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B Import Mass Data into Equipment Plant Maintenance

Index

Preface

Welcome to the JD Edwards World Equipment/Plant Maintenance Guide.

Audience

This document is intended for implementers and end users of JD Edwards World Equipment/Plant Maintenance system.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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Related Documents

You can access related documents from the JD Edwards World Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1362397.1, or by using this link:

<https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1362397.1>

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Overview to Equipment/Plant Maintenance

This chapter contains these topics:

- [Section 1.1, "System Integration"](#)
- [Section 1.2, "Equipment/Plant Maintenance Features"](#)
- [Section 1.3, "Equipment/Plant Maintenance Process Flow"](#)
- [Section 1.4, "Equipment/Plant Maintenance Tables"](#)
- [Section 1.5, "Equipment/Plant Maintenance Menu Overview"](#)

You can use the maintenance features of the Equipment/Plant Management system to manage all aspects of equipment and machinery maintenance in your organization, such as:

- Planning
- Scheduling resources
- Purchasing parts and materials
- Tracking the status of preventive and corrective tasks

1.1 System Integration

From Equipment/Plant Management, you can link to other JD Edwards World systems that your organization uses. For example, use the General Accounting system to record maintenance charges against work orders. Use the Work Order Processing system to track and monitor schedules by work order. Other systems that you can link to include:

- Job Cost
- Inventory Management
- Procurement
- Shop Floor Control
- Accounts Payable

Because JD Edwards World systems are integrated, you need to enter the vital information about a piece of equipment only one time. When you create equipment masters and supplemental information for a piece of equipment, the system stores the information in the Equipment Master table (F1201). Each JD Edwards World system that you use can then access the information.

System integration also helps ensure that equipment information is consistent throughout your organization. This saves considerable time and money, especially when you need to update or revise equipment information.

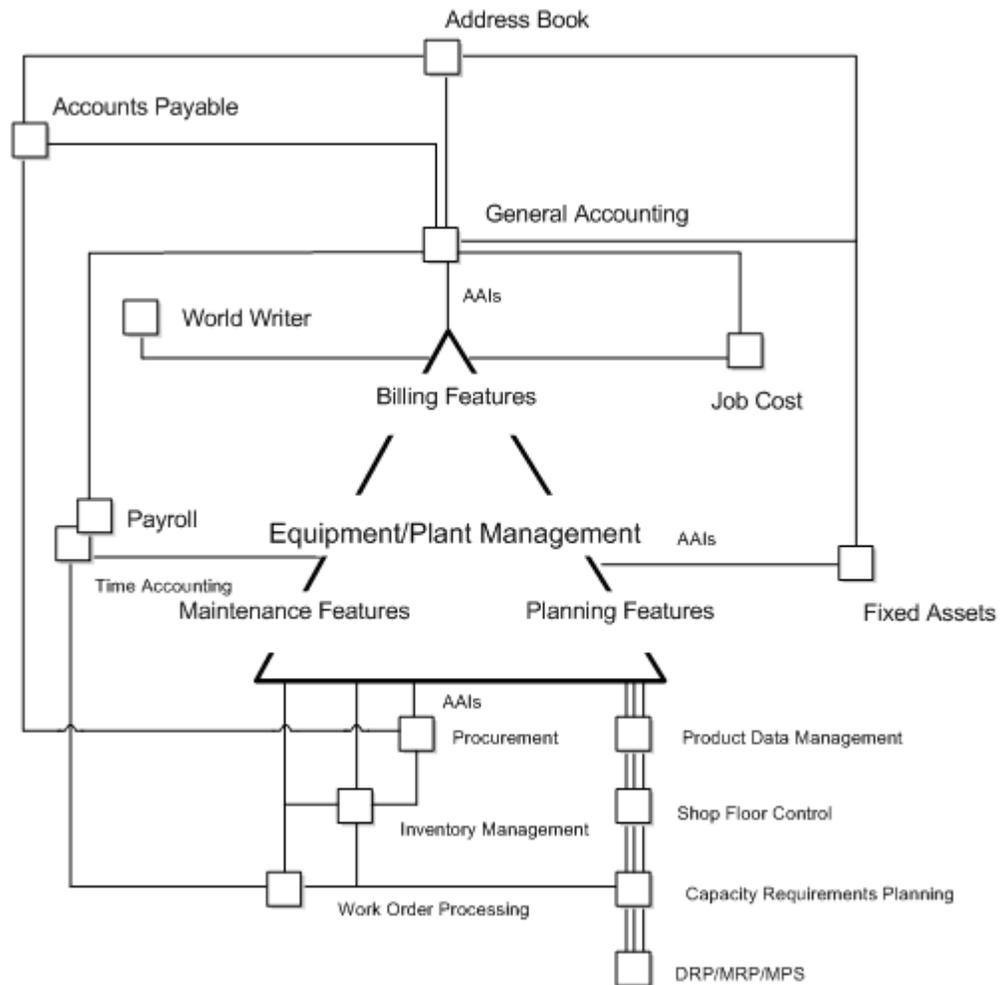
This guide describes features and functions that depend on the installation of the complete Equipment/Plant Management system. This system includes the following systems:

- 05 - Time Accounting (Stand alone Payroll module)
- 30 - Product Data Management
- 31 - Shop Floor Control
- 33 - Resource and Capacity Planning
- 34 - Material Planning
- 40 - Inventory Base and Order Processing
- 41 - Inventory Management
- 43 - Procurement

Your company might not have purchased all of these systems. Check with your system administrator to verify which systems have been purchased and installed.

The following diagram illustrates the system integration among the Equipment/Plant Management system and other JD Edwards World systems. The accompanying table briefly describes how you use each system within the context of Equipment/Plant Management.

Figure 1-1 Equipment/Plant Management System



the system integration among the Equipment/Plant Management system and other JD Edwards World systems.

The following table briefly describes how other JD Edwards World systems are used within the context of Equipment/Plant Management:

System	Description
Address Book	Every JD Edwards World system works with the Address Book system to retrieve up-to-date employee, supplier, and other applicable name and address information.
General Accounting	When you enter equipment transactions (including billing transactions), you must process them through the general ledger. You enter all statistical values, such as miles, gallons, and so on, into the general ledger. When you charge a job for equipment use, the system searches the Account Master for the appropriate rate and account to bill.

System	Description
Accounts Payable	<p>You can enter equipment charges through the Accounts Payable system.</p> <p>When you process equipment parts orders through the Procurement system, the system automatically enters the equipment number from the purchase order to the accounts payable voucher.</p>
World Writer	<p>You use World Writer to create user defined reports, such as additional location tracking and parent and component history reports.</p>
Job Cost	<p>When you charge a job for equipment use, the system searches the Job Cost Master for billing rate default values.</p> <p>When you track equipment location, the job defined in the Job Cost system is often the tracking location.</p>
Payroll and Time Accounting	<p>You can use Payroll and Time Accounting to:</p> <ul style="list-style-type: none"> ■ Enter equipment time for billing purposes. ■ Charge for labor associated with operating or repairing equipment. ■ Charge labor to a work order and a specific labor routing step.
Fixed Assets	<p>The Fixed Assets system shares many tables with Equipment/Plant Maintenance, such as the:</p> <ul style="list-style-type: none"> ■ Item Master table (F1201) - Stores equipment master information ■ Item Balances table (F1202) - Stores equipment account balance information <p>Equipment/Plant Maintenance also uses automatic accounting instructions from the Fixed Assets system.</p> <p>You can access JD Edwards World Spreadsheet Tool for Asset Reporting (STAR) through the Fixed Assets system. Use this report writer to create custom reports of equipment balances and units.</p>
Work Orders	<p>Use the Work Orders system to track, schedule, and report on preventive and corrective equipment maintenance activities.</p> <p>You can attach parts lists and detailed instructions (routings) to the work order to assist in planning labor and parts requirements.</p>
Inventory Management	<p>Use the Inventory Management system to:</p> <ul style="list-style-type: none"> ■ Track and take inventory of repair parts ■ Attach parts lists to work orders
Procurement:	<p>You can create purchase orders directly from the work order parts list and from other maintenance planning functions within Equipment/Plant Maintenance.</p> <p>A purchase order includes the equipment number, which the system automatically enters in related forms and tables, such as:</p> <ul style="list-style-type: none"> ■ Accounts payable entry ■ General ledger ■ Equipment ledger

System	Description
Manufacturing Systems	<p>You can use several programs within JD Edwards World manufacturing systems to plan maintenance parts and labor needs. Use these programs to:</p> <ul style="list-style-type: none"> Set up the Master Planning Schedule to indicate that machines scheduled for maintenance are not available for use during that time. Project labor and parts needed for maintenance. Generate messages to indicate that parts need to be purchased and resources allocated to perform the needed maintenance.

1.2 Equipment/Plant Maintenance Features

The maintenance features of the JD Edwards World Equipment/Plant Management system are designed to meet equipment maintenance needs in a variety of ways. For example, you can use the system to:

- Enter and search for equipment information.
- Track equipment movement and status, and assign equipment to multiple locations.
- Track the maintenance history of each piece of equipment and target potential problem machines to minimize equipment downtime.
- Coordinate maintenance activities based on preventive and corrective maintenance schedules.
- Coordinate maintenance activities with materials and labor resources.
- Maintain detailed cost accounting records for equipment.
- Produce reports on a wide range of equipment-related topics.

1.2.1 Equipment Information and Search

You can use Equipment/Plant Maintenance to locate, organize, and track the availability and repair status of equipment using the following types of information:

Information	Description
Parent and component relationships	<p>A parent is an item or piece of equipment that consists of other parts or components. It can also be a child or component of another piece of equipment.</p> <p>A parent does not have to represent an actual piece of equipment. You can set up virtual or logical pieces of equipment and establish child relationships with the logical equipment. For example, a manufacturing line could be a parent and the associated manufacturing machinery would be children or components of the manufacturing line.</p> <p>Use parent and component relationships to group individual components in the system. You can track the history of a piece of equipment's immediate parent or any of its components. The system accommodates up to 25 levels of components. This is useful if you use complex or interchangeable equipment assemblies.</p>

Information	Description
Equipment numbers	You can identify equipment by any or all of the following: <ul style="list-style-type: none"> ■ Unit number ■ Item number ■ Serial number
Supplemental data	You can define unlimited types of supplemental data, which you can then assign to any piece of equipment. For example, you might want to track oil consumption, oil analysis, and so on.
Location	You can search for and track equipment based on its historical, current, or planned location. This is helpful if you need to review equipment that is used at a particular job site or reroute equipment between job sites.
Category codes	You can define up to 23 category codes to classify equipment for reporting and data selection purposes. For example, you can perform online searches for equipment based on category codes that represent major accounting class, major equipment class, manufacturer, model year, and so on.
Other user defined codes	You can assign three additional user defined codes: <ul style="list-style-type: none"> ■ Finance methods ■ Equipment status codes ■ Equipment message types For example, you can set up equipment status codes to apply to each piece of equipment, such as: <ul style="list-style-type: none"> ■ Down ■ Standby ■ Working ■ Available
Licenses and certifications	You can record and track license and permit information for each piece of equipment. This is helpful if you dispatch equipment to job sites located in different licensing authorities.
Online message logs	You can use online message logs to enter messages about a piece of equipment. Standard message types include: <ul style="list-style-type: none"> ■ Planned maintenance ■ Actual maintenance ■ Problem reports You can also enter additional remarks about any piece of equipment.

1.2.2 Equipment Location Tracking

You can locate and report on the availability and working status of equipment. You can also:

- Revise location tracking information.
- Transfer one or more pieces of equipment.
- Consolidate equipment from multiple locations.

1.2.3 Detailed Equipment Cost Accounting

Equipment/Plant Maintenance provides you with the following cost accounting features:

Feature	Description
Custom chart of accounts	You define the chart of accounts for your equipment cost and revenue to meet your unique needs, such as matching a parent company's accounting structure. At any time, you can view these accounts at a summarized or detailed level.
Unit cost analysis	You can analyze costs according to the operating hours or miles logged for equipment in payroll, and equipment time entry records or meter reading entries.
Operating and maintenance cost analysis	Equipment/Plant Maintenance provides you with various reports on operating and maintenance costs. You can review maintenance costs per mile or per hour or on a monthly, yearly, or acquisition-to-date basis.

