related change requests by attaching them to planned change orders (PCOs). You can group related PCOs by attaching

them to change orders (COs). Grouping change requests and PCOs makes it easier to locate information about related changes.

2.1.3 Modifying Change Requests

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

2.1.3.1 Audit Trail

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

2.1.3.2 Requotes

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

2.1.3.3 Status Updates

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

2.1.3.4 Reviewing Modifications

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

2.2 Tables and Descriptions

The JD Edwards EnterpriseOne Change Management system uses these tables:

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

Table	Description
Change Request Details table (F5311)	Stores detail information for change requests, such as: <ul style="list-style-type: none"> ■ Detail status code for each cost, revenue, and subcontract account ■ Line number ■ Ledger type ■ Requote number ■ Account cost code ■ Account cost type ■ Original, quoted, final, and best amounts for each account type ■ Subcontract number for subcontract accounts ■ Closed flag
Planned Change Order Master table (F5314)	Stores information for PCOs, such as: <ul style="list-style-type: none"> ■ Status ■ Closed flag ■ CO number of the change order to which the PCO is attached
Change Order Master table (F5315)	Stores information regarding a change order, such as: <ul style="list-style-type: none"> ■ Status ■ Closed flag
Business Unit Master table (F0006)	Stores job master information, including the job description, job number, job type, company, and category codes.
Account Ledger table (F0911)	Stores detail transactions in the general ledger. One record exists per transaction. The Account Ledger table tracks revisions to account balance amounts and quantities by providing a detailed audit trail of transactions.
Purchase Order Detail File table (F4311)	Stores master information for subcontract management, including subcontract numbers and vendor addresses.
Change Request Detail Status Update table (F53101)	Stores the detail status codes for the ledger that the system updates with the amount type and quantity for cost, revenue, and subcontract accounts.
Log Master Revision table (F4303)	Tracks information for contracts, including: <ul style="list-style-type: none"> ■ Job number ■ Change request number ■ Log type ■ Log number ■ Status ■ Dates

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

Setting Up the EnterpriseOne Change Management System

This chapter contains the following topics:

- [Section 3.1, "Understanding EnterpriseOne Change Management System Setup"](#)
- [Section 3.2, "\(Optional\) Converting Change Management in JD Edwards World to JD Edwards EnterpriseOne"](#)
- [Section 3.3, "Setting Up the EnterpriseOne Change Management System"](#)

3.1 Understanding EnterpriseOne Change Management System Setup

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

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

Tasks	Descriptions
User-defined codes (UDCs)	Define customized codes that are appropriate for the business needs. For example, you can define codes that identify the priority of a change request, the type of change request, and planned change order (PCO) and change order (CO) statuses.
Change request detail status codes	Define approval stages for accounts on a change request. You can associate account ledgers with detail status codes so that the system updates ledgers when you update the detail status code for an account on a change request.
Job-specific UDCs	Define codes that are specific to a job. For example, if you have several phases of a job, you can define a code for each phase of a job. You can then use the codes in each change request so that you know to which phase of the job the change request belongs.
Ledger type master	Define monetary decimals at the ledger type level. You can set up ledger types at the job or company level.

Tasks	Descriptions
Automatic accounting instructions (AAIs)	Define the AAIs (CMxx) that the system uses when you commit a subcontract account in a change request detail line to the JD Edwards EnterpriseOne Subcontract Management system.
Column versions	View the saved column versions that you can use when you access the Change Request Entry program.

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

3.2 (Optional) Converting Change Management in JD Edwards World to JD Edwards EnterpriseOne

This section contains an overview of the conversion process and discusses how to convert Change Management in JD Edwards World to JD Edwards EnterpriseOne.

3.2.1 Understanding the Conversion Process

To migrate existing data from Change Management in JD Edwards World to JD Edwards EnterpriseOne, you must convert specific JD Edwards World Change Management files to JD Edwards EnterpriseOne tables. To assist you in the conversion process, there are conversion programs, which function with JD Edwards World version A7.3, service pack 12.

You must run the conversion programs on the Change Management Table Conversions menu (G53411) in this order:

1. Convert Detail Status Code (R8953101)
2. Convert Change Request Header (R895301B)
3. Convert Change Request Detail (R895311)

This table describes the conversion programs that convert JD Edwards World files to JD Edwards EnterpriseOne Change Management tables:

Conversion Program Name	Conversion Program Number	Data Converted	JD Edwards World Table Number	JD Edwards EnterpriseOne Table Name	JD Edwards EnterpriseOne Table Number
Convert World F53001 to EO F53101	R8953101	Change Request Detail Status Codes	F53001	Change Request Detail Status Update	F53101
Convert World F5301 to EO F5301B	R895301B	Change Request Master information (job number, description, status, and so forth.)	F5301	Change Request Master	F5301B

Conversion Program Name	Conversion Program Number	Data Converted	JD Edwards World Table Number	JD Edwards EnterpriseOne Table Name	JD Edwards EnterpriseOne Table Number
Convert World F5302 to EO F5311	R895311	Change Request Details (subcontract information, line number, ledger type, and so forth.)	F5302	Change Request Details	F5311

After you run the Convert World F53001 to EO F53101 program, you must verify the data converted successfully. Use the Detail Status Code Update program (P53101) to verify the data is in the JD Edwards EnterpriseOne Change Management system. You can run this program again if necessary or enter the data manually.

When you finish running the conversion programs, JD Edwards recommends that you access the Change Request Entry program (P5310) on the Change Management Setup menu (G5311) to ensure that the data exists in the JD Edwards EnterpriseOne Change Management system.

The conversion programs do not remove the JD Edwards World data from the tables after the conversion is finished.

3.2.2 Prerequisites

Before you complete the tasks in this section:

- Install JD Edwards EnterpriseOne.
- Convert job master information.
See JD Edwards EnterpriseOne Applications Job Cost Implementation Guide.
- If you use Subcontract Management programs in the JD Edwards World Change Management system, convert these subcontracts to JD Edwards EnterpriseOne subcontracts.
See JD Edwards EnterpriseOne Applications Subcontract Management Implementation Guide.
- If you use Contract Billing programs in the JD Edwards World Change Management system, convert these contracts to JD Edwards EnterpriseOne Contract Billing contracts.
See JD Edwards EnterpriseOne Applications Contract and Service Billing Implementation Guide.
- Set the processing options for Convert World F5302 to EO F5311 (R895311) prior to running this conversion program.

3.3 Setting Up the EnterpriseOne Change Management System

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

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

3.3.1 Understanding Detail Status Codes

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

For each detail status code, define:

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

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

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

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

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

See Also:

- "Setting Up Ledger Type Rules for General Accounting" in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.
- "Setting Up AAIs for General Accounting" *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.
- [Working with Detail Status Codes](#).

3.3.2 Forms Used to Set Up the EnterpriseOne Change Management System

Form Name	FormID	Navigation	Usage
Work With User Defined Codes	W0004AA	Enter UDC in the Fast Path.	Set up UDCs.
Change Request Status Code Revisions	W53101B	Change Management System Setup (G5341), Detail Status Code Update On Work With Change Requests, click Add.	Set up change request detail status codes.

Form Name	FormID	Navigation	Usage
Job Specific UDCs Detail	W53005D	Change Management User Defined Codes (G5342), Job Specific UDCs On Work With Job Specific UDC's enter the job number, code, and click Add.	Set up job-specific UDCs.

3.3.3 Setting Up UDCs for EnterpriseOne Change Management

You can use these UDCs as part of the identifying information of a change request. They are informational only.

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

See Also:

- *JD Edwards EnterpriseOne Tools Foundation Guide.*

3.3.4 Setting Up Change Request Detail Status Codes

Access the Change Request Status Code Revisions form.

Figure 3-1 Change Request Status Code Revisions form

The screenshot shows a web-based form titled "Detail Status Code Update - Change Request Status Code Revisions". The form has two tabs: "Work With Status Codes" and "Change Request Status Code Revisions". The "Change Request Status Code Revisions" tab is selected. The form contains several input fields and legends:

- Status:** Input field containing "A".
- Record Type:** Input field containing "B". To the right, a legend reads "B=Cost, O=Revenue, S=Subcontract".
- Description:** Input field containing "Approved".
- Amount Ledger Type:** Input field containing "JA".
- Unit Ledger Type:** Input field containing "JU".
- Amount/Qty Type:** Input field containing "F". To the right, a legend reads "O=Original, Q=Quoted, F=Final, B=Best".

At the top of the form, there are navigation icons (back, forward, search, etc.) and a "Tools" button.

Status

Enter a code defined by the user that specifies the status of an account in a change request detail line. This code is used in the approval process of the change request to determine if the system updates a ledger in the Account Balances table (F0902), to define which ledger type is updated, and to define which amount type the system uses to update the ledger.

Record Type

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

B: Budget, or Cost.

O: Owner, or Revenue.

S: Subcontract, or Buyout.

Blank: Supplies the default value of **B**.

Amount Ledger Type

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

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

Amount/Qty Type (amount/quantity type)

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

O: Original

Q: Quoted

F: Final

B: Best

3.3.5 Setting Up Job-Specific UDCs

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

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

Job Number

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

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

Code Field

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

User Def Code (user defined code)

Enter a list of codes for a specific UDC list.

Description 2

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

Special Handling

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

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

Hard Coded

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

Y: The UDC is hard-coded.

N: The UDC is not hard-coded.

A check mark indicates that the UDC is hard-coded.

Creating Change Requests

This chapter contains the following topics:

- [Section 4.1, "Understanding Change Requests"](#)
- [Section 4.2, "Entering Basic Change Requests"](#)
- [Section 4.3, "Copying Account Balances"](#)
- [Section 4.4, "Entering Change Request Fee Calculations"](#)
- [Section 4.5, "Reviewing Change Requests"](#)
- [Section 4.6, "Revising Change Requests"](#)

4.1 Understanding Change Requests

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

- Organize change requests.
- Include appropriate components in a change request.
- Use detail status codes.

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

See [Creating Change Management Hierarchy](#).

4.1.1 Mobile Enterprise Applications for Change Requests (Release 9.1 Update)

The following mobile applications are available for entering, reviewing, and approving change requests on a mobile device:

- Change Request Entry Smartphone Application
- Change Request Entry Tablet Application

These applications require system administrator configuration before they are available to individual users. Contact your system administrator to determine whether these applications are available for use.

Additionally, see the following topics in the JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide:

- Change Request Entry Mobile Applications
- Change Request Approval Mobile Applications

4.1.2 Organizing Change Requests

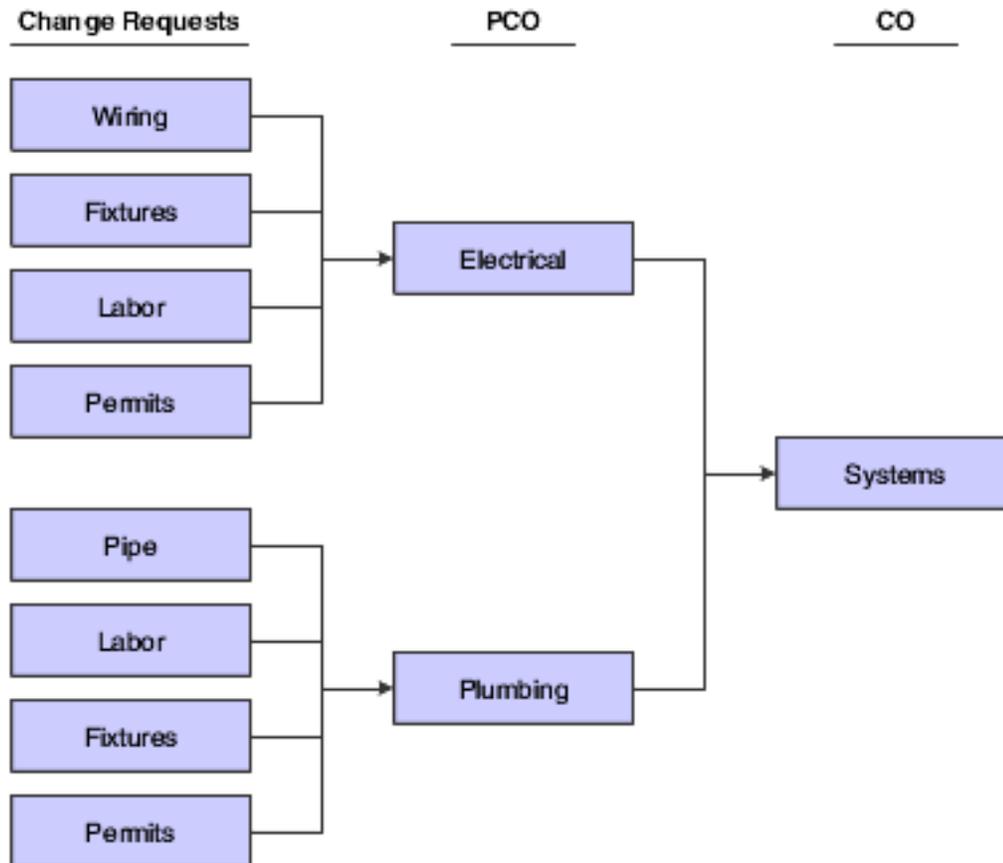
Before you create any change requests for a job, you should decide how detailed you want the change request hierarchy to be. You can use a high level or a low level of detail. Whether you decide to use a high level or low level of detail, you can still attach related change requests to PCOs, and related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

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

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

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

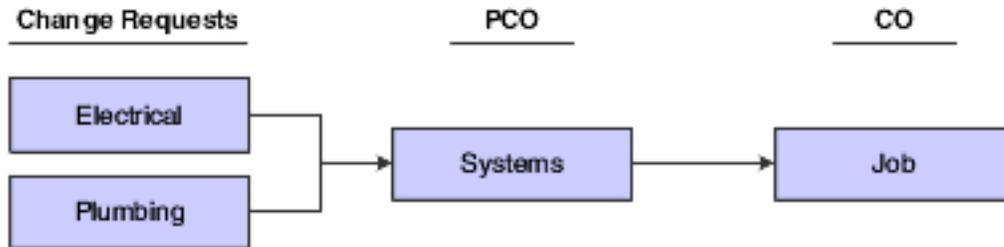
Figure 4-1 Hierarchy with high level of detail



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

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

Figure 4–2 Hierarchy with low level of detail



4.1.2.1 Using Hierarchy Detail Levels

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

See [Understanding Global Status Updates](#).

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

Detail Level	Benefits and Drawbacks
High-detail level	<p>Benefits include:</p> <ul style="list-style-type: none"> ■ All line items are very closely related. ■ It might be easier to use the Global Status Update program as all of the line items are closely related. ■ PCO reports display totals for all change requests attached to the PCO. <p>Drawbacks include that you must review many change requests to find the one with the line items that you need.</p>

Detail Level	Benefits and Drawbacks
Low-detail level	<p>Benefits include:</p> <ul style="list-style-type: none"> ■ Fewer change requests. ■ If all lines and accounts on the change request move through the approval process at the same time, you can save time by using the Global Status Update program to change them to the next status. <p>Drawbacks include:</p> <ul style="list-style-type: none"> ■ Many line items on each change request. ■ Sorting through line items might be difficult. ■ When using the Global Status Update program when accounts on a change request do not move through the approval process as a group, you must be careful not to change detail status codes that you do not want to change.

4.1.3 Including Appropriate Components in a Change Request

A change request always includes:

- A job number to link the change request to a job.
- A description to define the type of change request.
- Account distribution information for each line item to provide details about the accounts that are affected by the change.

The account distribution information includes the type of account (cost, revenue, subcontract) and the original, quoted, and final amounts for the account types that are displayed. You can enter positive and negative monetary amounts.

- A detail status code to provide the approval stage of the change request.

In addition, a change request can include:

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

4.1.4 Using Detail Status Codes

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

- Which ledgers in the JD Edwards EnterpriseOne Job Cost system to update.
- The record type (cost, revenue, or subcontract).

- The amount and quantity type of the line item (original, quoted, final, or best).

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

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

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

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

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

See Also:

- [Setting Up Change Request Detail Status Codes.](#)

4.2 Entering Basic Change Requests

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

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

4.2.1 Understanding Change Request Entry

Change requests track changes to a job as it progresses. You can enter a single line item or multiple line items for each change request. Typically, you set up a change request that relates to a specific aspect of the job. For example, if the job is to construct an office

building, change request 1 might be for tracking foundation details, change request 2 for framing details, and so on.

Change requests consist of:

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

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

4.2.1.1 Fields on the Change Request Entry Form

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

Fields	Descriptions
Requote	Displays the number of the requote that is currently displayed.
Blank field to the right of Requote	Displays the date when the requote was created.
Job Totals Best	Displays the best total amounts for the cost, revenue, and subcontract accounts for the entire job.
Totals (Original, Quoted, Final, or Best)	Displays the total amounts for the cost, revenue, and subcontract accounts for the change request that is currently displayed. If the Cost, Revenue, or Subcontract fields to the right of the Totals field are blank, then the change request does not have amounts for those fields. You select whether the system displays the total of the original, quoted, final, or best amounts by setting a processing option.
Column Version	Displays the name of the column version that you entered on the Default tab for the processing options.

Fields	Descriptions
Grid Column fields	<p>The columns that you select on the Display tab on the Change Order Entry form affect which columns that you can work with when:</p> <ul style="list-style-type: none"> ■ Entering account information. ■ Copying amounts and units. ■ Using the Windows/Messages-Copy, Unequal, Change, Status program (P53WIN). ■ Selecting accounts from the G/L Account Search form. ■ Selecting accounts from the G/L Inquiry option on the Row menu. ■ Accessing the JD Edwards EnterpriseOne Subcontract Management system from the Change Request Entry form. <p>For example, if you select Cost Column, the system displays only cost account information on the Change Request Entry form, and does not permit you to inquire about revenue accounts or subcontract accounts. You cannot access the JD Edwards EnterpriseOne Subcontract Management system or the JD Edwards EnterpriseOne Contract and Service Billing system.</p>
Unavailable fields	<p>The system does not allow fields to be unavailable for changes. For example, after you commit a subcontract account to the JD Edwards EnterpriseOne Subcontract Management system in final mode, the system restricts all of the subcontract fields, making them unavailable for editing.</p>

4.2.1.2 Form Menu Features

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

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

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

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

4.2.1.3 Row Menu Features

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

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

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

4.2.1.4 Change Request Information

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

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

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

4.2.1.5 Technical Considerations

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

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

4.2.1.6 Related Tasks

This table discusses tasks that are related to change requirements:

Tasks	Descriptions
Changing account numbers	<p>You can change an account number for a line item only if no detail status code with a ledger type attached to it has been assigned to the account in the line item.</p>
Deleting line item information	<p>You can delete all line item information for a change request only if no ledger types are attached to any detail status codes in any line items.</p>
Deleting change requests	<p>You can delete a change request only if you have not entered information for the change request in any of these tables:</p> <ul style="list-style-type: none"> ■ Account Balances (F0902) ■ Account Ledger (F0911) ■ Change Request Details Table (F5311) ■ Planned Change Order Master Table (F5314) ■ Log Master (F4303) ■ Log Revision (F4305)

4.2.2 Understanding Account Distribution Information

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

- Cost or budget information that is associated with the company.
- Revenue information that is associated with the owner.
- Subcontract information that is associated with suppliers.

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

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

- Enter multiple accounts.

When you enter multiple accounts, the system creates a separate line item for each account that you select from the G/L Account Search form. The system also supplies the description and unit of measure that are associated with the account. The system adds the line items, starting with the first blank line on the Change Request Entry form.

- Enter accounts to line items one at a time.

This option is useful when you want to add accounts after the line items have been created. For example, if you access a line item that has only a cost account, you can manually add the information for a revenue account to the line.

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

See Also:

- *JD Edwards EnterpriseOne Tools Foundation Guide.*
- "Setting Up Job Master Records" in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide.*
- [Organizing Change Requests.](#)
- [Copying Account Balances.](#)
- [Creating a PCO.](#)
- [Creating a CO.](#)
- [Understanding Detail Status Codes.](#)
- [Understanding Global Status Updates.](#)
- [Modifying Subcontract Logs.](#)
- [Change Management Reports.](#)

4.2.3 Prerequisites

Before you complete the tasks in this section:

- Verify that the job exists in the JD Edwards EnterpriseOne Job Cost system.

- Verify that detail status codes are set up in the Change Request Detail Status Update Table (F53101).

See [Understanding Detail Status Codes](#).

4.2.4 Forms Used to Enter Basic Change Requests

Form Name	FormID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup (G5311), Change Request Entry. On the Work With Change Requests form, enter a job number and click Add.	Enter basic change request information.
Change Request Entry	W5310B	Change Management Setup (G5311), Change Request Entry. On the Work With Change Requests form, enter a job number, click Find, and select the request.	Enter cost account information.
Change Request Entry	W5310B	Change Management Setup (G5311), Change Request Entry. On the Work With Change Requests form, enter a job number and a number in the Skip to Change Request field, and then click Find. Select the request.	Enter revenue account information. Enter subcontract account information. Enter general detail line information.

4.2.5 Setting Processing Options for Change Request Entry (P5310)

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

4.2.5.1 Edit

Specify system requirements for account numbers and dates. You can use the Acct Master Pick option on the Form menu to list and select account numbers for the job. The system also completes the general ledger date when you use Acct Master Pick. Alternatively, you can use the Search button in the Cost, Revenue, and Subcontract fields to select an account number, or you can manually enter the account number. When you select an account number or manually enter one, the system completes the G/L Date field if you do not enter a date.

1. Account Numbers and Dates

Specify whether the system always requires master account numbers and general ledger dates. Values are:

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

1: Always require account numbers and dates.

4.2.5.2 Audit

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

1. Audit Trail - F0911

Specify how the system creates audit trail records in the Account Ledger table (F0911). Values are:

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

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

2: Do not create audit trail records.

4.2.5.3 Default

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

1. Owner Change Required

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

Specify the default value for the general ledger date. Values are:

Blank: Use the date from the company fiscal date patterns.

1: Use the current system date.

2. G/L Date (general ledger date)

Specify the default value for the general ledger date. Values are:

Blank: Date from company fiscal date pattern.

1: Date is system date.

3. Subledger and Subledger Type

Specify the default value for the subledger and the subledger type. Values are:

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

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

4. Cost, Revenue, Subcontract Totals

Specify how the system calculates change request totals. Values are:

1: Use original amounts.

2: Use quoted amounts.

3: Use final amounts.

4: Use best amounts.

Blank: Use best amounts to calculate change request totals.

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

If you enter a final amount alone or in any combination with other amounts, the system uses the final amount as the best amount.

If you enter a quoted and an original amount, but do not enter a final amount, the system uses the quoted amount as the best amount.