1.2.4 Reporting

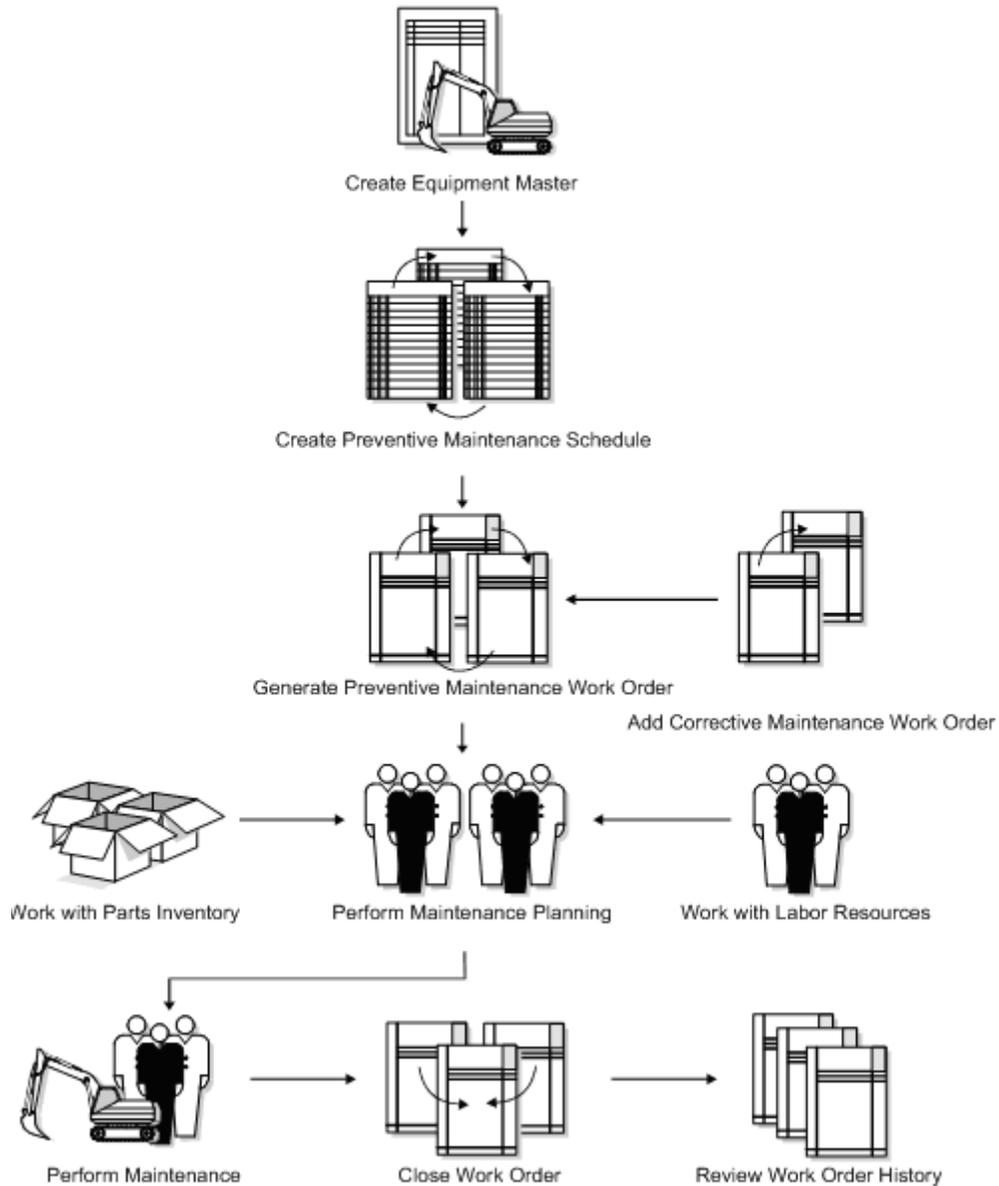
Equipment/Plant Maintenance provides you with several powerful reporting tools, which offer you a comprehensive view of your equipment needs and processes. These reporting tools include:

Tool	Description
Standard reports	You can tailor predefined DREAM Writer reports to fit your company's needs and simplify the fulfillment of various IRS reporting requirements. Equipment/Plant Maintenance includes reports, such as: <ul style="list-style-type: none"> ■ Maintenance Log ■ Maintenance Schedule ■ Location Tracking ■ Work Order Status ■ Work Order Cost Summary ■ Work Order Cost Detail ■ Equipment Cost Analysis
STAR	You can design your own equipment reports with STAR. STAR guides you through the setup of custom reports that specifically access the system's equipment and fixed asset files.
World Writer	For reporting needs not addressed by standard reports or STAR, you can use JD Edwards World Writer to design and build custom reports, providing unlimited user defined access to your database.

1.3 Equipment/Plant Maintenance Process Flow

The following graphic illustrates the flow of the primary events and processes within Equipment/Plant Maintenance:

Figure 1-2 Equipment/Plant Maintenance Process Flow



1.4 Equipment/Plant Maintenance Tables

The following information describes the primary and secondary tables within the Equipment/Plant Maintenance system.

1.4.1 Primary Tables and Descriptions

Table	Description
Equipment Master (F1201)	Stores basic information about each piece of equipment, such as: <ul style="list-style-type: none"> ■ Equipment number ■ Description ■ Account coding ■ Category codes
Item Balances (F1202)	Stores the account balance amount or unit for each equipment account.
Location Tracking (F1204)	Stores location information for an equipment item, including: <ul style="list-style-type: none"> ■ Equipment number ■ Location ■ Start effective date ■ Ending date ■ Equipment status ■ Transfer number ■ Location code, which indicates the type of location, such as planned, current, or history
Maintenance Schedule (F1207)	Stores information about each occurrence for a type of service, such as: <ul style="list-style-type: none"> ■ When the service is to be performed ■ When the service was last completed ■ Current status ■ References to any associated work order
Work Order Master (F4801)	Stores static information about each work order, such as: <ul style="list-style-type: none"> ■ Description of work ■ Budgeted amount and hours ■ Equipment worked on ■ Charging information
Account Ledger (F0911)	Stores General Ledger journal entry audit trails for both the Item Balances table (F1202) and the Account Balances table (F0902).

1.4.2 Secondary Tables and Descriptions

Table	Description
Supplemental Data (F12090, F12092, and F12093)	Stores additional information about equipment in either columnar or narrative format.
Supplemental Data Cross Reference (F1392)	Stores valid supplemental data types for classes of equipment that are defined by category codes.
Specification Data Table (F1216)	Stores static equipment information, such as power requirements, size, capacity, and other nameplate information.
Item Messages Log (F1205)	Stores messages regarding equipment maintenance.

Table	Description
License Master (F1206)	Stores license and permit information for equipment.
Model Maintenance Schedule (F12071)	Stores model maintenance schedules.
Location History Text (F1210)	Contains text for location history records.
Parent History (F1212)	Contains the history of parents for a component.
Specification Cross Reference Table (F1215)	Stores the valid values for each field in the Specification Data Table by class of equipment.
Meter Reading Estimates (F1306)	Maintains estimated meter readings.
Status History (F1307)	Maintains a history of status changes to equipment and work orders.
Maintenance Loops (F1308)	Stores equipment maintenance information by associated equipment and service type.
Equipment Category Code Mapping (F1391)	Maintains the rules by which the system automatically assigns equipment and business unit category codes when you create master records for new equipment or create work orders for equipment.
Maintenance Rules (F1393)	Defines when preventive maintenance will be scheduled and provides default values to work orders.
PM Projections (F13411)	Maintains information about projected PMs by service type for each piece of equipment.
Work Order Record Types (F48002)	Stores text associated with work orders.
Work Order Parts (F3111)	Maintains information about parts related to specific work orders.
Work Order Routing (F3112)	Maintains information about the labor steps related to specific work orders.
Work Order Instructions (F4802)	Stores description text and the various record types that are defined in the user defined codes, such as Description of Request and Final Disposition.
Work Order Status Action (F4826)	Maintains information about the order of allowed statuses through which a work order must pass.
Work Order Approval Routing (F4827)	Maintains information about work order approvers.
Work Order Approval (F4828)	Stores audit information for work order approvals.
Bill of Material Master (F3002)	Stores information about the parts needed to perform a specific type of maintenance.
Routing Master (F3003)	Stores detailed instructions by labor step for a specific type of maintenance.
Forecast (F3460)	Stores the forecast data that the Material Requirements Planning (MRP) program uses for calculations.
Default Accounting Constants (F12002)	Maintains default account information by company and asset cost account.
Default Depreciation Constants (F12003)	Maintains default information by company and asset cost account of all depreciation books and values.
User Defined Codes (F0005)	Contains all user defined system values.

Table	Description
Address Book Master (F0101)	Contains tax assessor and equipment user address information.
Account Master (F0901)	Maintains general ledger account data.
Automatic Accounting Instructions Master (F0012)	Contains information used to define the interfaces between Equipment/Plant Maintenance and the General Accounting chart of accounts.

1.5 Equipment/Plant Maintenance Menu Overview

JD Edwards World systems are menu driven. System functions are organized according to their frequency of use. Access Equipment/Plant Maintenance menus from the Equipment/Plant Management menu (G13).

Figure 1-3 Equipment/Plant Maintenance Menu Overview

Menu Overview - Equipment/Plant Maintenance
Equipment/Plant Management G13



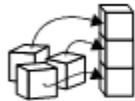
Daily Processes

- * Equipment Information G1311
 - * Supplemental Data G1318
- * Cost Inquiries and Reports G1312
- * Equipment Location Tracking G1314
- * Equipment/Plant Maintenance G1315
- * Equipment Work Orders G1316
 - * Work Order Processing G1317



Periodic Processes

- * Maintenance Planning G1322
- * Material Planning G1323
- * Labor Planning G1324



Setup Processes

- * Equipment/Plant Management Setup G1341
- * User Defined Codes G1342
- * Supplemental Data G1344
- * Preventive Maintenance G1345
- * Work Order Setup G4841
- * Planning Setup G1346



Advanced and Technical Processes

- * Global Updates G1331
 - * Fixed Assets Global Updates G1231
 - * Work Order Purge G3131

Part I

Equipment Information

This part contains these chapters:

- Chapter 2, "Overview to Equipment Identification"
- Chapter 3, "Create an Equipment Master"
- Chapter 4, "Enter Additional Detailed Information"
- Chapter 5, "Search for Equipment Information"
- Chapter 6, "Work with Message Logs"
- Chapter 7, "Review Parent and Component Information"
- Chapter 8, "Equipment Information Tracking"
- Chapter 9, "Track Equipment Location"
- Chapter 10, "Review Maintenance Costs"
- Chapter 11, "Process G/L to Equipment"
- Chapter 12, "Work with G/L Journal Entries"
- Chapter 13, "Post G/L Journal Entries to Equipment"

Overview to Equipment Identification

This chapter contains the following topics:

- [Section 2.1, "Objectives"](#)
- [Section 2.2, "About Equipment Identification"](#)

2.1 Objectives

- To create equipment master information
- To create supplemental equipment information
- To locate equipment information
- To access other programs from an equipment identification program
- To review parent and component relationships and history online

2.2 About Equipment Identification

You must identify every piece of your equipment in the system before you can use Equipment/Plant Maintenance. After you create the necessary equipment identification information, you can:

- Account for equipment in quantities
- Search for equipment status, location, and activity online
- Track historical, current, and planned physical locations for a piece of equipment
- Keep detailed maintenance and project logs
- View assembly components individually or in groups

Identifying equipment consists of the following tasks:

- Creating an equipment master
- Entering additional detailed information
- Searching for equipment information
- Working with message logs
- Reviewing parent and component information

2.2.1 How Does the System Use Equipment Identification?

Equipment identification is the foundation of several JD Edwards World systems, in addition to Equipment/Plant Maintenance. When you identify equipment, consider the following issues:

- Type of information required
- Category codes and equipment identification
- Equipment identification numbers
- Parent and component relationships

2.2.2 Types of Equipment Identification Information

Equipment identification consists of four types of information:

- Equipment master
- Supplemental data
- Specification data
- Message logs

You must create an equipment master for every piece of equipment to use the system's management features, such as scheduling equipment for preventive maintenance and tracking maintenance costs. You can also include supplemental data and message logs to further define equipment in the system.

Equipment Master

The equipment master is a repository of the standard information related to a specific piece of equipment. You must create an equipment master for every piece of equipment to manage equipment inventory, costs, warranties, billing, preventive maintenance, and so on.

In Equipment/Plant Maintenance, you use the equipment master to:

- Set up equipment for maintenance processing
- Set up parent/component relationships and track components as both equipment and inventory
- Link parts inventory to specific equipment

For example, you can set up preventive maintenance (PM) schedules for a large ventilation fan. You can identify a motor from inventory as one of the components of a fan. You can set up PMs for the motor as well, and attach parts lists to both the motor and the fan.

Supplemental Data

You can use supplemental data to record information that is important to your organization but is not included on the equipment master. Supplemental data is entirely user defined. You can use columnar and text formats to enter supplemental data. You can also establish security for supplemental data by user identification.

Specification Data

You can use specification data to record and track static information not included on the equipment master. For example, you might record nameplate data.

Message Logs

In addition to supplemental data, you can indicate the status and condition of a piece of equipment using the free-form remark capability of message logs. You can associate message logs with equipment to record operator notes or maintenance problems for equipment. You can also attach tickler dates to maintenance due messages so that they will appear at specified dates or intervals based on units, such as miles or hours.

Depending on the type of information that you want to maintain, you can use equipment messages to meet any of your information needs. Use equipment messages to:

- Note special procedures for scheduled or preventive maintenance tasks
- Report on actual maintenance
- Log problems or complaints about a specific piece of equipment

2.2.3 Category Codes and Equipment Identification

Set up category codes to further classify equipment for tracking, reporting, and data selection throughout the system. You can define up to 23 category codes to meet your organization's information needs. Use these category codes in the equipment master to describe equipment and group similar types of equipment.