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

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

Specify the number that the system uses as the PCO number when you create a new PCO. Values are:

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

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

6. Column Version

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

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

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

7. Restrict Column Version

Specify whether to restrict changes and additions to column versions. Values are:

Blank: Restrict changes and additions.

1: Allow changes and additions.

8. Default Cost Status Code

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

9. Default Revenue Status Code

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

10. Default Subcontract Status Code

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

11. Default Header Status Code

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

4.2.5.4 Amounts

Use these processing options to specify subcontract amounts.

1. Revenue amounts updated from subcontract amounts

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

Blank: Does not update revenue amounts.

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

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

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

2. Display when Revenue and Subcontract amounts unequal and 4. Display when Cost and Subcontract amounts unequal

Specify whether the system displays a message when revenue and subcontract amounts are unequal, or when cost and subcontract amounts are unequal. Values are:

Blank: Do not display.

1: Display.

3. Cost amounts updated from Subcontract amounts

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

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

Blank: Does not update cost amounts.

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

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

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

4.2.5.5 Contract

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

1. Return Contract Number

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

Blank: Do not return a contract number.

1: Return the subcontract number.

2: Return the billing contract number.

3: Return the subcontract and the billing contract numbers.

4.2.5.6 Contract Commit

Specify how the system commits a contract on a detail line on a change request to the JD Edwards EnterpriseOne Contract and Service Billing system.

1. Process Mode

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

0: Proof mode.

1: Final mode.

2. Change Request Status Code for Revenue

Specify the detail status code that the system assigns to a contract account in a detail line when you commit the line item to the JD Edwards EnterpriseOne Contract and Service Billing System. Verify that the status code has been set up in the Change Request Detail Status Code Update program (P53101).

4.2.5.7 Subcontract Commit

Specify how the system commits a subcontract account on a detail line on a change request to the JD Edwards EnterpriseOne Subcontract Management system.

1. Process Mode

Specify whether the system runs the Subcontract Commit program in proof or final mode. You should run the program in proof mode before you run it in final mode so that you can view the report that the system generates. After you review the report and make any needed changes, you can run the program in final mode. When you run the program in final mode, the system updates the appropriate tables and generates a report. Values are:

Blank: Proof mode.

1: Final mode.

2. Subcontract Change Order Number

Specify the subcontract change order number that the system assigns to the subcontract account in a detail line on a change request. The subcontract change order number is the number assigned to a change order that was created in the JD Edwards EnterpriseOne Subcontract Management system. Values are:

Blank: Use the number from the existing subcontract change order.

1: Use the value that you specify in the Subcontract Change Order Number processing option.

Note: You can only use the number from the existing subcontract change order if no payments have been made for the subcontract. If payments have been made and you do not specify a value in the Subcontract Change Order Number processing option, the system uses the next available number.

3. Subcontract Detail Line Item

Specify how the system updates the Purchase Order Detail table (F4311) when you commit a subcontract account in a detail line to the JD Edwards EnterpriseOne Subcontract Management system. Values are:

Blank: Create a new line item for a subcontract for the Purchase Order Detail table.

1: Update an existing line item for a subcontract for the Purchase Order Detail table. The amount committed replaces the current amount for that line item if no payments have been made.

4. G/L Account (general ledger account)

Specify the general ledger account to be used when the system commits a subcontract account in a detail line to the JD Edwards EnterpriseOne Subcontract Management system. Values are:

Blank: Use the existing account.

1: Use the account specified in the AAIs for JD Edwards EnterpriseOne Change Management.

5. Subcontract Status

Specify the detail status code that the system assigns to a subcontract account in a detail line when you commit the line item to the JD Edwards EnterpriseOne Subcontract Management system. Verify that the status code has been set up in the Change Request Detail Status Code Update program (P53101).

6. Log Revisions: Log Type

Specify the log type that the system assigns to a log.

7. Log Master (P4305) Version

Specify the version for the Logs Entry (P4305) program.

8. Log Revisions: Pay Effect

Specify the pay effect code that the system assigns to a log when the system creates a log. Values are:

Y: Issue warning message.

N: Do not issue warning message.

9. Subcontract/PO Entry (P4310)

Specify the version that the system uses when it commits a subcontract account. The commit process uses server XT4311Z1, which uses the version you select for P4310.

Before you specify a version, review the version's processing options to ensure that the version meets the requirements. If you leave this option blank, the system uses version ZJDE0015.

10. Terms Only Line Type

Specify a code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces, such as JD Edwards EnterpriseOne General Accounting, JD Edwards EnterpriseOne Job Cost, JD Edwards EnterpriseOne Accounts Payable, JD Edwards EnterpriseOne Accounts Receivable, and JD Edwards EnterpriseOne Inventory Management. It also specifies the conditions under which a line prints on reports, and it is included in calculations. Values include:

S: Stock item

J: Job cost

N: Nonstock item

F: Freight

T: Text information

M: Miscellaneous charges and credits

W: Work order

4.2.5.8 Versions

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

1. Planned Change Order Entry (P5314)

Specify the version that the system uses for change request reports when you access the Planned Change Order Entry program.

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

2. Change Order Entry (P5315)

Specify the version that the system uses when you access the Change Order Entry program. Before you specify a version, review the version's processing options to

ensure that the version meets the needs of the business. The default version is ZJDE0001.

3. Change Request Summary/Detail

Specify whether the system generates the Change Request report as a detail or summary report. Values are:

Blank: Print a detail report.

1: Print a summary report.

Version

Specify the version that the system uses when you access the Change Request Summary/Detail Report (R534011/R53411).

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

4.2.6 Entering Basic Change Request Information

Access the Change Request Entry form.

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

5. Select the columns that you want before entering additional data for the change request.

You can select accounts only for the columns that are displayed.

6. Select Acct Master Pick from the Form menu.
7. On the G/L Account Search form, click Find.

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

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

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

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

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

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

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

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

9. Click the Additional Selections tab and complete these optional fields:
 - Remark
 - Reference 1
 - Reference 2
 - Reference 3
10. Click the Addresses/Dates tab and complete these optional fields:
 - Originator
 - Requested By
 - Approval Date
 - Planned Start

- Planned Finish
- User Defined Date #1
- User Defined Date #2
- User Defined Date #3

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

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

Note: Category Code - Change Orders fields 6 through 10 are job-specific UDCs.

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

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

Job Number

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

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

Change Request

Enter the number assigned to the change request for a particular job.

Status Code

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

Owner Change Req (owner change required)

Enter a code that indicates whether owner approval is required before work can begin on the change request. You can use this code to indicate whether the work is in or out of scope of the original contract. If the work

is out of scope, owner approval is required. This field is for reporting purposes only and does not affect the processing of the change request. Values are:

Y: Requires owner approval

N: Does not require owner approval

Blank: The field is ignored

Type

Enter a UDC (53/TY) that indicates the type of change request.

Priority Code

Enter a UDC (53/PR) that indicates the priority of the change request. For a list of values, click the **Search** button next to the field. Examples of priority codes include:

H: High

M: Medium

L: Low

U: Urgent

Column Version

Enter a code that indicates a specific version. A version is a user-defined set of specifications. These specifications control how applications and reports run.

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

Remark

Enter a generic field that you use for a remark, description, name, or address.

Reference 1

Enter any number used to identify a specific source document or originating entry that might be related to a change request.

Originator

Enter the address book number of the person who originated the change request. The system verifies this number against the Address Book.

Requested By

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

Resp Manager (responsible manager)

Enter the address book number of the person who approves the change request.

Original Date

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

Approval Date

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

Planned Start

Enter the date when the item or line of work is to start.

Planned Finish

Enter the date when the item or line of work is to finish.

User Defined Date #1

Enter a user-defined date in Julian format.

Initiated By

Enter a UDC (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.

Area

Enter a UDC (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.

Category Code 3

Enter a UDC (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.

UDC Code One

Enter a UDC (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.

Required Days

Enter the number of days required for the change.

Required/Extended Days

Enter the number of days required for the change.

Extended Days

Enter the estimated number of days that the change will extend the work to be performed.

Quote Due Date

Enter the date that a quote is due for a line item in the change request.

Quote Receive Date

Enter the date that a quote is received for a line item in the change request.

Chg. Req. Detail Closed (change request detail closed)

Enter a code that indicates whether a change request detail line, PCO, or CO is closed. No further action is necessary. Values are:

0: Open

1: Closed

4.2.7 Entering Cost Account Information

Access the Change Request Entry form.

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

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

Cost Sts (cost status)

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

Cost LT (cost ledger type)

Enter a UDC (09/LT) that identifies a ledger type.

Cost Original

Enter the original amount for a cost change request detail item.

Cost Quoted

Enter the quoted amount for a detail item for a request for a cost change.

Cost Final

Enter the final amount for a detail item for a request for a cost change.

Cost PT (cost pricing type)

Enter the pricing type associated with cost information. Change requests typically use these pricing types:

U: Unit Price Change

L: Lump Sum Change

Cost Original Unit Rate and Cost Quoted Unit Rate

Enter the original cost of a unit rate that is associated with a change request detail line item.

Cost Final Unit Rate

Enter the final cost for a unit rate that is associated with a change request detail line item.

Cost UM (cost unit of measure)

Enter a UDC (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.

Cost Quoted Quantity and Cost Final Quantity

Enter the quoted quantity or the final quantity associated with a detail line item for a request for a cost change.

Cost Original Quantity

Enter the original cost quantity for a line item in the change request.

Cost Account Number

Enter the combined business unit, object, and subsidiary portions of an account number.

Cost Description

Enter a description, remark, name or address.

Cost Subledger

Enter a code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so on. If you enter a subledger, you must also specify the subledger type.

Cost Sub Type

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

A: Alphanumeric field. Do not edit.

N: Numeric field. Right-justify and zero fill.

C: Alphanumeric field. Right-justify and blank fill.

Cost G/L Date (cost general ledger date)

Enter the general ledger date associated with the line item for cost information.

Cost Best to Zero

Enter a code that indicates whether the best cost amount for a detail line item for a change request should be zero.

4.2.8 Entering Revenue Account Information

Access the Change Request Entry form.

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

Rev Sts (revenue status)

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

Revenue LT (revenue ledger type)

Enter a UDC (09/LT) that identifies a ledger type.

Revenue Original

Enter the original amount for a revenue change request detail item.

Revenue Quoted and Revenue Final

Enter the quoted revenue amount or the final revenue amount for a line item in the change request.

Rev TO (revenue terms-only)

Enter a code that specifies whether this change affects contract terms other than price, such as an extension in time or a change in schedule. Values are:

Y: Yes.

N: No.

If you create a terms-only change request (Rev TO = Y), you do not need to enter a final amount to commit the change request.

Rev PT (revenue pricing type)

Enter the pricing type associated with revenue information. Change requests normally use these pricing types:

U: Unit Price Change

L: Lump Sum Change

Revenue Original Unit Rate and Revenue Quoted Unit Rate

Enter the original revenue unit rate or the quoted revenue unit rate associated with a change request detail line item.

Revenue Final Unit Rate

Enter the final revenue unit rate for a line item in the change request.

Revenue UM (revenue unit of measure)

Enter a UDC (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.

Revenue Original Quantity, Revenue Quoted Quantity, and Revenue Final Quantity

Enter the original revenue quantity, the quoted revenue quantity, or the revenue final quantity for a line item in the change request.

Revenue Cost Account Number

Enter the combined business unit, object, and subsidiary portions of an account number.

Revenue Cost Description

Enter a description, remark, name or address.

Revenue Subledger

Enter a code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so on. If you enter a subledger, you must also specify the subledger type.