If you use Equipment/Plant Maintenance with the JD Edwards World Fixed Assets system, the two systems access the same category code tables. The system displays the first 5 or first 10 category codes on the Equipment Search screen. Typically, Equipment/Plant Maintenance users access this screen more frequently than Fixed Asset users. In addition, Equipment/Plant Maintenance users frequently use the first 10 category codes as selection criteria for several tasks, such as selecting equipment for updating meter readings, selecting equipment for updating PM schedules, and so on. You should reserve as many of the first 10 category codes in the equipment master as you need for equipment maintenance purposes.

2.2.4 Equipment Identification Numbers

You can use up to three numbers to identify equipment throughout your system:

- Item number
- Unit number
- Serial number

Every equipment master in your system must include an item number. You can also enter unit and serial numbers. You must define which of these numbers is used as the primary number for identifying equipment in your system. Any identification number that you assign to a piece of equipment on the equipment master must be unique throughout your entire system.

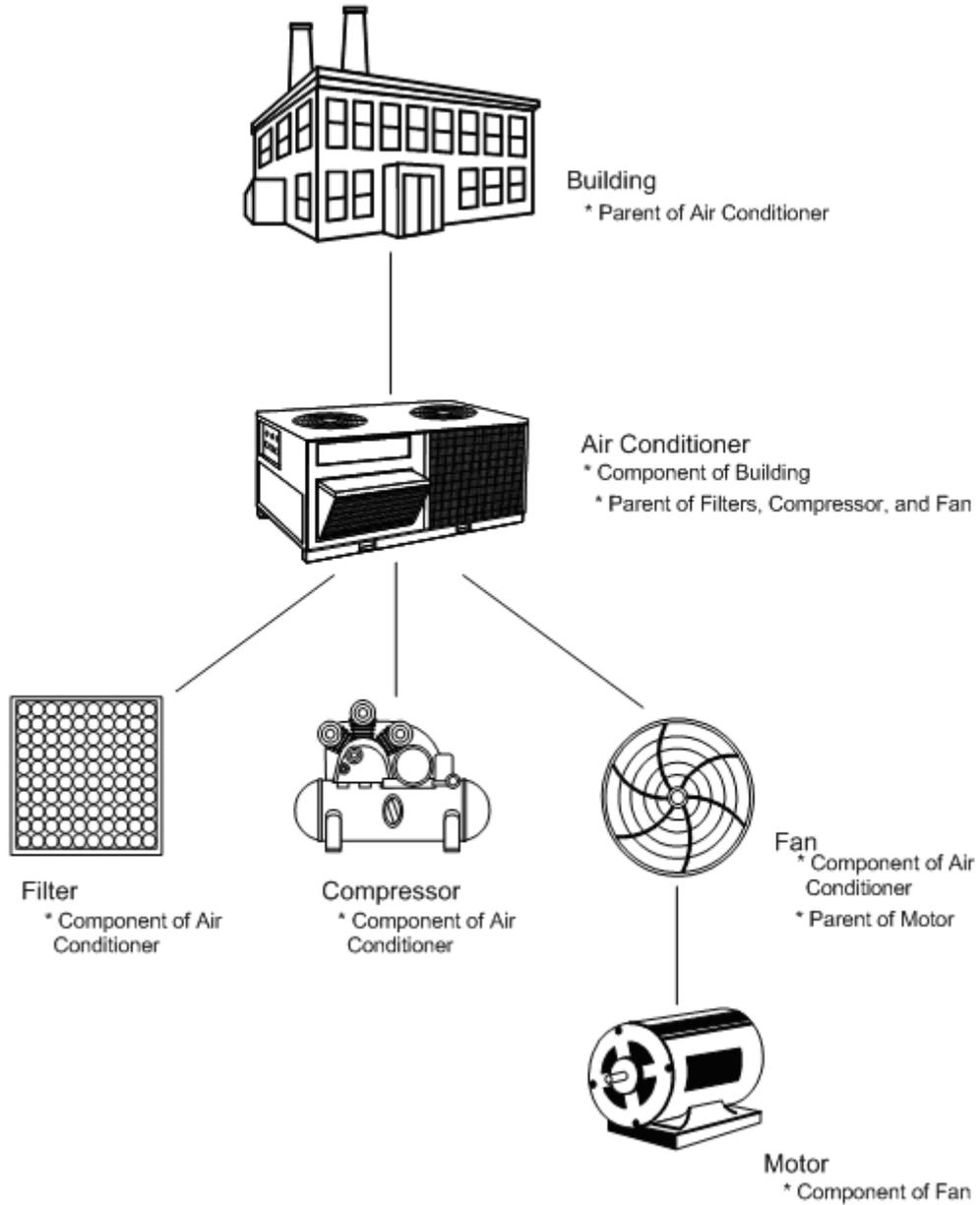
2.2.5 Parent and Component Relationships

You can set up parent and component relationships to group individual pieces of equipment. For example, when you create master information, you can identify a building as a parent item. One of its components might be an air conditioner. The component of one item can also be the parent of another. For example, the air conditioner might be the parent of a number of components, including a motor, filters, and a compressor. Those components, in turn, might be the parents of still other components, and so on.

You can establish up to 25 hierarchical levels of parent and component relationships. The system assigns each component a number according to its level in the hierarchy. This is particularly useful to track and report on complex equipment assemblies.

The following graphic illustrates a typical relationship between parent and component equipment:

Figure 2-1 Relationship Between Parent and Component Equipment



Create an Equipment Master

This chapter contains this topic:

- [Section 3.1, "Creating an Equipment Master"](#)

3.1 Creating an Equipment Master

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Information**

From **Equipment Information (G1311)**, choose **Equipment Master**

You must create an equipment master for every piece of equipment that you plan to manage throughout the system. When you create an equipment master, you establish basic information about the equipment, such as:

- Equipment number
- Description
- Account coding
- Category codes

Equipment master information is stored in the Item Master table (F1201). The system accesses this table every time you request any type of transaction for a piece of equipment.

3.1.1 What You Should Know About

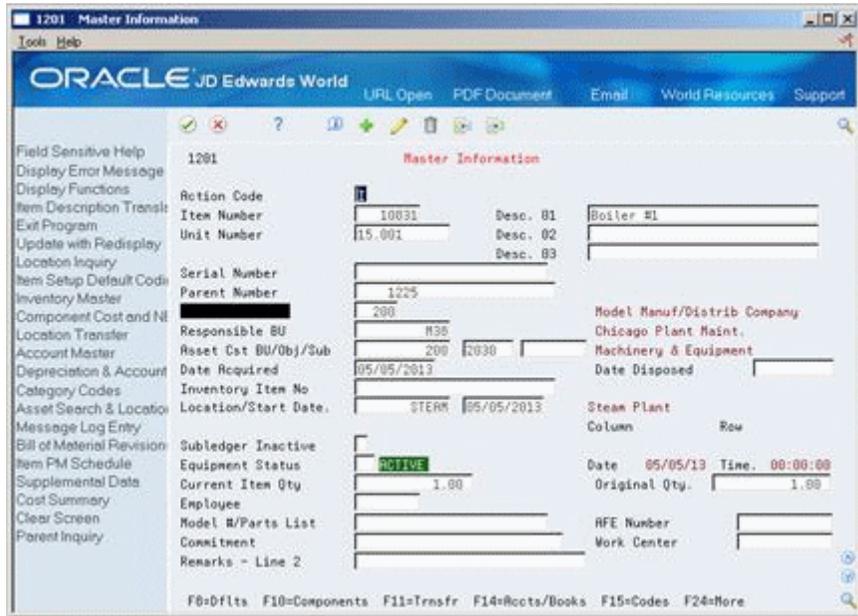
Topic	Discussion
Equipment identification numbers	<p>You can use up to three numbers to identify equipment throughout your system.</p> <ul style="list-style-type: none"> ■ Item number (Asset number) - An 8-digit number that the system assigns to each equipment master ■ Unit number - A 12-digit, alphanumeric character that the user assigns to a piece of equipment ■ Serial number - A 25-digit, alphanumeric character that the manufacturer assigns to a piece of equipment <p>Different branches of your company might refer to equipment in different ways. For example, accounting personnel might prefer to identify equipment by an item number. Maintenance personnel might refer to equipment by the manufacturer's serial number or a company-assigned unit number.</p>

Topic	Discussion
Changing a unit or serial number	You can change the unit or serial number, but you must run the P12804 program to update the PM Schedule File F1207 and the Work Order File, F4801. you should run this program periodically to ensure that no changes have been made to the Equipment Master Unit, or that the serial numbers have not been updated to the PM and Work Order file.
Category codes	<p>If you use Equipment/Plant Maintenance with the JD Edwards World Fixed Assets system, the two systems access the same category code tables. Depending on how you set up your system, the system displays the first 5 or 10 of 23 category codes on the Equipment Search screen.</p> <p>Typically, Equipment/Plant Maintenance users access the Equipment Search screen more frequently than Fixed Asset users. In addition, Equipment/Plant Maintenance users frequently use the first 10 category codes as selection criteria for several tasks, such as selecting equipment for updating meter readings, selecting equipment for updating PM schedules, and so on. You should reserve as many of the first 10 category codes in the equipment master as you need for equipment maintenance purposes.</p>

To create an equipment master

On Equipment Master

Figure 3–1 Master Information screen



1. Complete the following fields:
 - Description 01
 - Company
 - Responsible Business Unit
 - Asset Cost Business Unit/Object/Subsidiary
 - Date Acquired

2. Complete the following optional fields:

- Unit Number
- Serial Number
- Parent Number
- Equipment Status
- Original Quantity
- Location/Start Date

Depending on how you set processing options, you might be required to enter location and start date information. If you do not enter a location and start date when you create the equipment master and later need to establish this information, you must use Location Tracking.

3. Complete the following optional maintenance fields:

- Inventory Item Number
- Work Center

4. To add the record, place an 'A' in the action code field and key in the pertinent information.

5. Choose the Item Description Translation Window function.

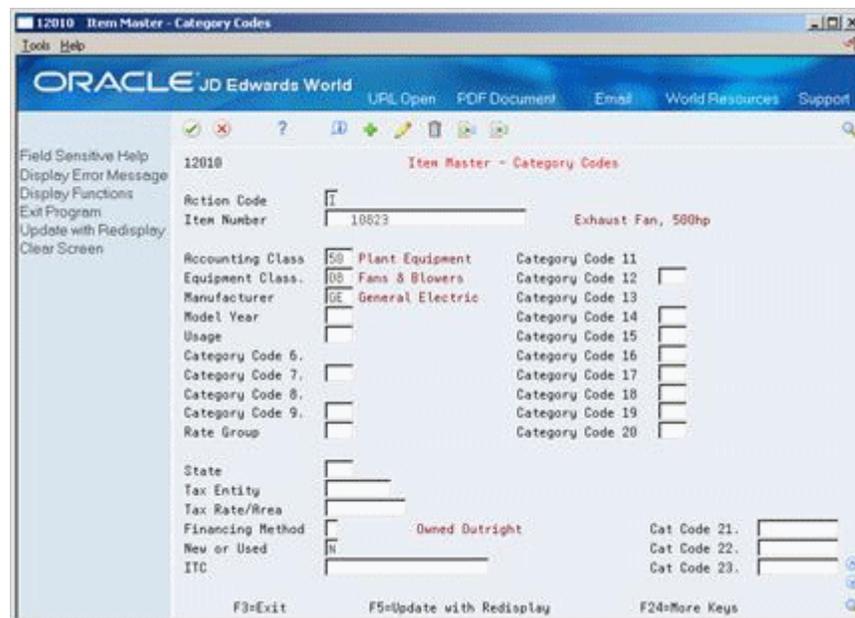
6. On Item Description Translation, complete the following fields to add or revise the non-domestic descriptions for the piece of equipment:

- Language
- Description

7. To return to Equipment Master, choose Exit Program.

8. On Equipment Master, choose Category Codes.

Figure 3–2 Item Master - Category Codes screen



9. On Item Master - Category Codes, complete any of the category code fields to assign category codes to the piece of equipment.

Depending on how you set processing options, you might be required to enter category code information when you create a new equipment master. In addition, you might not be allowed to enter or change certain values on Item Master - Category Codes. Some fields might contain default values. In addition, Category Code 10 (Rate Group) is reserved for equipment billing.