Revenue Sub Type

Enter a UDC (00/ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system edits the subledger. This can be either hard coded or user-defined. For example, values include:

A: Alphanumeric field. Do not edit.

N: Numeric field. Right-justify and zero fill.

C: Alphanumeric field. Right-justify and blank fill.

Revenue G/L Date (revenue general ledger date)

Enter the general ledger date associated with the line item for revenue information.

Rev Best to Zero (revenue best to zero)

Enter a code that indicates whether the best revenue amount for a line item in the change request should be zero.

Contract Number

Enter the contract number used in the JD Edwards EnterpriseOne Contract and Service Billing system. This number, along with the contract type and contract company, provides the link between the JD Edwards EnterpriseOne Contract and Service Billing and JD Edwards EnterpriseOne Change Management systems. It will allow you to copy revenue information for a change request into the JD Edwards EnterpriseOne Contract and Service Billing system.

Contract Type

Enter the contract type tied to a contract in the JD Edwards EnterpriseOne Contract and Service Billing system. This code is defined in UDC (00/DT). This field, along with the contract number and the contract company, link the change request to the JD Edwards EnterpriseOne Contract and Service Billing system.

Contract Company

Enter a number that, with the document number, document type and general ledger date, uniquely identifies an original document, such as invoice, voucher, or journal entry.

If you use the Next Numbers by Company/Fiscal Year feature, the Automatic Next Numbers program (X0010) uses the document company to retrieve the correct next number for that company.

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

Contract Change Order

Enter the change number of the contract. The change order number of the base contract is always initialized to 000. Each time you enter a change order for a contract, the system automatically increases the change order number by one.

For example, the base contract is the change order number 000, the first change order is 001, the second is 002, and so on.

Owner Number

Enter the address book number to which the system posts billing and accounts receivable transactions.

Contract Commit Flag

Enter a code that indicates whether a detail line item on a change request was committed to the JD Edwards EnterpriseOne Contract and Service Billing system. The system displays P if the detail line was committed in proof mode, and displays F if the detail line was committed in final mode.

Date Contract Pushed

Enter the date that a revenue detail record was pushed or committed to Contract Billing.

4.2.9 Entering Subcontract Account Information

Access the Change Request Entry form.

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

Sub Sts (subcontract status)

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

Subcontract LT (subcontract ledger type)

Enter a UDC (09/LT) that identifies a ledger type.

Subcontract Original

Enter the original amount for a subcontract change request detail item.

Subcontract Quoted and Subcontract Final

Enter the quoted subcontract amount or the final subcontract amount for a line item in the change request.

Sub TO (subcontract terms-only)

Enter a code that specifies whether this change affects contract terms other than price, such as an extension in time or a change in schedule. Values are:

Y: Yes.

N: No.

Sub PT (subcontract pricing type)

Enter the pricing type associated with subcontract information. Change requests typically use these pricing types:

U: Unit Price Change

L: Lump Sum Change

Subcontract Original Unit Rate, Subcontract Quoted Unit Rate, and Subcontract Final Unit Rate

Enter the original subcontract unit rate, the quoted subcontract unit rate, or the final subcontract unit rate for a line item in the change request.

Subcontract UM (subcontract unit of measure)

Enter a UDC (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.

Subcontract Original Quantity, Subcontract Quoted Quantity, and Subcontract Final Quantity

Enter the original subcontract quantity, the quoted subcontract quantity, or the final subcontract quantity for a line item in the change request.

Subcontract Account Number

Enter the combined business unit, object, and subsidiary portions of an account number.

Subcontract Description

Enter a description, remark, name or address.

Subcontract Subledger

Enter a code that identifies a detailed, auxiliary account within a general ledger account. A subledger can be an equipment item number or an address book number. If you enter a subledger, you must also specify the subledger type.

Subcontract Sub Type

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

A: Alphanumeric field. Do not edit.

N: Numeric field. Right-justify and zero fill.

C: Alphanumeric field. Right-justify and blank fill.

Sub G/L Date (subcontract general ledger date)

Enter the general ledger date associated with the line item for subcontract information.

Sub Best to Zero (subcontract best to zero)

Enter a code that specifies whether the best subcontract amount for a line item in the change request should be zero.

Subcontract Contract No (subcontract contract number)

Enter the contract number used in the JD Edwards EnterpriseOne Subcontract Management system. This number, along with the contract type and contract company, provides the link between the JD Edwards EnterpriseOne Contract Management and JD Edwards EnterpriseOne Change Management systems. It enables you to copy buyout information for a change request into the JD Edwards EnterpriseOne Subcontract Management system.

Subcontract Contract Type

Enter a UDC (00/DT) that is associated with a contract in the JD Edwards EnterpriseOne Subcontract Management system. This field, along with the contract number and the contract company, links the change request to the JD Edwards EnterpriseOne Subcontract Management system.

Subcontract Order Suffix

Enter the change order number associated with a contract in the JD Edwards EnterpriseOne Contract and Service Billing system. This field and the contract number, contract type, and company number is used to link the change request to the JD Edwards EnterpriseOne Contract and Service Billing system. These values must exist in the Contract Header table (F5201).

Subcontract Company

Enter a number that, along with contract number and contract type, uniquely identifies a subcontract.

Subcontract Line No (subcontract line number)

Enter a number that identifies multiple occurrences (such as line numbers on a purchase order or other document). Generally, the system assigns this number, but in some cases you can override a system-assigned number.

Supplier Number

Enter the address book number of the supplier or subcontractor.

Subcontract Commit Flag

Enter a code that indicates whether a detail line item on a change request was committed to the JD Edwards EnterpriseOne Subcontract Management system. The system displays P if the detail line was committed in proof mode, and displays F if the detail line was committed in final mode.

Date Subcontract Pushed

Enter the date that a subcontract detail record was committed to the JD Edwards EnterpriseOne Subcontract Management system.

4.2.10 Entering General Detail Line Information

Access the Change Request Entry form.

4.3 Copying Account Balances

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

4.3.1 Understanding Account Balance Copy

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

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

- Two detail lines with cost accounts.
- Two lines with revenue accounts.
- Two lines with both subcontract and revenue accounts.

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

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

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

4.3.2 Form Used to Copy Account Balances

Form Name	FormID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup (G5311), Change Request Entry. On the Work With Change Requests form, enter a job number and a number in the Skip to Change Request field, and then click Find. Select the request.	Copy account balances from one amount or unit type (original or quoted) to another.

4.3.3 Copying Account Balances

Access the Change Request Entry form.

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

4.4 Entering Change Request Fee Calculations

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

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

4.4.1 Understanding Change Request Fee Calculations

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

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

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

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

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

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

4.4.2 Form Used to Enter Change Request Fee Calculations

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

4.4.3 Setting Processing Options for Change Request Fee Calculation (P5320)

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

4.4.3.1 Default

Status Code

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

4.4.4 Entering Change Request Fee Calculations

Access the Fee Calculation form.

Figure 4–3 Fee Calculation form

The screenshot shows a software interface titled "Change Request Entry - fee calculation". At the top, there are fields for "Job Number" (1620) and "Change Request" (1). Below this is a section for "Quotation Cost Subtotal" with fields for "Account Number", "Status" (Q), and "Total" (17,000.00). The next section is "Fee", which includes fields for "Account Number", "Status" (Q), "Fee %", "Fixed Fee", and "Total". The final section is "Overhead", which includes fields for "Account Number", "Status" (Q), "Overhead %", "Fixed Fee", and "Total".

Account Number

Enter the combined business unit, object, and subsidiary portions of an account number.

Status

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

Total

Enter the final revenue amount for a line item in the change request.

Fee % (fee percent) and Overhead % (overhead percent)

Enter the mark-up calculation percentage for a fee or for overhead.

4.5 Reviewing Change Requests

This section provides an overview of change request review.

4.5.1 Understanding Change Request Review

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

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

4.5.1.1 Locating Change Management Information

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

Information	Operation
The detail status code that moves the line item to the approved stage.	Access the Work With Status Codes form (W53101A).
The ledger type that is associated with a detail status code.	Access the Work With Status Codes form. Click Find to display existing codes. Detail status codes: Determining associated ledger type. Ledgers: Determining associated detail status code.
The master account that is associated with a line item.	View individual accounts, or all accounts for a change request or job. <ul style="list-style-type: none"> ■ To view the account for a specific line item, on the Change Request Entry form, select G/L Inquiry from the Row menu. ■ To view accounts for all of the lines in a change request or in a job, select Account Inquiry from the Change Management Inquiries menu (G5312).
The amount type (original, quoted, final, best) that the system is totaling.	Review the Cost, Revenue, Subcontract Totals processing options for the Change Request Entry program.
The approval stage for all change requests for a job.	You can view the detail status codes for cost, revenue, and subcontract accounts. The status codes represent the approval stage of the change request. To view the detail status codes, select Change Management Inquiries menu (G5312), Account Inquiry. Complete the job number, and then click Find to display all of the change requests and their codes.
The original, quoted, and final amounts for the change request.	To easily view amounts for all types of accounts on a change request, select Additional Details from the Row menu on the Change Request Entry form, and view the amounts on the Cost Details, Revenue Details, and Subcontract Details tabs.
The change requests that are not attached to a PCO.	The change requests that are not attached to a PCO appear on the Change Request Search form. On the Planned Change Order Entry form, select Select Change Req. from the Form menu, and then click Find on the Change Request Search form. Change requests: Unattached.
The column versions that are available for change request entry.	Select Column Versions - User Overrides from the Change Management System Setup menu (G5341). On the Work With User Overrides form, enter P5310 in the QBE field for Application, and then press Enter.

Information	Operation
The invoice number, and to whom funds were paid or received.	On the Change Request Entry form, select a line item, and then select G/L Inquiry from the Row menu.
The original budget for an account.	You can compare the original job budget for an account to the amounts that are charged to the account by accessing the account ledger. Select G/L Inquiry from the Row menu, and then select the type of account that you want to view.

See Also:

- [Setting Up Change Request Detail Status Codes.](#)
- "Understanding Basic Job Inquiry" in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide.*
- "Setting Processing Options for Job Status Inquiry: Basic (P512100)" in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide.*

4.6 Revising Change Requests

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

- Revise change request amounts manually.
- Generate requotes.

4.6.1 Understanding Change Request Revisions

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

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

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

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

4.6.1.1 Revising Amounts

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

4.6.1.2 Requotes

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

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

Note: You can only change the last requote.

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

Deleting a requote does not affect any other requotes.

See Also:

- [Entering Basic Change Requests.](#)
- [Copying Account Balances.](#)
- [Generating Requotes.](#)

4.6.2 Form Used to Revise Change Requests or Generate Requotes

Form Name	FormID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup (G5311), Change Request Entry. On the Work With Change Requests form, enter the job number and click Find. Select a change request.	Revise amounts manually. Generate requotes.

4.6.3 Revising Change Request Amounts Manually

Access the Change Request Entry form.

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

Job Number

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

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

Cost Original

Enter the original amount for a cost change request detail item.

Cost Quoted and Cost Final

Enter the quoted amount or the final amount for a detail item for a request for a cost change.

Revenue Original

Enter the original amount for a revenue change request detail item.

Revenue Quoted, Revenue Final, and Revenue Final Quantity

Enter the quoted revenue amount, the final revenue amount, or the final revenue quantity for a line item in the change request.

Subcontract Original

Enter the original amount for a subcontract change request detail item.

Subcontract Quoted and Subcontract Final

Enter the quoted subcontract amount or the final subcontract amount for a line item in the change request.

4.6.4 Generating Requotes

Access the Change Request Entry form.

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

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

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

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

Creating Change Management Hierarchy

This chapter contains the following topics:

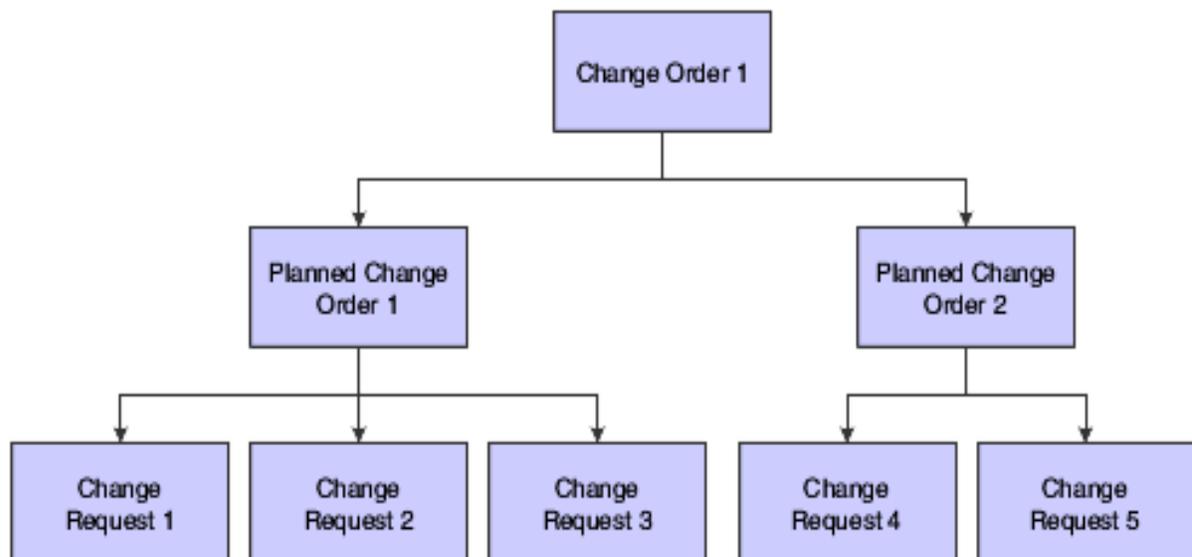
- [Section 5.1, "Understanding Change Management Hierarchy Creation"](#)
- [Section 5.2, "Understanding Status Codes for PCOs"](#)
- [Section 5.3, "Working with PCOs"](#)
- [Section 5.4, "Working with COs"](#)

5.1 Understanding Change Management Hierarchy Creation

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

This graphic illustrates a change management hierarchy:

Figure 5–1 Change management hierarchy



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

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

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

See Also:

- [Organizing Change Requests.](#)

5.2 Understanding Status Codes for PCOs

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

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

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

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

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

See Also:

- [Setting Up UDCs for EnterpriseOne Change Management.](#)

5.3 Working with PCOs

This section provides an overview of PCOs and discusses how to:

- Set processing options for the Planned Change Order Entry program (P5314).
- Create a PCO.
- Attach change requests to a PCO.

- Attach existing change requests.
- Create and attach new change requests.
- Delete PCO information.

5.3.1 Understanding PCOs

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

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

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

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

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

5.3.2 Understanding PCO Revision

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

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

When you revise PCOs, you can:

- Add or delete change requests.
- Change all header fields except:
 - The Planned Change Order field.
 - Fields that are unavailable for input.
 - Close the PCO.

5.3.3 Understanding PCO Deletion

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

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

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

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

5.3.4 Forms Used to Work With PCOs

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

5.3.5 Setting Processing Options for Planned Change Order Entry (P5314)

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

5.3.5.1 Defaults

Specify how the system generates the number for a new CO and to specify whether to create an audit trail.

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

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

1. Create CO Number (create change order number)

Specify the number the system assigns to a new CO when you create the CO. This processing option affects only COs that you create when you create a new CO from the Planned Change Order Entry (P5314) program. Values are:

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

1: Use the next available number.

2. Audit Trail - F0911

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

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

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

2: Do not create audit trail records.

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

Specify the default status code to be assigned to a PCO. Confirm that the code you enter has been set up in user-defined code (UDC) 53/PC (Planned Change Order Status).

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

Specify the status code for an approved PCO. When a PCO is at an approved status, the system runs the Global Status Update program. Ensure that the code that you enter has been set up in the UDCs for Planned Change Order Status (53/PC).

5. Cost Next Status, 6. Revenue Next Status, and 7. Subcontract Next Status

Specify the next detail status code for a cost account, a revenue account, or a subcontract account when the system runs the Global Status Update program. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

8. Deleted Header Status Code

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

9. Deleted Cost Status Code, 10. Deleted Revenue Status Code, and 11. Deleted Subcontract Status Code

Specify the updated status code for a cost account, revenue account, or a subcontract account when a planned changed order has been deleted. Confirm this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

5.3.5.2 Versions

Use these processing options to define:

1. Change Request Entry (P5310) and 2. Change Order Entry (P5315)

Specify the version that the system uses when you access the Change Request Entry program.

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

3. Planned Change Order Report

Specify whether the system generates the Planned Change Order report as a detail or summary report. Values are:

Blank: Print summarized information on the report.

1: Print detailed information on the report.

Version

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

5.3.6 Creating a PCO

Access the Planned Change Order Entry form.

Figure 5–2 Planned Change Order Entry form

Planned Change Order Entry - Planned Change Order Entry

Job Number: 1620 Birmingham Steel - Memphis Change Order: 1

Planned Change Order: 1 Foundation Closed Last PCO No.: 4

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

Requested By: 2428 Escalante, George Submitted Date: 08/05/05

Resp Manager: [] Approved Date: []

FINAL AMOUNTS Cost: 29,400.00 Revenue: 20,300.00 Subcontract: 5,300.00

QUOTED AMOUNTS Cost: 27,000.00 Revenue: 20,800.00 Subcontract: 5,000.00

Records 1 - 4									
<input type="checkbox"/>	<input type="checkbox"/>	Change Request	Req. No.	Header Description	Status Code	Owner Change	Type	Priority Code	Required Days
<input type="checkbox"/>	<input type="checkbox"/>		1	Foundation Materials	3	Y	I	M	
<input type="checkbox"/>	<input type="checkbox"/>		2	Foundation Labor	A	Y	S	M	
<input type="checkbox"/>	<input type="checkbox"/>		3	Foundation Equipment	A	Y	I	M	
<input type="checkbox"/>	<input type="checkbox"/>								

Planned Change Order

Enter a number that uniquely identifies a PCO for a particular job in the JD Edwards EnterpriseOne Change Management system. The system also links the PCO number to the change requests attached to the PCO so that you can identify the change requests that are associated with the PCO.

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

PCO Status Code (planned change order status code)

Enter a code that indicates the status of a PCO.

Header Description

Enter a user-defined name or remark.

Requested By

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

Required/Extended Days

Enter the number of days required for the change.

Submitted Date

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

Approved Date

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

5.3.7 Attaching Change Requests to a PCO

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

See Also:

- [Organizing Change Requests.](#)
- [Creating a PCO.](#)

5.3.8 Attaching Existing Change Requests

Access the Planned Change Order Entry form.

To attach existing change requests:

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

5.3.9 Creating and Attaching New Change Requests

Access the Planned Change Order Entry form.

To create and attach new change requests:

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

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

5. On Planned Change Order Entry, select Select Change Req. from the Form menu.

6. On Change Request Search, complete the Change Request field in the QBE row with the number of the change request that you created:
7. Select the change request and click Select.

The system adds the change request to the PCO.

See Also:

- [Entering Basic Change Request Information.](#)
- [Understanding Account Distribution Information.](#)

5.3.10 Deleting PCO Information

You can delete PCOs or delete change requests from a PCO.

5.3.10.1 Deleting PCOs

Access the Work With Planned Change Orders form.

To delete a PCO:

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

5.3.10.2 Deleting Change Requests

Access the Planned Change Order Entry form.

To delete a change request from a PCO:

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

5.4 Working with COs

This section provides an overview of COs and discusses how to:

- Set processing options for Change Order Entry (P5315).
- Create a CO.
- Attach PCOs to a CO.
- Delete COs.

5.4.1 Understanding COs

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

You create COs so that you can group PCOs together.

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

5.4.2 Understanding CO Revision

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

When you revise COs, you can:

- Add or delete PCOs.
- Change all header fields except:
 - The Change Order Number.
 - Fields that are unavailable for input.
 - The Close Flag.

5.4.3 Forms Used to Work With COs

Form Name	FormID	Navigation	Usage
Change Order Entry	W5315B	Change Management Setup (G5311), Change Order Entry. On the Work With Change Orders form, enter a job number and click Add.	Create a CO.
Change Order Entry	W5315B	Change Management Setup (G5311), Change Order Entry. On the Work With Change Orders form, enter a job number and click Find.	Attach PCOs.
Change Order Entry	W5315B	Change Management Setup (G5311), Change Order Entry. On the Work With Change Orders form, enter a job number and click Find. Select the CO to delete and click Select. To delete a CO, select Delete CO from the Form menu on Change Order Entry. To delete a PCO, select the PCO and then select Remove PCO from the Row menu on the Change Order Entry form.	You delete a CO only if the CO has not been approved or closed. You delete a PCO from a CO only if the CO has not been approved or if it is not closed.

5.4.4 Setting Processing Options for Change Order Entry (P5315)

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

5.4.4.1 Defaults

Specify how audit trail records are created.

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

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

1. Audit Trail - F0911

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

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

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

2: Do not create audit trail records.

2. Default CO Status Code

Specify the default status code, UDC 53/CS, to assign to a CO. Confirm that the code you enter has been set up in UDC 53/CS (Change Order Status).

3. CO Approved Status (change order approved status)

Specify the status code for an approved CO. When a CO is at an approved status, the system runs the Global Status Update program. Ensure that the code that you enter has been set up in the UDC for Change Order Status (53/CS).

4. Cost Next Status, 5. Revenue Next Status, and 6. Subcontract Next Status

Specify the next detail status code for a cost account or revenue account when the Global Status Update program is executed. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

7. PCO Header Status (planned change order header status)

Specify the PCO header status to which the system changes when you approve a CO. Before you approve the CO, you must confirm that the PCO header status code has been set up in the Planned Change Order Status UDC (53/PC).

5.4.4.2 Versions

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

1. Planned Change Order Entry (P5314)

Specify the version that the system uses when you access the Planned Change Order Entry program (P5314). Before you specify a version, review the version's processing options to ensure that the version meets the needs of the business. If you do not specify a version, the system uses version ZJDE0001 for applications, and uses XJDE001 for reports.

2. Change Order Report

Specify whether the report should include summarized or detailed information. Values are:

Blank: Print summarized information.

1: Print detailed information.

Version

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

5.4.5 Creating a CO

Access the Change Order Entry form.

Figure 5-3 Change Order Entry form

Change Order Entry - Change Order Entry Query: All Records

Job Number * 1620 Birmingham Steel - Memphis

Change Order 1 Structure Close Flag Last CO No. 1

CO Status Code S Submitted Required/Extended Days 8 3

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

Resp Manager 4802 Fraser, Carol Approval Date

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

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

PCO Number	PCO Description	PCO Sts	Requested By	Submitted Date	Resp Manager	Approved Date	PCO Approved Total
1	Foundation	S	2428	08/05/05			55,000.00
4	Framming	S	2428	08/05/05			244,200.00

Change Order

Enter a number that uniquely identifies a CO for a particular job in the JD Edwards EnterpriseOne Change Management system. The system also links the CO number to the PCOs that are attached to the CO so that you can identify the PCOs that are associated with the CO.