10. To enter depreciation and tax information, complete the following optional fields:
- State
 - Tax Entity
 - Tax Rate/Area
 - New or Used
 - Investment Tax Credit

Field	Explanation
Desc. 01	<p>A user defined name or remark.</p> <p><i>Form-specific information</i></p> <p>The system displays the first line of the user defined description on all screens and reports. You can use any part of the description line when you locate an asset using the query search on the Search and Location screen.</p>
Unit Number	<p>An alternate identification code that a company assigns to assets. This is commonly the number stenciled on the equipment. You can enter alphanumeric unit numbers up to 12-characters long. You are not required to use a unit number to identify equipment. Every equipment unit number must be unique.</p>
Serial Number	<p>A 25-character alphanumeric number that you can use as an alternate asset identification number. You might use this number to track assets by the manufacturer's serial number. You are not required to use a serial number to identify an asset. Every serial number you enter must be unique.</p>
Parent Number	<p>A parent number groups related components together. Each item of property and piece of equipment can be associated with a parent item, if desired. For example, a mobile telephone can be associated with a specific automobile (the parent), a printer can be associated with a computer (the parent), or a flat bed can be associated with a specific truck chassis (the parent).</p> <p>Note: If this is a data entry field, the default value is the item number. For example, if the item number is 123, the system assigns 123 to the parent number.</p> <p><i>Form-specific information</i></p> <p>If you leave this field blank, the system automatically assigns it the same number as the master item number. For example, if the master item number is 123, the system will assign it number 123.</p>

Field	Explanation
Company	<p>A code that identifies a specific organization, fund, entity, and so on. This code must already exist in the Company Constants table (F0010). It must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p> <p>Note: You can use company 00000 for default values, such as dates and automatic accounting instructions (AAIs). You cannot use it for transaction entries.</p> <p><i>Form-specific information</i></p> <p>The system uses the company number from the parent master record as a default value for this field when you set up parent/component relationships.</p>
Responsible BU	<p>An alphanumeric field 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, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p> <p><i>Form-specific information</i></p> <p>If you want the asset or accumulated depreciation business units to use the default value for the responsible business unit, the responsible business unit and company number must be in the same company. You set up the default business unit on the Fixed Assets Constants screen.</p>
Asset Cost Account - Business Unit	<p>The business unit to which the system charges original acquisition cost and any supplemental capital additions. The system uses a default value for this field based on the value you specify on the Master Information screen when you create a new asset master record. You can change this default value on Depreciation Information only if you have not entered any transactions for the account.</p>
Inventory Item No	<p>A number that the system assigns to an item. It can be in short, long, or 3rd item number format.</p> <p><i>Form-specific information</i></p> <p>This is a number assigned in the Inventory Management system that identifies equipment repair parts, parts lists, and routings that relate to this asset or piece of equipment. For example, the number could identify a replacement part for which inventory is maintained. This number could also identify the parts list and routing used to maintain this piece of equipment. This number is informational only. The system verifies against the Inventory Master.</p>

Field	Explanation
Work Center	<p>A code that represents a high-level business unit. It can be used to reference a branch or plant that might have departments or jobs, which represent lower-level business units (data item MCU), subordinate to it. For example:</p> <ul style="list-style-type: none"> ■ Branch/Plant (MMCU) ■ Dept A (MCU) ■ Dept B (MCU) ■ Job 123 (MCU) <p>Business unit security is based on the higher-level business unit.</p> <p><i>Form-specific information</i></p> <p>This is the manufacturing work center to which the system refers to calculate machine hours for a maintenance work order. When you create a work order for the equipment and attach routing instructions, the system includes this work center as a final routing instruction. The system totals the duration of the previous routing steps to determine machine hours for capacity planning.</p>
Equipment Status	<p>A user defined code (12/ES) that identifies the equipment or disposal status of an asset, such as available, down, or disposed.</p> <p><i>Form-specific information</i></p> <p>The system updates the value in this field when you run the Asset Disposal program to dispose of the asset.</p>
Original Qty	<p>The original number of units for an asset. If assets are purchased and accounted for in quantities (more than one), you can specify the original quantity purchased. For example, if you purchase 100 office chairs, you would set up one asset item with an original quantity of 100. Then, as you disposed of office chairs, you would adjust the current quantity to reflect the current balance. This allows you to track assets purchased in bulk quantity on one master record.</p>
State	<p>A user defined code system 00, type S for the state or province. This is usually a postal service abbreviation.</p>
Tax Entity	<p>The address number of the tax authority to which property taxes are paid.</p>
Tax Rate/Area	<p>A code that identifies a tax or geographic area that has common tax rates and tax distribution. The tax rate/area must be defined to include the tax authorities (for example, state, county, city, rapid transit district, or province), and their rates. To be valid, a code must be set up in the Tax Rate/Area table (F4008).</p> <p>Typically, U.S. sales and use taxes require multiple tax authorities per tax rate/area, whereas VAT requires only one simple rate.</p> <p>The system uses this code to properly calculate the tax amount.</p>

3.1.2 What You Should Know About

Topic	Discussion
Equipment status	You can change the status of a piece of equipment at any time. When you change equipment status, the system automatically records the current meter readings for the piece of equipment at the time of the status change and stores the information in the Status History table (F1307).
Revising inactive equipment masters	If you enter a 1 in the Subledger Inactive field and later need to revise the equipment master, you must first remove the value in the field. If the asset number is the same as the parent asset number, you must also remove the parent asset number before the system accepts changes to the record.
Updating property tax information	<p>When you enter property tax information, the system stores the information in the Item Master table (F1201) for the piece of equipment. If you relocate equipment to areas with different taxing authorities, you can update the tax information directly from Item Master - Category Codes, or when you:</p> <ul style="list-style-type: none"> ■ Enter location information using Transfer Processing ■ Revise location information using Location Revisions <p>When you enter property tax information using either Transfer Processing or Location Revisions, processing options enable you to interactively update the tax information in the Item Master table at the same time.</p> <p>See Section 9.1, "Tracking Equipment Location".</p>

3.1.3 Processing Options

See [Section 53.1, "Item Master Information \(P1201\)"](#).

Enter Additional Detailed Information

This chapter contains these topics:

- [Section 4.1, "Entering Additional Detailed Information"](#)
- [Section 4.2, "Working with Supplemental Information"](#)
- [Section 4.3, "Entering Specification Information"](#)
- [Section 4.4, "Entering Permit and License Information"](#)

4.1 Entering Additional Detailed Information

You can enter information to further define your equipment in the system. The system stores this detailed equipment information in user defined databases. Use this detailed information to report and track information that is important to your organization, but is not included in the equipment master information.

4.2 Working with Supplemental Information

You can enter supplemental information for a piece of equipment that is not included in the equipment master. The information you enter can then be used to enhance your ability to track, review, and report on the equipment in your system. You can define and maintain any type of supplemental data you need. For example, you might set up supplemental data for motor graders. The data might include vibration readings, oil readings, condition reports, and so on.

Working with supplemental information consists of the following tasks:

- Entering supplemental information
- Reviewing supplemental information by data type
- Reviewing supplemental information by equipment

After you have entered supplemental data, you can review the information using the following formats:

Format	Description
By data type	You can review a list of additional equipment information based on a particular supplemental data type. For example, assume that you have set up a supplemental data type for capacity. You can review a list of all equipment for which you have assigned the supplemental data type for capacity. You can use date selections to limit the amount of information that the system displays.

Format	Description
By equipment	You can review a list of the additional information by supplemental data type that you assigned to individual pieces of equipment. For example, you can review information for all supplemental data types that you assigned to a particular motor grader. You can use date selections to limit the amount of information that the system displays.

4.2.1 Before You Begin

- Set up data types for supplemental information. See [Section 35.3.1, "Defining Supplemental Data Types"](#)

See Also:

- [Section 35.3.9, "Setting Up Supplemental Data Security"](#) for more information about supplemental data security

4.2.2 Entering Supplemental Information

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

From Equipment Information (G1311), choose Supplemental Data

From Supplemental Data (G1318), choose Data Entry

Enter supplemental information to track, review, and report on additional information that is not contained in the equipment master.

When you enter supplemental data for a particular data type, the OP (Option) field for that data type is highlighted. You can set up supplemental data security to limit the number of users who are authorized to view data.

You can use any of the following formats to enter and display supplemental data:

Format	Description
Narrative (N)	Use this data type to access the Supplemental Text Entry screen. You can use this text format to enter unlimited information about equipment.
Columnar (C)	Use this data type to access the Supplemental Code Entry screen. When you set up supplemental data screens using this data type, you can define the columns into which you enter information. The system edits the values that you enter in the columns against the user defined code table you set up in Data Type Definition.
Columnar-Message (M)	Use this data type to access the Supplemental Code Entry screen. You can use this data type in the same way as the columnar type. The only difference is that the system edits the values you enter in the columns of this data type against the generic rates and messages table you set up in Data Type Definition.

To enter supplemental information

On Data Entry

3. On User Defined Code Entry - Fixed Assets, complete the appropriate fields.
4. To enter text for a specific line of code, enter 1 (Text) in the Option field (C and M display formats only).
5. To review or change the standard message, for example, Standard Procedures, select Generic Message (M display mode only).

4.2.3 What You Should Know About

Topic	Discussion
Entering additional text	You can use the Text option to enter additional information for equipment in text format, including supplemental data forms that you have defined as columnar.
Choosing Specification Sheets	If you choose Specification Sheets (SP) from Data Entry, the system displays the Specification Data Entry screen. See Section 4.1, "Entering Additional Detailed Information" for more information about using specification sheets.

4.2.4 Reviewing Supplemental Information by Data Type

Navigation

From Equipment/Plant Management (G13), choose **Equipment Information**

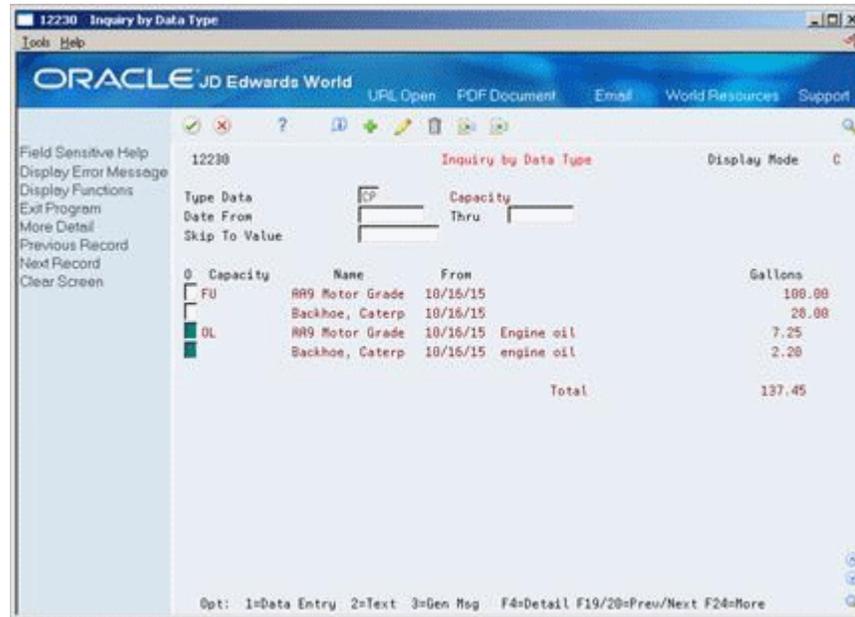
From Equipment Information (G1311), choose **Supplemental Data**

From Supplemental Data (G1318), choose **Inquiry by Data Type**

You can review a list of additional equipment information based on a particular supplemental data type. For example, assume you have set up a supplemental data type for capacity. You can review a list of all equipment for which you have assigned the supplemental data type for capacity. You can use date selections to limit the amount of information that the system displays.

4.2.5 To review supplemental information by data type

On Inquiry by Data Type

Figure 4-3 Inquiry by Data Type screen

1. Complete the following field:
 - Type Data
2. To limit the information that the system displays, complete the following optional fields:
 - Date From
 - Thru

4.2.6 Reviewing Supplemental Information by Equipment

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

From Equipment Information (G1311), choose Supplemental Data

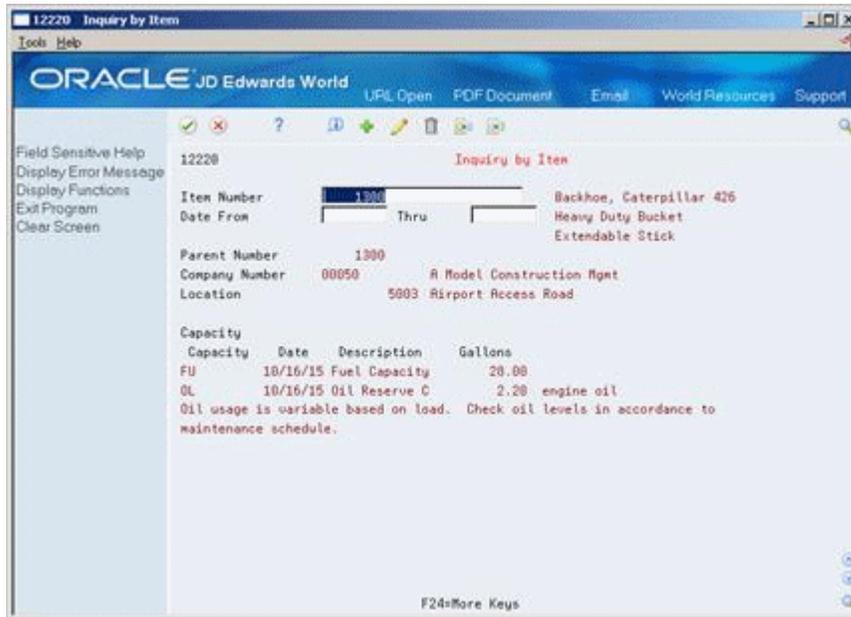
From Supplemental Data (G1318), choose Inquiry by Item

You can review a list of the additional information by supplemental data type that you assigned to individual pieces of equipment. For example, you can review information for all supplemental data types that you assigned to a particular motor grader. You can use date selections to limit the amount of information that the system displays.

4.2.7 To review supplemental information by equipment

On Inquiry by Item

Figure 4–4 Inquiry by Item screen



1. Complete the following field:
 - Item Number
2. To limit the information that the system displays, complete the following optional fields:
 - Date From
 - Thru

4.3 Entering Specification Information

Navigation

From Equipment/Plant Management (G13), choose **Equipment Information**

From Equipment Information (G1311), choose **Supplemental Data**

From Supplemental Data (G1318), choose **Specification Data Entry**

You can use specification data to enter static information for each piece of equipment. For example, you might set up specification data to record and report on the information from the equipment's nameplate and the manufacturer's specification sheets.

Data Source	Description
Equipment nameplates	A nameplate is the metal plate or other label attached to a piece of equipment. The nameplate often includes information about the equipment, such as: <ul style="list-style-type: none"> ■ Model number ■ Power requirements ■ Manufacture date

Data Source	Description
Specification sheets	<p>Specification sheets come from the equipment manufacturer. Specification sheets include specific information about a piece of equipment, such as:</p> <ul style="list-style-type: none"> ■ Operating and safety instructions ■ Power ■ Dimensions

You can define the specification data that you want to keep, in which positions the data is entered, and the length of the data fields. You can also set up the specification database so that the system will edit the data against user defined code tables or a specific table.

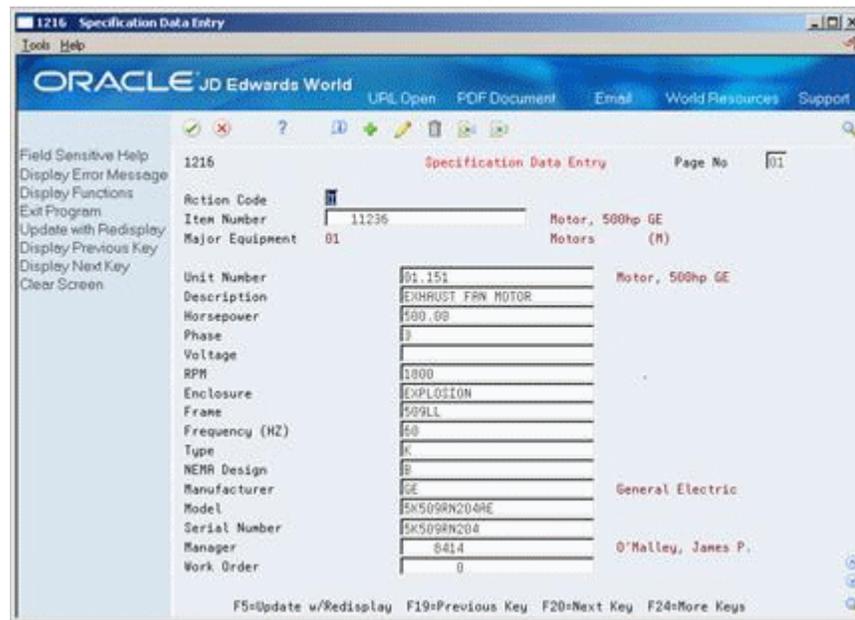
4.3.1 Before You Begin

- Set up specification types for specification information. See [Section 35.3, "Setting Up Supplemental Data"](#).

To enter specification information

On Specification Data Entry

Figure 4–5 Specification Data Entry screen



1. Complete the following field:

- Item Number

2. Complete all appropriate fields.

The fields that appear on this screen vary, depending on the data fields that you set up on Specification Cross Reference.

3. If more than 16 specification fields are defined for the equipment, complete the following field:

Field	Explanation
Agency Number	Identifies the agency responsible for issuing this license. This is an address book number, which stores a telephone number and address information.

4.4.2 Processing Options

See [Section 53.6, "Permit and License Tracking \(P1206\)"](#).

Search for Equipment Information

This chapter contains this topic:

- [Section 5.1, "Searching for Equipment Information"](#)

5.1 Searching for Equipment Information

You can use Equipment Search to locate any piece of equipment. For example, if you need to transfer a piece of equipment, but you don't know its identification number, you can locate the equipment by entering the equipment's description on Equipment Search. You can also use the other equipment information that you know, such as equipment status or location, to search for all pieces of equipment that share the same characteristics.

Use Equipment Search to complete multiple tasks with a single piece of equipment. For example, after you locate a piece of equipment, you can access the Completed PM program directly from Equipment Search, without returning to the Equipment/Plant Maintenance menu.

Searching for equipment information consists of the following tasks:

- Searching for equipment by field
- Searching for equipment by query

Some of the tasks that you can perform from Equipment Search include:

- Updating equipment master information
- Reviewing location information
- Entering equipment messages
- Reviewing component relationships
- Accessing cost summary information
- Creating location tracking information
- Revising supplemental data
- Reviewing parent and component history information

The following graphic illustrates the criteria by which you can search for equipment, and many of the features that you can access directly from Equipment Search.

Figure 5-1 Equipment Search Criteria



Search for Equipment by:

- Company
- Equipment Status
- Description
- Responsible Business Unit
- Location
- Category Codes



Exit to:

- Equipment Master
- Location Transfer
- Parent History Inquiry
- Search Like Equipment
- Equipment Component Relations
- Message Log Review
- Cost Summary
- Supplemental Data
- Location History
- License Tracking
- Backlog Management
- Completed PM
- Log Entry

criteria by which you can search for equipment, and many of the features that you can access directly from equipment search.

5.1.1 Before You Begin

- You must build a search word table to perform a query search. See [Section 41.3, "Updating the Search Word Table"](#).

5.1.2 What You Should Know About

Topic	Discussion
Alternate formats	Use the function keys to toggle the information that displays on Equipment Search without having to access the detail portion of the screen. For example, one format displays the equipment number, equipment description, and job number. To view the Remark field, you must choose Full Detail. The other format displays the equipment description and Remark field, but you must select Full Detail to view the equipment number.
Query search mode	Use the function keys to toggle between field search and query search mode.
Parent and component relationships	Pieces of equipment that are components of parent equipment appear indented on Equipment Search. Depending on your search criteria, indented entries are not necessarily the components of preceding entries.
Multi-language searches	You must use the Lng (Language) field to search for equipment descriptions in multiple languages. The system searches for descriptions in your preferred language unless you indicate a different language in this field.

5.1.3 Searching for Equipment by Field

Navigation

From Equipment/Plant Management (G13), choose **Equipment Information**

From Equipment Information (G1311), choose **Equipment Search**

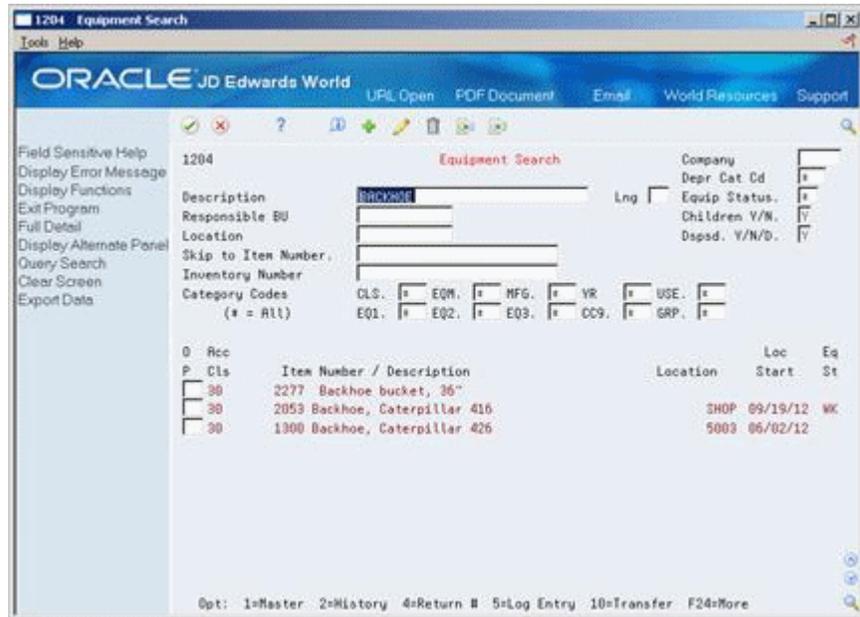
When you search for equipment by field, you can locate groups of similar equipment or individual pieces of equipment. The more fields you complete on the search screen, the closer you narrow your search to a specific piece of equipment.

For example, if you need to see a list of all of your company's backhoes, you can enter as much information as you know about the backhoes. The system searches the equipment information databases and displays all equipment that meets the criteria that you enter in the fields.

To search for equipment by field

On Equipment Search

Figure 5–2 Equipment Search screen



To search for equipment, complete any combination of the following fields:

- Skip to Item Number
- Company
- Depr Cat Cd (Depreciation Category Code)
- Equip Status
- Description
- Responsible BU
- Location
- Inventory Number
- Category Codes 01 - 10

Field	Explanation
Equip Status	A user defined code (12/ES) that identifies the equipment or disposal status of an asset, such as available, down, or disposed.
Inventory Number	<p>A number that the system assigns to an item. It can be in short, long, or 3rd item number format.</p> <p><i>Form-specific information</i></p> <p>This is a number assigned in the Inventory Management system that identifies equipment repair parts, parts lists, and routings that relate to this asset or piece of equipment. For example, the number could identify a replacement part for which inventory is maintained.</p> <p>This number could also identify the parts list and routing used to maintain this piece of equipment.</p> <p>Note: This number is informational only and is edited against the Inventory Master.</p>

5.1.4 What You Should Know About

Topic	Discussion
Using category codes and equipment status	<p>If you do not want the system to limit the search by category code or status, you must enter an asterisk (*) in the category code fields or the equipment status field.</p> <p>For example, if you enter an asterisk in the Category Code field for Major Equipment Class, the system searches for equipment from all major equipment classes that also meets the other search criteria that you specify.</p>
Using an asterisk in a search field	<p>When you enter an asterisk (*) in one of the category code fields or the Equipment Status field, the system locates all equipment with any value in those fields.</p>
Searching for equipment by parts list	<p>You can narrow your search to pieces of equipment that use the same parts list by entering the number of the parts list in the Inventory Number field.</p>

5.1.5 Searching for Equipment by Query

Navigation

From Equipment/Plant Management (G13), choose **Equipment Information**

From Equipment Information (G1311), choose **Equipment Search**

You can perform a query search using characters that represent only partial information. Use an asterisk (*) to perform a wildcard query. For example, if you enter CAT* as the query, the system searches the Asset Master and Supplemental database. The system retrieves all equipment that include a word that begins with CAT in the Description fields, or any of the category code fields, such as Category, Caterpillar, and so on.

To search for equipment by query

On Equipment Search

1. Complete the following field:

- Description

Enter characters that might exist in any of the following Equipment Master fields: Description, Category Code, AFE Number and Remark fields. You can also enter characters that might exist in any of the following Supplemental Data fields: User Defined Code, Narrative Text, and Remark.

2. Choose Query Search.

You remain in Query Search mode until you toggle to regular search mode.

5.1.6 What You Should Know About

Topic	Discussion
Query searches using supplemental data	<p>If you want to perform query searches based on information in the supplemental data database, you must indicate so when you define the supplemental data types.</p> <p>See Section 35.3, "Setting Up Supplemental Data".</p>

5.1.7 Processing Options

See [Section 53.2, "Equipment Search Display Format \(P1204\)"](#).

Work with Message Logs

This chapter contains these topics:

- [Section 6.1, "Working with Message Logs"](#)
- [Section 6.2, "Entering an Equipment Message"](#)
- [Section 6.3, "Reviewing Equipment Messages"](#)

6.1 Working with Message Logs

You can use message logs to enter short text messages that pertain to a piece of equipment. You can also set up tickler dates or units on which you want to receive a reminder message for the equipment.

For example, you can indicate a unit meter reading, such as miles or hours, or a specific date when you want an equipment operator to receive a reminder message for the scheduled maintenance of a piece of equipment.

6.2 Entering an Equipment Message

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Information**

From **Equipment Information (G1311)**, choose **Equipment Message Log**

You can use message logs to enter short text messages that pertain to a piece of equipment. You can also set up tickler dates or units on which you want to receive a reminder message for the equipment.

You can only enter equipment messages from this screen. To display messages, use **Equipment Search**. To print messages, you must run the **Maintenance Log**.

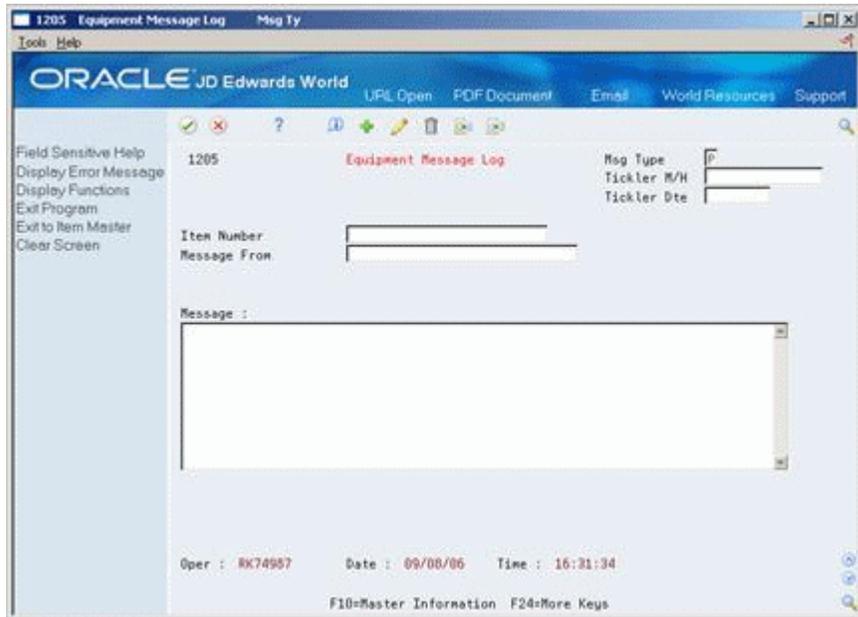
You can classify messages by setting up message types, such as planned and actual maintenance, and problem reports. Use the information that you enter to:

- Track problems and complaints about specific equipment.
- Supplement scheduled or preventive maintenance.
- Report on actual maintenance.