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

CO Status Code (change order status code)

Enter a code that indicates the status of a CO.

Requested By

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

Resp Manager (responsible manager)

Enter the address book number of the person who approves the change request.

Required/Extended Days

Enter the number of days required for the change.

Submitted Date

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

Approval Date

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

5.4.6 Attaching PCOs to a CO

Access the Work With Change Orders form.

To attach PCOs:

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

See Also:

- [Creating a PCO.](#)

5.4.7 Deleting COs

Access the Change Order Entry form.

Reviewing Change Requests

This chapter contains the following topics:

- [Section 6.1, "Understanding the Change Request Review Process"](#)
- [Section 6.2, "Reviewing Change Requests"](#)

6.1 Understanding the Change Request Review Process

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

6.1.1 Requotes

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

6.1.2 Logs

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

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

6.1.3 Accounts

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

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

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

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

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

6.1.4 General Ledger Information

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

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

6.1.5 Change Request for Jobs

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

- Account type
- Account code
- Ledger type
- Supplier

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

6.2 Reviewing Change Requests

This section discusses how to:

- Set processing options for Logs Entry program (P4305).
- Review requotes.
- Review logs.
- Review log hierarchy.
- Review accounts for a job.
- Review accounts for a line.
- Review general ledger information.
- Review change requests by job.

6.2.1 Forms Used to Review Change Requests

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

6.2.2 Setting Processing Options for Logs Entry Program (P4305)

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

6.2.2.1 Default

1. Contract Type

Specify the default contract type. You must enter a value that has been set up in UDC 00/DT.

2. Log View Option

Specify the default for the Log View option. You must enter a value that has been set up in UDC 43/VO.

6.2.2.2 Versions

1. Progress Payments (P4314)

Specify the version of Progress Payments that the system uses to determine how open and outstanding logs are displayed.

When you select a version, review the version's processing options to ensure that the version meets the needs of the business.

6.2.3 Reviewing Requotes

Access the Change Request Entry form.

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

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

6.2.4 Reviewing Logs

Access the Change Management Log Details form.

Figure 6–1 Change Management Log Details form

Log Type	Description	Log Status	Explanation -Remark-	Required Date	Pay Effect	Issue Date	Expired Date
T		N	002CR: 00000005		N	03/09/00	

See Also:

- "Working with Subcontract Logs" in the *JD Edwards EnterpriseOne Applications Subcontract Management Implementation Guide*.

6.2.5 Reviewing Log Hierarchy

Access the Logs Revisions form.

Figure 6–2 Logs Revisions form

Log Master - Logs Revisions									
Order Company: 00050									
Records 1 - 2									
<input type="checkbox"/>	<input type="checkbox"/>	Log Type	Description	Explanation -Remark-	Status Code	Pay Effect	Issue Date	Required Date	Expired Date
<input type="checkbox"/>	<input type="checkbox"/>	S	Submittal			N	06/01/05		05/31/06
<input type="checkbox"/>	<input type="checkbox"/>								

6.2.6 Reviewing Accounts for a Job

To review all accounts for a job:

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

6.2.7 Reviewing Accounts for a Line

Access the Change Request Entry form.

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

6.2.8 Reviewing General Ledger Information

Access the Work With Account Ledger form.

Figure 6–4 Work With Account Change Request Inquiry form

Account Inquiry - Work With Account Change Request Inquiry

Report Row Tools

Job Number * Birmingham Steel - Memphis

From Cost Code To Cost Code

From Cost Type To Cost Type

Supplier Ledger Type

Totals B Cost 325,475.00 Revenue 264,875.00 Subcontract 167,450.00

Records 1 - 24

Change Request	Description	Req. No.	Line Number	Cost ST	Cost LT	Cost Account	Cost Original
1	Foundation Materials		1.000	A	JA	1620.1351.02020002	10,000.00
1	Foundation Materials		2.000	M	MA	1620.1351.02020230	5,000.00
2	Foundation Labor		1.000	A	JA	1620.1341.01011100	5,000.00

Job Number

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

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

From Cost Code and To Cost Code

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

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

From Cost Type and To Cost Type

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

Note: If you use a flexible chart of accounts and the object account is set to six digits, it is recommended that you 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.

Supplier

Enter the address book number of the supplier or subcontractor.

Ledger Type

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

Revising and Approving Change Requests, PCOs, and COs

This chapter contains the following topics:

- [Section 7.1, "Understanding Change Request Revisions and Approvals"](#)
- [Section 7.2, "Working with Detail Status Codes"](#)
- [Section 7.3, "Approving Change Request Accounts, PCOs, and COs"](#)

See Also:

- [Copying Account Balances.](#)
- [Setting Up Change Request Detail Status Codes.](#)
- [Committing Subcontracts to the EnterpriseOne Subcontract Management System.](#)
- [Committing Contract Information to the EnterpriseOne Contract and Service Billing System.](#)

7.1 Understanding Change Request Revisions and Approvals

Use the JD Edwards EnterpriseOne Change Management system to track changes to change requests as the requests move through the organization's approval process. The JD Edwards EnterpriseOne Change Management system enables automatic updates to account ledgers and subcontracts. The system also calculates the best amount.

7.1.1 Mobile Enterprise Applications for Change Requests (Release 9.1 Update)

The following mobile applications are available for entering, reviewing, and approving change requests on a mobile device:

- [Change Request Entry Smartphone Application](#)
- [Change Request Entry Tablet Application](#)

These applications require system administrator configuration before they are available to individual users. Contact your system administrator to determine whether these applications are available for use.

Additionally, see the following topics in the JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide:

- [Change Request Entry Mobile Applications](#)
- [Change Request Approval Mobile Applications](#)

7.1.2 Change Requests, PCOs, and COs

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

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

7.1.3 Final Amount

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

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

7.1.4 Best Amount

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

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

The system automatically and continuously determines the best amount.

7.1.5 Integration with the EnterpriseOne Subcontract Management and EnterpriseOne Contract and Service Billing Systems

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

7.1.6 PCO and CO Approvals

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

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

7.1.7 Close Lines on the Change Request

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

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

7.1.8 Close PCOs and COs

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

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

7.1.9 Common Fields Used in This Chapter

Change Req. Header Status (change request header status)

Enter a UDC (53/ST) that indicates the status of the change request. It is for information only and is not attached to a ledger type. This code should not be confused with the status codes that are defined in the Change Request Detail Status Update table (F53101).

Cost Sts (cost status), Rev Sts (revenue status), and Sub Sts (subcontract status)

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

Revenue Status

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

Subcontract Status

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

7.2 Working with Detail Status Codes

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

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

See Also:

- [Setting Up Change Request Detail Status Codes.](#)

7.2.1 Understanding Detail Status Codes

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

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

7.2.2 Understanding Global Status Updates

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

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

You can specify the general ledger date that you want to update. The program updates the Account Ledger table (F0911) for all records with the general ledger date that you

specify. Leave the G/L field blank to use the system date. If you specify a date, change request detail lines must have the same date.

7.2.2.1 Specifying Which Accounts to Update

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

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

7.2.2.2 Update Considerations

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

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

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

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

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

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

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

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

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

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

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

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

- Updates the ledger when you click OK on the Global Status Update form if you change to a detail status code that has a ledger type associated with it.
- Changes all accounts of a type when you do not specify a detail status code in the From column.

For example, if you leave the wildcard character (*) in the From column for the Revenue Status field, the system changes all of the revenue accounts to the status that you specify in the To column for the Revenue Status field.

- Changes only accounts that are at the status specified in the From column when you enter a value in the From column.
- Changes the header status for the change request when you specify a new status in the appropriate Header Status field.

7.2.2.3 Technical Considerations

Technical considerations to consider:

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

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

7.2.2.4 Ledger Updates

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

7.2.3 Forms Used to Update Detail Status Codes

Form Name	FormID	Navigation	Usage
Change Request Entry	W5310B	Change Management Setup (G5311), Change Request Entry. On the Work With Change Requests form, enter a job number and click Find. Locate and select a job.	Update detail status codes manually.

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

7.2.4 Updating Detail Status Codes Manually

Access the Change Request Entry form.

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

7.2.5 Updating Detail Status Codes Using Global Status Update

Access the Global Status Update form.

Figure 7-1 Global Status Update form

Change Request Entry - Global Status Update

Job Number *Birmingham Steel - Memphis*

CR Number *Foundation Materials*

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

UPDATE STATUSES:	From	To
Cost Status	*	
Revenue Status	*	
Subcontract Status	*	
Change Req. Header Status	*	

G/L Date

To update detail status codes using Global Status Update:

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

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

7.2.6 Closing Detail Lines on Change Requests

Access the Change Request Entry form.

Complete the Chg Req. Detail Closed field for the detail line that you want to close. The system closes the line and the fields are not accessible.

Chg. Req. Detail Closed (change request detail closed)

Enter **1** to indicate a change request detail line, PCO, or CO is closed. Enter **0** to indicate a change request detail line, PCO, or CO is open. No further action is necessary.

7.3 Approving Change Request Accounts, PCOs, and COs

This section provides an overview of the approval process for change request accounts, PCOs, and COs, lists prerequisites, and discusses how to:

- Approve individual accounts.
- Approve multiple accounts.
- Approve PCOs.
- Approve COs.

See Also:

- [Understanding the Approval Process for Change Request Accounts, PCOs, and COs.](#)
- [Understanding Global Status Updates.](#)
- [Approving PCOs.](#)

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

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

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

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

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

7.3.1.1 Approving Accounts on Change Requests

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

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

You can approve the account on a change request by:

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

7.3.1.2 Approving Accounts from the Change Request Entry Program

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

7.3.1.3 Approving Accounts when Approving PCOs and COs

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

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

7.3.1.4 PCO Approval

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

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

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

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

7.3.1.5 CO Approval

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

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

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

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

7.3.2 Prerequisites

Before you complete the tasks in this section:

- Set the PCO Approved Status processing option so that the system recognizes which code you want to use to indicate that a PCO is approved.

If you do not set this processing option, the system does not associate which code is associated with an approval and does not prompt you to complete the information for a global status update.

- Set the CO Approved Status processing option so that the system recognizes which code that you want to use to indicate that a CO is approved.

If you do not set this processing option, the system does not recognize which code is associated with an approval and does not prompt you to complete the information for a global status update.

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

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

Form Name	FormID	Navigation	Usage
Global Status Update	W53WINE	Change Management Setup G5311), Change Request Entry On the Work With Change Requests form, enter a job number and click Find. Locate and select a job.	Approve COs.

7.3.4 Approving Individual Accounts

Access the Change Request Entry form.

7.3.5 Approving Multiple Accounts

Access the Global Status Update form.

To approve multiple accounts:

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

- Cost Status
- Revenue Status
- Subcontract Status
- Change Req. Header Status

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

G/L Date (general ledger date)

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

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

7.3.6 Approving PCOs

Access the Global Status Update form.