To enter an equipment message

On **Equipment Message Log**

Figure 6-1 Equipment Message Log screen



1. Complete the following fields:
 - Item Number
 - Message From
2. Type a text message in the following field:
 - Message
3. Complete the following optional fields:
 - Msg Type
 - Tickler M/H (Miles/Hours)
 - Tickler Dte

6.2.1 What You Should Know About

Topic	Discussion
Using tickler miles or hours	If you use tickler miles or hours, you must run the global Update Message Log program as often as you update meter readings. See Section 41.2, "Updating the Message Log" .

6.2.2 Processing Options

See [Section 53.3, "Item Message Entry - Actual \(P1205\)"](#)

See [Section 53.4, "Item Message Entry - Planned \(P1205\)"](#)

See [Section 53.5, "Item Message Entry - Problem \(P1205\)"](#)

6.3 Reviewing Equipment Messages

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

From Equipment Information (G1311), choose Equipment Search

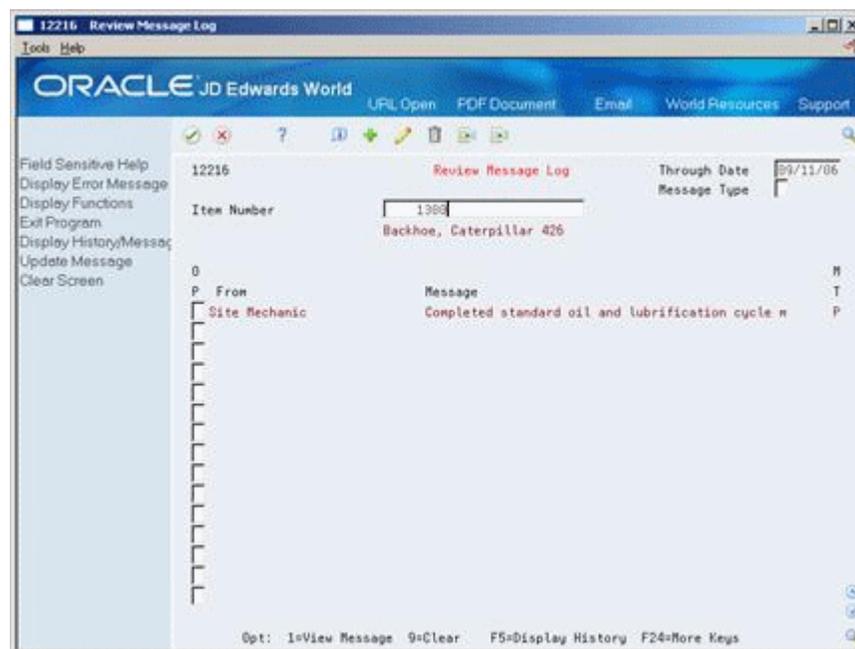
You should periodically review messages to ensure that you have the most current information about a piece of equipment. If a message exists for a piece of equipment, the system highlights the Equipment Number and Description fields on the Equipment Search screen.

To review equipment messages

On Equipment Search

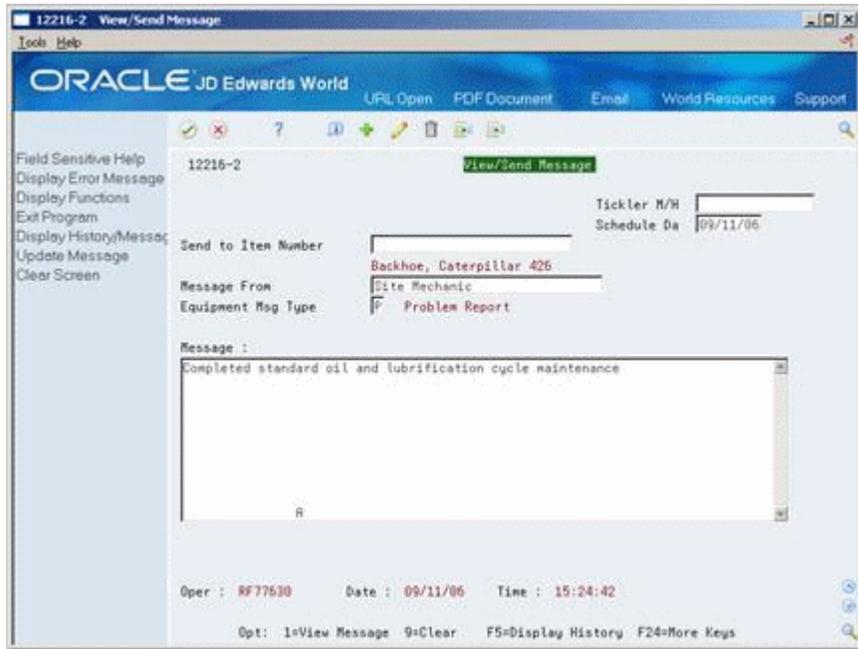
- To locate a piece of equipment, complete any of the following fields:
 - Description
 - Company
 - Responsible Business Unit
 - Location
 - Skip to Equipment Number
 - Inventory Number
 - Equipment Status
 - Category Codes 01-10
- Choose Review Message Log.

Figure 6–2 Review Message Log screen



- On Review Message Log, choose View Message for a line item. The View/Send Message screen displays.

Figure 6-3 View/Send Message screen



See Also:

- [Section 5.1, "Searching for Equipment Information"](#)

Review Parent and Component Information

This chapter contains these topics:

- [Section 7.1, "Reviewing Parent and Component Information"](#)
- [Section 7.2, "Reviewing Parent and Component History"](#)

7.1 Reviewing Parent and Component Information

After you establish parent and component relationships in the equipment master, you can review all the components for a specific piece of equipment. Review parent and component relationships so you can:

- Report on equipment costs at the parent or component level.
- Track up to 25 levels of component relationships.

7.2 Reviewing Parent and Component History

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

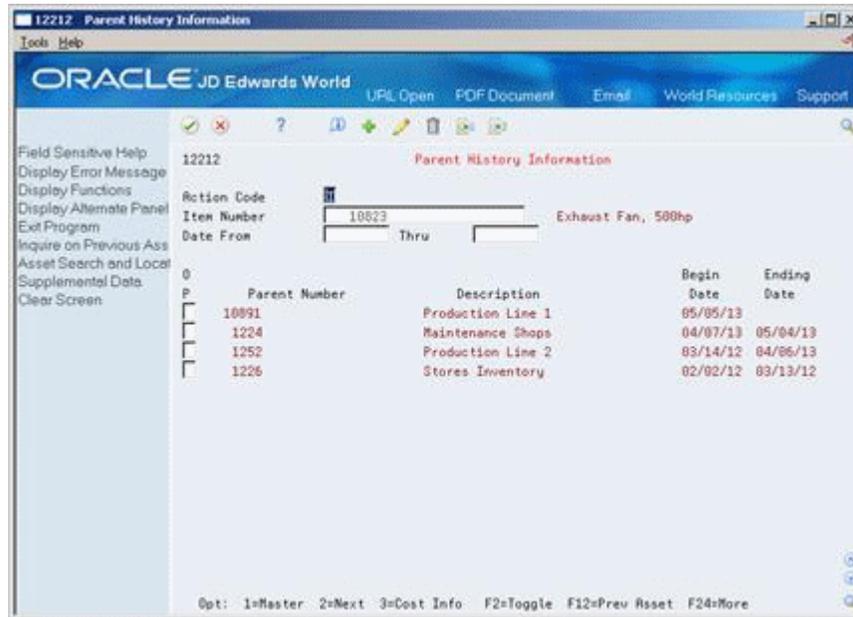
From Equipment Information (G1311), choose Parent History Information

Use Parent History Inquiry to review parent and component history. You can toggle between parent and component history to display all current or previous parents for a component or all current or previous components for a parent. Use date fields to limit your search to selected dates, or leave the date fields blank to review the entire history of a component or parent.

To review parent and component history

On Parent History Inquiry

Figure 7-1 Parent History Information screen



1. Complete the following field:
 - Item Number
2. To alternately display component history, press F2 (Toggle).

7.2.1 Processing Options

See [Section 53.8, "Parent History Information \(P12212\)"](#)

7.2.2 Reviewing Current Equipment Components

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Information**

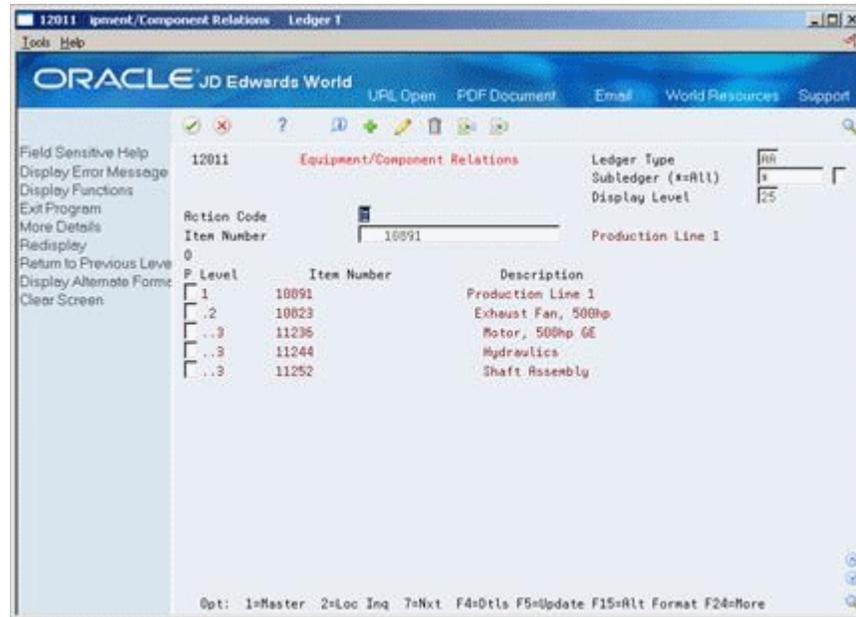
From **Equipment Information (G1311)**, choose **Equipment/Component Relations**

You can use Equipment/Component Relations to display up to 25 levels of component information for a selected piece of equipment. This is particularly useful if you need to review component information for complex equipment assemblies, such as a production line. After you locate a component, you can display its immediate parent or display its components.

To review current equipment components

On **Equipment/Component Relations**

Figure 7-2 Equipment/Component Relations screen



1. Complete the following field:
 - Item Number
2. To limit the level of components displayed, complete the following optional field:
 - Display Level
3. To access the component information that you need, choose the appropriate option.

Field	Explanation
Display Level	<p>A number that identifies the number of levels of components you want to view. For example, if you specify level 3, you can view the following:</p> <ul style="list-style-type: none"> Level 1 - The parent asset Level 2 - Any children associated with the Level 1 parent Level 3 - Any children associated with a Level 2 parent <p>You can view up to 25 levels of components.</p>

7.2.3 What You Should Know About

Topic	Discussion
Displaying parent information	Choose Display Parent to display a component's immediate parent.
Displaying the next component level	Choose Next Level to display all components of a specific piece of equipment. The component for which you select Next Level moves to the first display level, and its components display beneath it, according to the display level you choose.
Changing parent and component relationships	You can make changes to equipment parent and component relationships by changing the parent number for a piece of equipment on the equipment master.

Topic	Discussion
Displaying by category code	When you search by category code, the system displays only the children that have the same category code as the parent if you search by category code

7.2.4 Processing Options

See [Section 53.7, "Assembly Components and NBV \(P12011\)"](#).

Equipment Information Tracking

This chapter contains these topics:

- [Section 8.1, "Objectives"](#)
- [Section 8.2, "About Equipment Information Tracking"](#)

8.1 Objectives

- To enter and revise location transactions for equipment
- To track costs at the business or shop level
- To track costs at the equipment level

8.2 About Equipment Information Tracking

Use Equipment Information Tracking to control equipment movement and review equipment costs. For example, you can use various location programs to:

- Record equipment relocations from one job or business unit to another.
- Create location transactions for single pieces of equipment or groups of equipment.
- Relocate equipment with a quantity greater than one from a single location to multiple locations.
- Relocate equipment from multiple locations to a single location to consolidate multiple tracking records.
- Review historical, current and planned location tracking information
- Record equipment relocations out of sequence.
- Add text to equipment location transactions.

You can also record simple relocations for single pieces of equipment or more complex relocations for multiple pieces of equipment.

You can assign equipment to multiple current locations or relocate equipment from multiple current locations to one location. You can also record equipment relocations out of sequence. For example, you can use the system's planning capability to record the relocation of equipment from a location where it does not currently reside.

When you enter relocation information for a parent piece of equipment, the system automatically transfers all components that are at the same location to the new location.

You can use cost tracking programs to:

- Review maintenance costs by shop or by piece of equipment.
- Review one subledger or all subledgers for a piece of equipment.
- Display detailed or summarized account balance information.
- Display equipment costs in currency amounts or in units and per unit costs.

Equipment information tracking consists of the following tasks:

- Tracking equipment location
- Reviewing maintenance costs

Permit and License tracking provides the ability to store and track permit, license and certificate information about equipment. Information is sorted first by state and next by license number. This allows you to include license dates in sort criteria. The ability to sort by license date makes it easier to quickly locate licenses, and minimizes the chance of overlooking pending renewal dates.

Track Equipment Location

This chapter contains these topics:

- [Section 9.1, "Tracking Equipment Location"](#)
- [Section 9.2, "Entering Location Information"](#)
- [Section 9.3, "Reviewing Location Information"](#)
- [Section 9.4, "Revising Location Information"](#)

9.1 Tracking Equipment Location

You can record equipment location information to indicate where and when equipment is physically moved. You can update equipment location information for planned and current relocations, and keep a log of all historical relocations.

Use Equipment Location Tracking to record equipment movement. For example, you can:

- Record equipment relocations from one job or business unit to another.
- Create location transactions for single pieces of equipment or groups of equipment.
- Relocate equipment from multiple locations to a single location to consolidate multiple tracking records.
- Review historical, current and planned location tracking information.
- Record equipment relocations out of sequence.
- Associate text with equipment location transactions.

9.2 Entering Location Information

Navigation

From Equipment/Plant Management (G13), choose Equipment Location Tracking

From Equipment Location Tracking (G1314), choose Transfer Processing

You enter equipment location information into the system so you can track equipment locations as you physically transfer equipment from one job site or business unit to another. If you have multiple quantities of an equipment item, such as scaffolding, you can also:

- Relocate quantities of the same equipment item to more than one current location.

- Relocate quantities of the same equipment item to a single location from more than one current location.

When you create equipment location information, you enter location information into the system. The system uses the location information that you enter to update the Location Tracking table (F1204). You can use the following methods to create equipment location transactions:

Method	Description
Enter location information without inquiry	Use this method to enter location information without reviewing existing location information first. For example, you might want to use this method if you need to relocate several pieces of equipment and you do not want to review the current location information for each piece individually. When you use this method, you enter all the required location information from a blank screen.
Enter location information with inquiry	Use this method to review equipment location information before entering additional location information for a piece of equipment. This method is especially useful when you need to relocate several pieces of equipment from one location to another location.

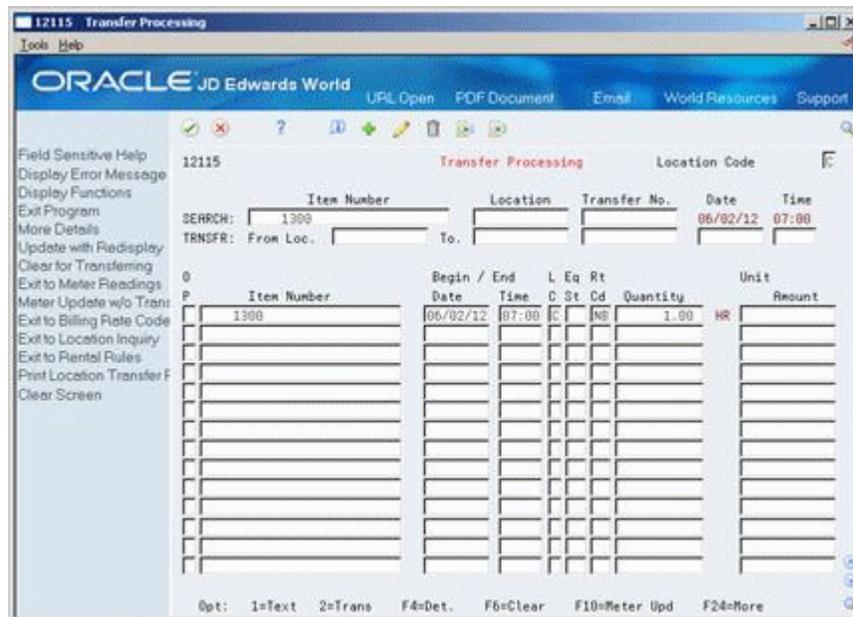
Entering location information consists of the following tasks:

- Entering location information without inquiry
- Entering location information with inquiry

To enter location information without inquiry

On Transfer Processing

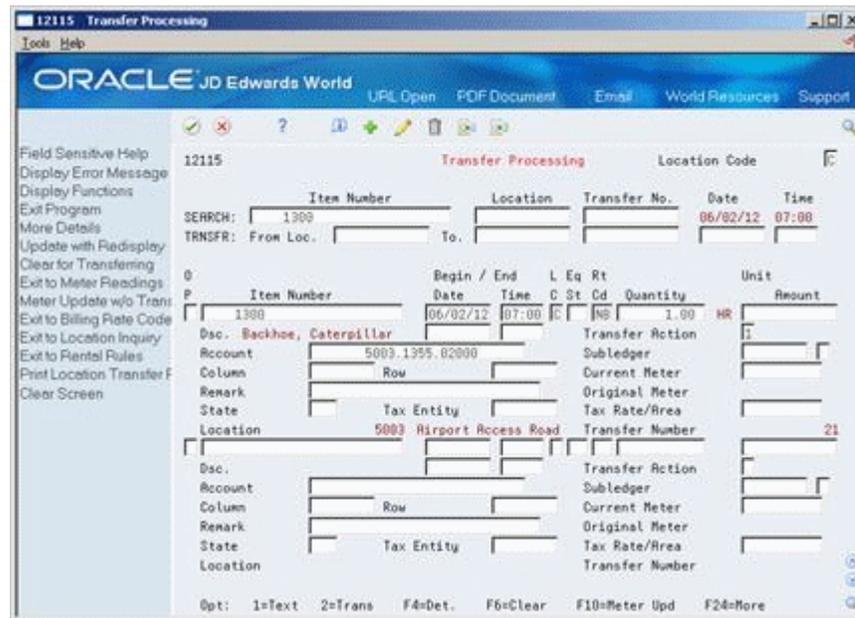
Figure 9–1 Transfer Processing screen



- Complete the following fields:
 - To (Location)

- Item Number
2. Complete the following optional fields:
 - Date
 - Time
 - From (Location)
 - Transfer Number
 - Equipment Status
 3. To enter additional location information, choose Det (Details).

Figure 9–2 Transfer Processing screen



4. Complete the following optional fields:
 - Remark
 - Current Meter
 - Column
 - Row
 - State
 - Tax Entity
 - Tax Rate/Area

To enter location information with inquiry

On Transfer Processing

1. To review the location information for specific equipment, complete any of the following search fields:
 - Item Number
 - Location

- Transfer Number
- 2. To specify the type of location information that you want to review, complete the following field:
 - Location Code
- 3. To indicate the transfer of the equipment, complete the following fields:
 - To (Location)
- 4. To enter additional location information for the equipment, complete the following optional fields:
 - From (Location)
 - Transfer Number
 - Date
 - Time
- 5. Complete the following optional fields:
 - Begin Date
 - Begin Time
 - Location Code
 - Equipment Status
 - Quantity
- 6. To enter additional location information, choose Details.
- 7. Complete the following optional fields:
 - Current Meter Reading
 - Original Meter Reading
 - Column
 - Row
 - State
 - Tax Entity
 - Tax Rate/Area
- 8. Choose Transfer for each piece of equipment that you want to relocate.
- 9. To clear any information displaying, choose F6 (Clear). The system clears the Beginning Date and Time, Ending Date and Time, Remark, and related Equipment/Plant Management billing fields.

Field	Explanation
To	The current physical location of an asset. This must be a valid business unit or job number in the Business Unit Master file (F0006).

Field	Explanation
L C	<p>A code that indicates the type of location record. You can enter the following valid values:</p> <p>C – Current. Displays only the current location for an asset.</p> <p>H – Historical. Displays all previous locations for an asset.</p> <p>P – Planned or scheduled. Displays only the planned location dates for an asset. You enter planned locations for an asset in the Equipment/Plant Management system.</p> <p>* – Displays all locations (current, planned, and historical) that meet your search criteria.</p> <p>The default value for this field is C.</p> <p>Note: You cannot change historical (type H) location records. The system automatically updates location records to type H when you change the location and start date of an asset.</p>
Transfer Number	<p>A number that identifies a transfer record for an asset or group of assets. You can assign this number to new transfer records. If you leave this field blank when you perform a location transfer, the system assigns the transfer record a number from Next Numbers.</p>
Time Stamp	<p>The time that the asset is transferred to a new location.</p> <p><i>Form-specific information</i></p> <p>If you leave the Transfer Time field and the Begin Time field blank, the system uses the beginning standard hours you set up for the job on Rental Rules.</p> <p>If you transfer an asset with location inquiry, the system automatically fills in the time in the Begin Time field from the asset's location tracking line. You can override this time. If you clear the time in this field, the system uses the time in the Transfer Time field. If you leave this field blank, the system uses the beginning standard time you set up on Rental Rules.</p>
Begin Date	<p>The date that an address, item, transaction, or table becomes active or the date from which you want transactions to display. The system uses this field depending on the program. For example, the date you enter in this field might indicate when a change of address becomes effective. Or, this date can represent a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, and so on.</p> <p><i>Form-specific information</i></p> <p>Enter the date to transfer an asset to a new location. If you transfer an asset with location inquiry, the system automatically fills in the date from the asset's location tracking line. You can override this date. If you clear the date in this field, the system uses the date in the Transfer Date field. If you leave the transfer date field blank as well, the system uses the system date.</p> <p>Note: To transfer an asset to a new current location, the beginning date must be greater than the start date of the existing current location.</p>
Current Meter	<p>The current meter reading of the piece of equipment. This field is informational only.</p>
State	<p>A user defined code system 00, type S for the state or province. This is usually a postal service abbreviation.</p>
Tax Entity	<p>The address number of the tax authority to which property taxes are paid.</p>

Field	Explanation
Tax Rate/Area	<p>A code that identifies a tax or geographic area that has common tax rates and tax distribution. The tax rate/area must be defined to include the tax authorities. For example, this field can represent a state, county, city, rapid transit district, or province, and their rates. To be valid, a code must be set up in the Tax Rate/Area table (F4008).</p> <p>Typically, U.S. sales and use taxes require multiple tax authorities per tax rate/area. VAT requires only one simple rate.</p> <p>The system uses this code to properly calculate the tax amount.</p>

9.2.1 What You Should Know About

Topic	Discussion
Location dates	<p>When you specify the dates for location information, note the following guidelines:</p> <ul style="list-style-type: none"> ■ The system will not accept location information if the relocation date is after the equipment's disposal date. ■ Any location information that you enter with a date after the system date must have a location code of P (Planned).
Multiple current locations	<p>When the equipment has multiple current locations, the Location and Start Date fields in the equipment master are blank. The system message Multiple Current Locations appears in the location description line.</p>
Updating fields in the Item Master table (F1201)	<p>When you update the location information for a piece of equipment, the system automatically updates the following fields in the Item Master table:</p> <ul style="list-style-type: none"> ■ Equipment Status ■ Location and Start Date (If the current transfer beginning date is greater than the existing location/start date, and you have only one current location) <p>In addition, you can use processing options to update the following tax-related fields in the Item Master table:</p> <ul style="list-style-type: none"> ■ State ■ Tax Entity ■ Tax Rate/Area <p>You can assign beginning location and start dates to equipment only when you create the equipment master or relocate the equipment. After you create the equipment master, you can make changes to the location and start date fields using the Transfer Processing program only.</p>
Consolidating equipment to one location	<p>The system automatically consolidates multiple current locations when you enter location information for multiple pieces of the same equipment with identical billing information. For example, if you enter location information with identical relocation dates, times, and billing information for equipment that is currently in multiple locations, the system will create one current location for the equipment.</p>

Topic	Discussion
Relocating partial quantities	When you relocate partial quantities of an equipment item, the system modifies the original location information to a history record for the full quantity. The system also creates a new current location to show the quantity that remains at the original location and a new current location for the quantity that you relocated.
Entering location information out of sequence	If you enter location information out of sequence when you record the relocation of equipment, the system issues a warning message. If you do not change the From Location field, the system sorts out the location records by date and determines whether to create a new location tracking line or update an existing location record.
Parent and component relationships	If you enter location information for equipment that is the parent of components, the system automatically relocates all components that are at the same location as the parent to the new location.
Entering and revising billing information	You can use Transfer Processing to enter or revise equipment billing information. For example, when you enter new location information, you can also revise the billing rate code or reassign equipment to a different job for billing purposes. See <i>Entering Location Information in the JD Edwards World Equipment Billing Guide</i> for more information.
Location Transfer - Z File (P12115Z) (Release A9.3 Update)	You can use the Location Transfer - Z File (P12115Z) processing program to call Transfer Processing (P12115) as a batch process and use that data instead of data you enter manually; to create the Location Tracking file (F1204) and Location History file (F1210), and update Asset Master file (F1201). See Appendix B, "Import Mass Data into Equipment Plant Maintenance" for more information.