To approve planned change orders:

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

- Subcontract Status
- Change Req. Header Status

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

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

7.3.7 Approving COs

To approve COs:

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

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

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

Working with Subcontracts

This chapter contains the following topics:

- [Section 8.1, "Entering Subcontract Information"](#)
- [Section 8.2, "Committing Subcontracts to the EnterpriseOne Subcontract Management System"](#)
- [Section 8.3, "Modifying Subcontract Logs"](#)

8.1 Entering Subcontract Information

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

8.1.1 Understanding Subcontract Commitments

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

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

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

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

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

8.1.2 Prerequisite

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

8.1.3 Forms Used to Enter Subcontract Information

Form Name	FormID	Navigation	Usage
Subcontract Detail Search	W5343SA	Change Management Setup (G5311), Change Request Entry. On Work with Change Requests, locate a job number and click Select. On Change Request Entry select a record and then select Additional Details from the Row menu. On Cost, Revenue, Subcontract Details, select the Subcontract Details tab. Select Subcontract Mgmt., and then Subcontract Search, from the Form menu.	Enter information for subcontracts.

8.1.4 Entering Subcontract Information

Access the Subcontract Detail Search form.

To enter subcontract information:

1. On Subcontract Detail Search, click Find.
2. Select the subcontract information that you want to add to the detail line, and then click Select.

The subcontract information appears on the Subcontract Details tab.

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

- **Subcontract Bill Item Code**

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

8.2 Committing Subcontracts to the EnterpriseOne Subcontract Management System

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

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

8.2.1 Understanding the Subcontract Commitment Process

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

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

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

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

8.2.1.1 Committing in Proof and Final Mode

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

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

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

8.2.1.2 Detail Status Codes

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

committed. You can set the processing option for the status of a submitted subcontract or contract to automatically update the detail status code assigned to a committed account to the special status code.

8.2.1.3 Subcontract Amendment Report

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

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

The Subcontract Amendment Report from Change Management report includes:

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

8.2.2 Prerequisites

Before you complete the tasks in this section:

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

8.2.3 Forms Used to Commit Subcontracts from the Change Request Entry Program

Form Name	FormID	Navigation	Usage
Cost, Revenue, Subcontract Details	W5310C	<p>Change Management Setup (G5311), Change Request Entry</p> <p>On Work with Change Requests, locate a job number and click Select.</p> <p>On Change Request Entry, select a record and then select Additional Details from the Row menu.</p> <p>On Cost, Revenue, Subcontract Details, select Subcontract Mgmt., and then Subcontract Commit from the Form menu.</p> <p>Select a Report Destination and click OK on Report Output Destination.</p>	Commit subcontracts from the Change Request Entry program.
Subcontract Detail Commit	W53301B	<p>Change Management Inquiries (G5312), Subcontract Detail/Commit</p> <p>On Subcontract Detail/Commit, locate and select the accounts you want to commit.</p> <p>From the Row menu, select Subcontract Commit.</p> <p>Confirm the commitment on Subcontract Confirmation.</p>	<p>Commit subcontracts from the Subcontract Detail/Commit program.</p> <p>The system commits the subcontract to the JD Edwards EnterpriseOne Subcontract Management system. If you commit in final mode, the system changes the detail status code to the code that is specified in the processing options.</p>

8.2.4 Committing Subcontracts from the Change Request Entry Program

Access the Cost, Revenue, Subcontract Details form.

Contract

Enter the contract number used in the JD Edwards EnterpriseOne Subcontract Management system. This number, along with the contract type and contract company, provides the link between the JD Edwards EnterpriseOne Subcontract Management and JD Edwards EnterpriseOne Change Management systems. It enables you to copy buyout information for a change request into the JD Edwards EnterpriseOne Subcontract Management system.

Contract Type

Enter a UDC (00/DT) that is associated with a contract in the JD Edwards EnterpriseOne Subcontract Management system. This field, along with the contract

number and the contract company, links the change request to the JD Edwards EnterpriseOne Subcontract Management system.

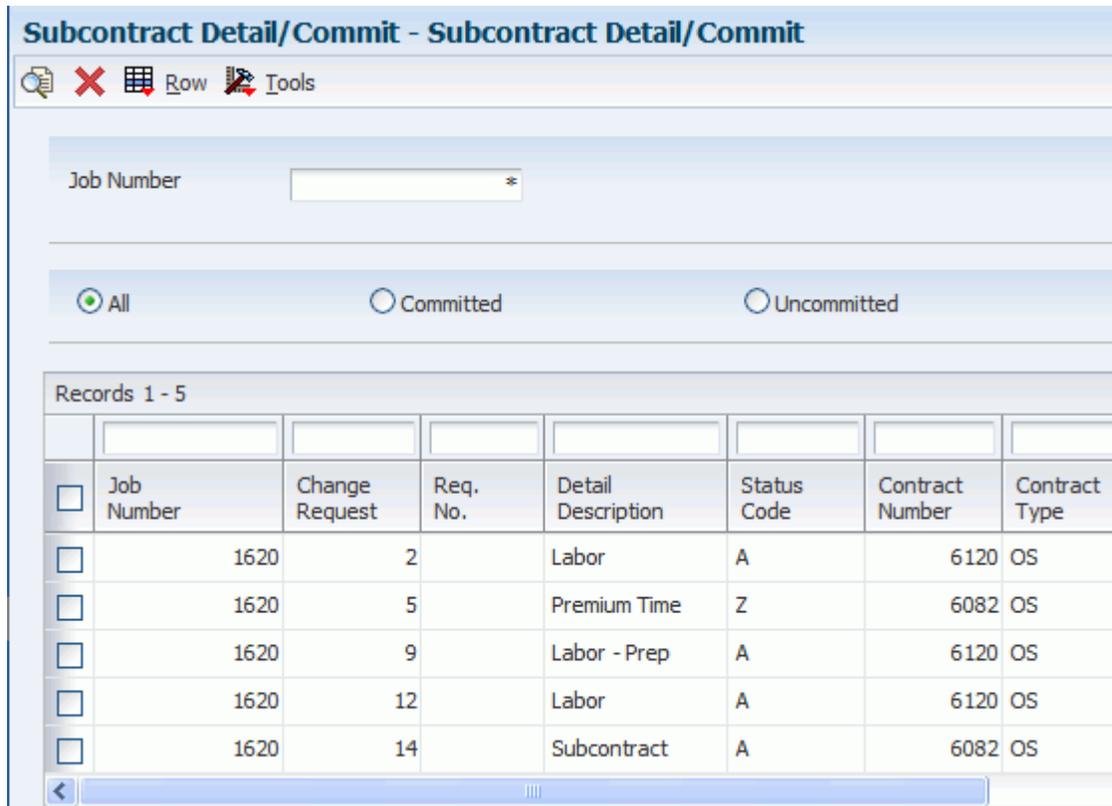
Order Co (order contract)

Enter a number that, along with contract number and contract type, uniquely identifies a subcontract.

8.2.5 Committing Subcontracts from the Subcontract Detail/Commit Program

Access the Subcontract Detail/Commit form.

Figure 8-1 Subcontract Detail/Commit form



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

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

8.2.6.1 Processing

Use these processing options to specify the commitment processing.

1. Process Mode

Specify whether the system runs the program in proof or final mode. You should first run the program in proof mode so you can view the report before running it in final mode. When you run the program in final mode, the system updates tables and generates a report. Values are:

Blank: Proof mode

1: Final mode

2. Subcontract Change Order Number Option

Specify the subcontract change order number that the system assigns to the change request. Values are:

Blank: Use the number from the existing subcontract change order.

1: Use the value that you specify in the Subcontract Change Order Number processing option.

3. Subcontract Detail Line Item

Specify how the system updates the Purchase Order Detail table (F4311) when the system commits a change request. Values are:

Blank: Create a new line item for a subcontract for the Purchase Order Detail table.

1: Update an existing line item for a subcontract for the Purchase Order Detail table. The amount committed replaces the current amount for that line item if no payments have been made.

4. G/L Account

Specify the general ledger account to be used when the system commits a change request. Values are:

Blank: Use the existing account.

1: Use the account specified in the automatic accounting instructions for Change Management.

5. Subcontract Status

Specify the detail status code that the system assigns to the change request when it is committed to JD Edwards EnterpriseOne Subcontract Management.

Verify that this status code has been set up in the Detail Status Code Update program.

5a. Audit Trail - F0911

Specify how the system creates audit trail records in the Account Ledger table (F0911).

Note: If subcontract status has changed, select an option for audit trail records.

Values are:

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

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

2: Do not create.

6. Terms Only Line Type

Specify a code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces, such as JD Edwards EnterpriseOne General Accounting, JD Edwards EnterpriseOne Job Cost, JD Edwards EnterpriseOne Accounts Payable, JD Edwards EnterpriseOne Accounts Receivable, and JD Edwards EnterpriseOne Inventory Management. It also specifies the conditions under which a line prints on reports, and it is included in calculations. For a list of values, click the visual assist button next to the field.

8.2.6.2 Log Revisions

Use these processing options to specify commitment processing when creating Contract Log Revisions.

1. Log Type

Specify the log type that the system assigns when you create Contract Log Revisions. For a list of values, click the visual assist button next to the field.

2. Pay Effect

Specify the pay effect flag that the system assigns when you create Contract Log Revisions.

8.2.6.3 Versions

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

1. Subcontract/PO Entry (P4310)

Specify the version that the system uses when it commits a change request. The commitment process uses server XT4311Z1, which uses the version that you select for Purchase Orders (P4310).

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

2. Log Master (P4305)

Specify the version for the Logs Entry (P4305) program.

8.3 Modifying Subcontract Logs

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

8.3.1 Understanding Subcontract Logs

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

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

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

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

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

- Submittals. A submittal is information that you need to receive from a subcontractor, such as proof of insurance.

- Transmittals. A transmittal is information that you need to send to a subcontractor, such as permission to proceed.

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

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

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

8.3.2 Forms Used to Modify Subcontract Logs for a Change Request

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

8.3.3 Modifying a Subcontract Log for a Change Request

Access the Change Management Log Details form.

Job Number

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

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

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

Change Request

Enter the number assigned to the change request for a particular job.

Log Type

Enter a UDC (00/LG) that specifies the type of information in a log entry. The log type is used to group similar types of entries. This field is optional.

Log Status

Enter a code that specifies whether the requirements for the log line have been satisfied. Values are:

Blank: The requirements have not been satisfied, the log line is not active, or no status is required.

Y: Yes.

N: No.

This field is optional.

Required Date

Enter the date that the log entry needs to be received. For example, consider a submittal requirement for an insurance certificate. The date that a copy of the policy or certified proof of coverage document is to be received would be entered in the Required Date field. This field is optional.

Pay Effect

Enter a code that indicates whether the submittal requirement is of such importance that regular payments to the subcontractor can be suspended if the submittal requirement is not properly satisfied. This code is normally used in conjunction with submittal log entries. Values are:

Y: Issue warning messages if log requirements are not met.

N: Do not issue warning messages.

If Pay Effect is set to Y, various warning messages can appear during progress payment entry when outstanding log requirements exist. This field is optional.

Issue Date

Enter the date that the log entry was issued. For example, the effective date for an insurance policy is entered in the Issue Date field. This field is optional.

Expired Date

Enter the expiration date of the log entry. For example, in the case of a submittal requirement for an insurance certificate, the termination date for the policy would be entered in the Expired Date field. The termination date would then be used by the Submittal Status Update program to update the status field. If the Expired Date is earlier than the date that you run the program, the system sets the status to N for the log entry. This field is optional.

Contract Number

Enter a number that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on. This field is optional.

Contract Type

Enter a UDC (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. The JD Edwards EnterpriseOne systems have reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)

These document types are defined by the system and should not be changed:

P: Accounts Payable

R: Accounts Receivable

T: Payroll

I: Inventory

O: Purchase Order Processing

J: General Accounting/Joint Interest Billing

S: Sales Order Processing documents

This field is optional.

Company

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

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

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

Supplier Number

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

Category Code 1

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

See Also:

- "Working with Subcontract Logs" in the *JD Edwards EnterpriseOne Applications Subcontract Management Implementation Guide*.

Working with Contract Commitments

This chapter contains the following topics:

- [Section 9.1, "Understanding Contract Commitments"](#)
- [Section 9.2, "Entering Revenue Information for Contracts"](#)
- [Section 9.3, "Committing Contract Information to the EnterpriseOne Contract and Service Billing System"](#)

9.1 Understanding Contract Commitments

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

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

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

9.2 Entering Revenue Information for Contracts

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

9.2.1 Understanding Revenue Information for Contracts

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

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

9.2.2 Forms Used to Enter Revenue Information for Contracts

Form Name	FormID	Navigation	Usage
Cost, Revenue, Subcontract Details	W5310C	Change Management Setup (G5311), Change Request Entry On Work With Change Requests, enter a job number and click Find. Locate and select a job. On Change Request Entry, select a detail line, and then select Additional Details from the Row menu.	Enter revenue information for contracts.
Contract Search	W5201SA	On Cost, Revenue, Subcontract Details, click the Revenue Details tab. Select Contract Billing and then Billing Search from the Form menu. On Contract Search, click Find. Select the contract information that you want to add to the detail line, and then click Select. The contract information appears on the Revenue Details tab. Complete the Rev Bill Item field and click OK. The revenue details appear in the detail line.	Enter revenue information for contracts.

9.2.3 Entering Revenue Information for Contracts

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

Rev Bill Item

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

9.3 Committing Contract Information to the EnterpriseOne Contract and Service Billing System

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

- Commit contracts from the Change Request Entry program (P5310).

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

9.3.1 Understanding the Contract Commitment Process

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

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

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

9.3.1.1 Committing in Proof and Final Mode

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

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

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

9.3.1.2 Detail Status Codes

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

9.3.1.3 Contract Amendment Report

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

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

The Contract Amendment Report from Change Management report includes:

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

9.3.2 Prerequisite

Set up contracts in the JD Edwards EnterpriseOne Contract and Service Billing system. Contracts must have a base contract change order record.

9.3.3 Forms Used to Commit Contracts

Form Name	FormID	Navigation	Usage
Cost, Revenue, Subcontract Details	W5310C	Change Management Setup (G5311), Change Request Entry On Work With Change Requests, locate a job number and click Select. On the Change Request Entry form, select a detail line that you want to commit and then select Additional Details from the Row menu.	Commit contracts from the Change Request Entry program.

Form Name	FormID	Navigation	Usage
Work With Revenue Details/Commit	W53311A	Change Management Inquiries (G5312), Revenue Detail On Work With Revenue Details/Commit, locate and select the records you want to commit, and select Commit Billing from the Row menu. On Contract Confirmation, click OK to commit the account.	Commit contracts from the Revenue Detail program. The system commits the contract to the Contract Billing system. If you commit in final mode, the system changes the detail status code to the code specified in the processing options.

9.3.4 Committing Contracts from the Change Request Entry Program (P5310)

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

Contract

Enter the contract number used in the JD Edwards EnterpriseOne Contract and Service Billing system. This number, along with the contract type and contract company, provides the link between the JD Edwards EnterpriseOne Contract and Service Billing and JD Edwards EnterpriseOne Change Management systems. It will enable you to copy revenue information for a change request into the JD Edwards EnterpriseOne Contract and Service Billing system.

Billing Line

Enter the pay item number as defined by the owner. This field is alphanumeric and can be up to 15 characters in length. It is recommended that you use numeric information for this pay item number.

Billing Line Description

Enter additional text that further describes or clarifies an element.

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

Access the Contract Confirmation form.

9.3.6 Setting Processing Options for Change Request Revenue Details (P53311)

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

9.3.6.1 Default

1. Process Mode

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

0: Proof mode.

1: Final mode.

2. Status Code Revenue

Specify the detail status code that the system assigns to a contract account in a detail line when you commit the line item to the JD Edwards EnterpriseOne Contract and Service Billing system. Confirm that the status code has been set up in the Change Request Detail Status Code Update program (P53101). Values are:

A: Approved

B: Best

M: Memo

P: Pending

Q: Quoted

See Also:

- "Setting Up Table Information", "Setting Up AAIs for Billing", and "Understanding Base Rules" in the *JD Edwards EnterpriseOne Applications Contract and Service Billing Implementation Guide*.

JD Edwards EnterpriseOne Change Management Reports

This appendix contains the following topics:

- [Section A.1, "Change Management Reports"](#)
- [Section A.2, "JD Edwards EnterpriseOne Change Management Reports: A to Z"](#)
- [Section A.3, "JD Edwards EnterpriseOne Selected Change Management Reports"](#)

A.1 Change Management Reports

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

Use JD Edwards EnterpriseOne Change Management reports to review these types of information.

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

A.2 JD Edwards EnterpriseOne Change Management Reports: A to Z

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

Report ID and Report Name	Description	Navigation
R53702 PCO/CR (F5314/F5311) Integrity	Print this report to compare final and quoted amounts for cost, revenue, and subcontract records in the Planned Change Order Master Table (F5314) to the attached change requests in the Change Request Detail Table (F5311).	Change Management Reports (G5313), PCO/CR (F5314/F5311) Integrity

Report ID and Report Name	Description	Navigation
R53701 CO/PCO (F5315/F5314) Integrity	Print this report to compare final and quoted amounts for cost, revenue, and subcontract records in the Change Order Master Table (F5315) to the attached planned change orders in the Planned Change Order Master Table (F5314).	Change Management Reports (G5313), CO/PCO (F5315/F5314) Integrity
R43300 Log Report/Update	Print this report to view each log entry and any extended comments for the specified job.	Change Management Reports (G5313), Log Report/Update
R53220P Account Inquiry	Print this report for information from the Change Request Account Inquiry program (P53220).	Change Management Reports (G5313), Account Inquiry
R534011 Change Request Summary	Print this report for a summary of the change request.	Change Management Reports, (G5313), Change Request Summary
R534021 Change Request Details with Contracts	Print this report for detail line information about change requests or quotes.	Change Management Reports (G5313), Change Request Details with Contracts
R53404 Job PCO Summary	Print this report for summary information about totals on the PCOs for a job.	Change Management Reports (G5313), Job PCO Summary
R534041 Job PCO Detail	Print this report for detailed information about PCOs.	Change Management Reports (G5313), Job PCO Detail
R53405 Job CO Summary	Print this report for summary information about the PCOs that are attached to the CO and the change requests that are attached to the PCOs.	Change Management Reports (G5313), Job CO Summary
R534051 Job CO Detail	Print this report for detailed information about change requests:	Change Management Reports (G5313), Job CO Detail
R53411 Change Request Details by Account	Print this report for detail line information about change requests or quotes.	Change Management Reports (G5313), Change Request Details
R53440 Job Planned Change Orders	Print this report for information about totals on the PCOs for a job	Change Management Reports (G5313), Job Planned Change Orders
R53450 Job Change Orders	Print this report for information about the change orders for a job:	Change Management Reports (G5313), Job Change Orders

A.3 JD Edwards EnterpriseOne Selected Change Management Reports

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

A.3.1 R53702 - PCO/CR (F5314/F5311) Integrity

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

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

A.3.2 R53701 - CO/PCO (F5315/F5314) Integrity

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

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

A.3.3 R43300 - Log Report/Update

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

Each log includes:

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

A.3.4 Setting Processing Options for Log Report/Update (R43300)

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

A.3.4.1 Print Options

Change Log Status

Specify whether you want the system to change unsatisfied, expired logs that have a Pay Effect of Y to a Status of N. Values are:

1: Change unsatisfied, expired logs that have a Pay Effect of Y to a Status of N.

Blank: Do not update the status of the logs.

Print Contract Management Report

Specify whether the system prints a contract management report. If left blank, no report will print. Values are:

1: Print.

Blank: Do not print.

Print Associated Log Text

Specify whether the system prints associated log text. Values are:

1: Print.

Blank: Do not print.

A.3.5 R53220P - Account Inquiry

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

A.3.6 Setting Processing Options for Account Inquiry (R53220P)

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

A.3.6.1 Process

1. Default Cost Code Range

- From Cost Code

Specify the beginning cost code (subsidiary) account in a range of accounts. Leave this range blank to include all accounts.

- To Cost Code

Specify the ending cost code (subsidiary) account in a range of accounts. Leave this range blank to include all accounts.

2. Default Cost Type Range

- From Cost Type

Specify the beginning cost type (object) account in a range of accounts.

- To Cost Type

Specify the ending cost type (object) account in a range of accounts.

3. Supplier and 4. Ledger Type

Specify the supplier or ledger type that the system uses when printing records for the report. If this processing option is left blank, all suppliers or all ledger types are printed.

A.3.7 R534011 - Change Request Summary

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

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

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

A.3.8 Setting Processing Options for Change Request Summary (R534011)

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

A.3.8.1 Defaults

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

1. Cost Total, 2. Revenue Total, and 3. Subcontract Total

Specify how the system calculates the cost total, the revenue total, or the subcontract total. Values are:

Blank: Best amounts

1: Original amounts

2: Quoted amounts

3: Final amounts

A.3.9 R534021 - Change Request Details with Contracts

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

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

A.3.10 R53404 - Job PCO Summary

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

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

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

A.3.11 R534041 - Job PCO Detail

The Job PCO Detail Report contains information about PCOs:

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

A.3.12 R53405 - Job CO Summary

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

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

A.3.13 R534051 - Job CO Detail

The Job CO Detail Report includes information about change requests:

- Job number and description
- Information about the CO, including:
 - CO number and description
 - Status
 - Submitted and approved dates
 - Total of authorized amounts for cost, revenue, and subcontract accounts

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

A.3.14 R53411 - Change Request Details by Account

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

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

A.3.15 R53440 - Job Planned Change Orders

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

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

A.3.16 R53450 - Job Change Orders

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

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

Glossary

Approved Date

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

Contract Number

Enter a number that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on. This field is optional.

Contract Type

Enter a user-defined code (UDC) (00/DT) that is associated with a contract in the JD Edwards EnterpriseOne Subcontract Management system. This field, along with the contract number and the contract company, links the change request to the JD Edwards EnterpriseOne Subcontract Management system.

Cost Final

Enter the final amount for a detail item for a request for a cost change.

Cost Original

Enter the original amount for a cost change request detail item.

Cost Quoted

Enter the quoted amount for a detail item for a request for a cost change.

Cost Sts (cost status)

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

From Cost Code

Enter the beginning cost code (subsidiary) account in a range of accounts. Leave this range blank to include all accounts.

Job Number

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

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

Requested By

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

Rev Sts (revenue status)

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

Revenue Final

Enter the final revenue amount for a line item in the change request.

Revenue Original

Enter the original amount for a revenue change request detail item.

Revenue Quoted

Enter the quoted revenue amount for a line item in the change request.

Status

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

Status Code

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

Status Revenue

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

Sub Sts (subcontract status)

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

Subcontract Final

Enter the final subcontract amount for a line item in the change request.

Subcontract Original

Enter the original amount for a subcontract change request detail item.

Subcontract Quoted

Enter the quoted subcontract amount for a line item in the change request.

Submitted Date

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

To Cost Code

Enter the ending cost code (subsidiary) account in a range of accounts. Leave this range blank to include all accounts.

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