9.2.2 Processing Options

See [Section 53.9, "Location Inquiry \(P12215\)"](#)

9.3 Reviewing Location Information

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Location Tracking**

From **Equipment Location Tracking (G1314)**, choose **Location Inquiry**

You can use Location Revisions to review and revise location tracking information for a piece of equipment. You can review current, planned, and historical location information for individual pieces of equipment, or review all information for a particular location. You can enter specific dates to limit the information that the system displays. You can also delete current and planned location information.

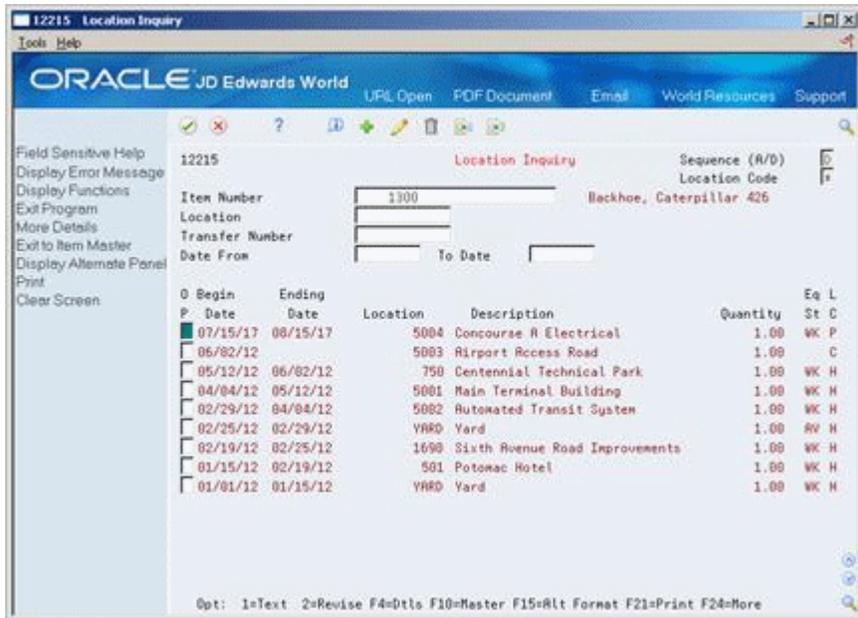
9.3.1 Before You Begin

- Verify that the equipment master includes a beginning location and start date. See [Section 9.2, "Entering Location Information"](#) for information about using Transfer Processing to update beginning location and start date fields on the equipment master.

To review location information

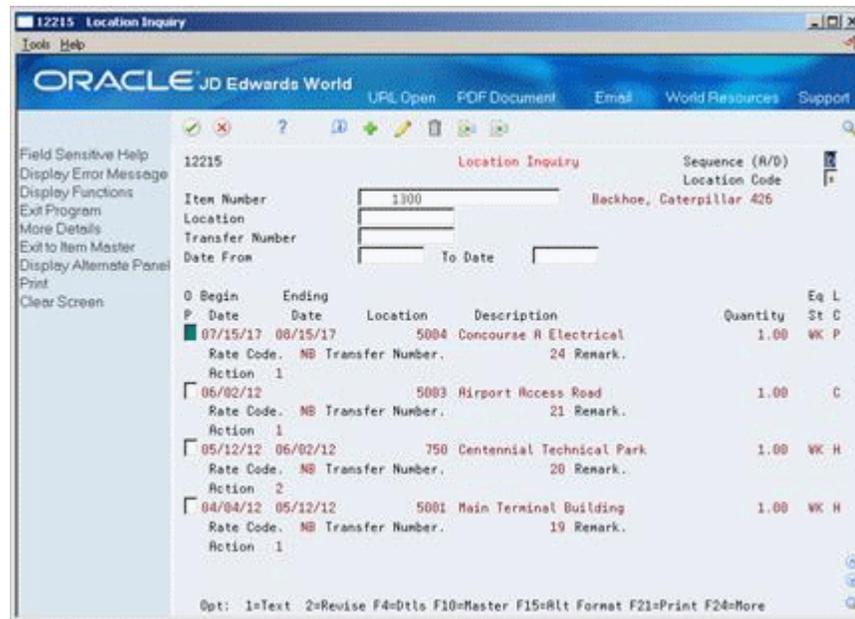
On Location Inquiry

Figure 9-3 Location Inquiry screen



1. To find location information, complete any of the following fields:
 - Equipment Number
 - Location
 - Transfer Number
2. To narrow your search, complete the following optional fields:
 - Date From
 - To Date
 - Location Code
3. To review additional information about a particular equipment location, choose Details (F4 key).

Figure 9–4 Location Inquiry screen (Details area)



9.3.2 What You Should Know About

Topic	Discussion
Alternate display formats	You can review equipment location information on Location Inquiry by equipment number or by location. Depending on the search criteria that you enter, the system displays the appropriate display format. You can toggle between formats to display location information by location or equipment number.
Location messages	If there is a text message associated with a particular location, the system highlights the Option field next to that location. Choose Text to review the message. See Section 9.4, "Revising Location Information" for more information about entering text messages.

9.3.3 Processing Options

See [Section 53.9, "Location Inquiry \(P12215\)"](#)

9.4 Revising Location Information

Navigation

From Equipment/Plant Management (G13), choose **Equipment Location Tracking**

From Equipment Location Tracking (G1314), choose **Location Inquiry**

You can make revisions to individual equipment locations. For example, you can revise the status of the equipment, meter reading information, or transfer number. You can also enter text messages for specific locations. For example, you might want to note specific instructions or explanations for a location.

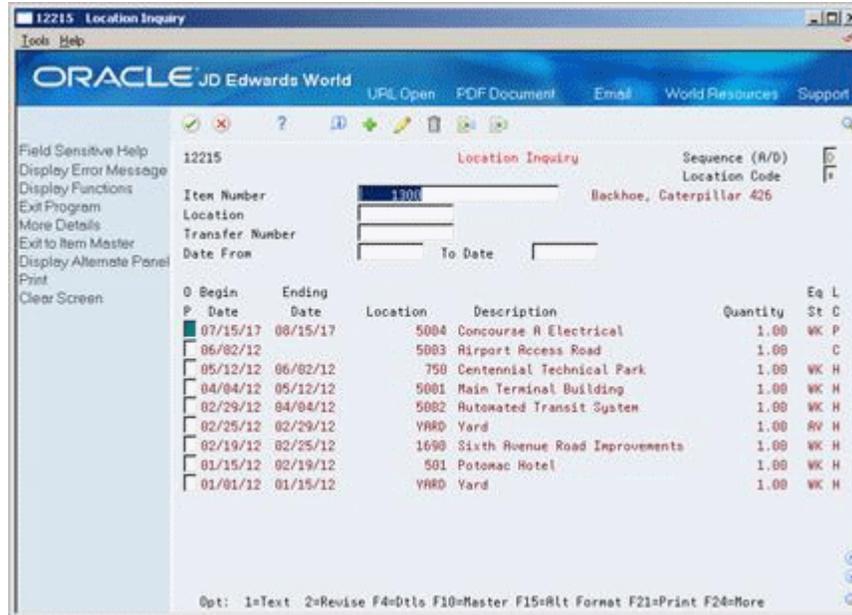
When you enter a text message for an equipment location, the system highlights the Option field next to the equipment on Location Inquiry.

If your organization uses Location Billing to bill for equipment use, the location might include location billing information. You can use Location Revisions to make changes to location billing information if you have not yet billed for the equipment. After you bill for the use of a piece of equipment, you cannot change location billing information.

To revise location information

On Location Inquiry

Figure 9–5 Location Inquiry screen



- To locate information about a specific equipment location, complete the following fields:
 - Equipment Number
 - Location
 - Transfer Number
 - Date From
 - To Date
 - Sequence
 - Location Code
- For the location information that you want to change, choose Revise.
- On Location Revisions, complete any of the following fields to revise the location information:
 - Ending Date
 - Ending Time
 - Transfer Number
 - Equipment Status
 - Remark

- Current Meter Reading
 - Original Meter Reading
 - Column
 - Row
 - State
 - Tax Entity
 - Tax Rate/Area
4. To revise location billing information, complete any of the following fields:
- Transfer Action
 - Equipment Rate Code
 - Business Unit
 - Object
 - Subsidiary
 - Subledger
 - Subledger Type
 - Billing Amount

You can revise the fields above only if you have not yet billed the equipment to the job.

5. To enter tracking text for the location, choose Text by typing a 1 in the option field to the left of the begin date.

Figure 9–6 Location Tracking Text screen

6. On Location Tracking Text, enter a message.

9.4.1 What You Should Know About

Topic	Discussion
Entering location tracking text	Choose Text to enter a text message for individual locations. For example, you might want to note specific instructions or an explanation for a transfer. When you enter a text message for equipment, the system highlights the option field next to the location on Location Inquiry.
Revising location billing information	<p>You can revise only location billing information that has not been billed. After you bill for the use of a piece of equipment, you cannot change the following fields:</p> <ul style="list-style-type: none"> ■ Transfer Action ■ Equipment Rate Code ■ Business Unit ■ Object ■ Subsidiary ■ Subledger ■ Subledger Type ■ Billing Amount
Reviewing location information on Location Revisions	<p>You can review only one equipment location at a time on Location Revisions. To locate specific location information from the Location Revisions screen, you must complete the following fields:</p> <ul style="list-style-type: none"> ■ Equipment Number ■ Location ■ Location Code ■ Beginning Date
Deleting location information	<p>Use the Location Revisions screen to delete individual location information. You can delete only planned and current locations.</p> <p>When you delete current location information, the system changes the most recent historical location back to the current location.</p> <p>You can also delete current location information for a piece of equipment, such as scaffolding, that might have more than one current location. The system deletes all the current locations with the same date and makes the prior equipment locations current.</p>
Updating fields in the Item Master table (F1201)	<p>You can use processing options to update the following tax-related fields in the Item Master table when you change them on Location Revisions:</p> <ul style="list-style-type: none"> ■ State ■ Tax Entity ■ Tax Rate/Area
Changing the location ending date and time	You can change only the ending dates and ending times for current and planned locations.

9.4.2 Processing Options

See [Section 53.9, "Location Inquiry \(P12215\)"](#)

Review Maintenance Costs

This chapter contains these topics:

- [Section 10.1, "Reviewing Maintenance Costs"](#)
- [Section 10.2, "Reviewing Equipment Costs by Cost Account"](#)
- [Section 10.3, "Reviewing Equipment Costs by Repair Code"](#)
- [Section 10.4, "Reviewing Shop Costs by Cost Account"](#)
- [Section 10.5, "Reviewing Shop Costs by Repair Code"](#)

10.1 Reviewing Maintenance Costs

To help manage costs within your maintenance organization, you can review inception-to-date, year-to-date, and month-to-date account balances for individual pieces of equipment. You can also:

- Review one subledger or all subledgers for a specific piece of equipment.
- Review detailed or summarized account balance information.
- Display equipment account balances in currency amounts or in units and per unit costs.
- Review maintenance costs by shop or job.
- Review maintenance costs by cost account or repair code.

You can review maintenance costs by cost account or repair code. When you review costs and expenses by cost account, the system displays all accounts in object account order. When you review costs by repair code, the system displays accounts in subsidiary account order, beginning with the account that you indicate.

Order	Description
Costs by cost account	<p>A cost account is an object account that typically represents a type of cost. Examples of cost accounts include:</p> <ul style="list-style-type: none"> ■ Labor ■ Parts ■ Materials <p>Review costs by cost account when you need an abbreviated income statement and balance sheet for a specific piece of equipment or shop.</p>

Order	Description
Costs by repair code	<p>A repair code is a subsidiary account that represents a subdivision of a cost account. You can use repair codes to keep detailed records of the accounting activity for a particular cost account. Examples of repair codes include:</p> <ul style="list-style-type: none"> ■ Preventive maintenance ■ Emergency repairs ■ Electrical repairs ■ Mechanical repairs <p>Review costs by repair code when you need a managerial perspective of costs related to a specific type of repair.</p>

See Also:

- [Section 13.1, "Posting G/L Journal Entries to Equipment"](#) for more information about how costs and expenses are assigned to equipment

This section contains the following:

- [Section 10.2, "Reviewing Equipment Costs by Cost Account"](#)
- [Section 10.3, "Reviewing Equipment Costs by Repair Code"](#)
- [Section 10.4, "Reviewing Shop Costs by Cost Account"](#)
- [Section 10.5, "Reviewing Shop Costs by Repair Code"](#)

10.2 Reviewing Equipment Costs by Cost Account

Navigation

From Equipment/Plant Management (G13), choose Cost Inquiries and Reports

From Cost Inquiries and Reports (G1312), choose Cost Summary by Cost Account

You can review equipment costs by cost account. When you review costs and expenses by cost account, the system displays all accounts in object account order. Each cost account, or object account, represents a type of cost. By reviewing costs by cost account, you get a financial perspective of business costs. For example, you can set up individual cost accounts for labor, parts, material, and so on. Reviewing equipment costs by cost account allows you to see the totals of each type of cost.

View costs by cost account to access:

- All account balances relating to a certain piece of equipment
- Equipment acquisition costs, depreciation amounts, revenue, maintenance expense, operating expense, and so on, for a specific period
- Abbreviated income statement and balance sheet information for a specific piece of equipment

To review equipment costs by cost account

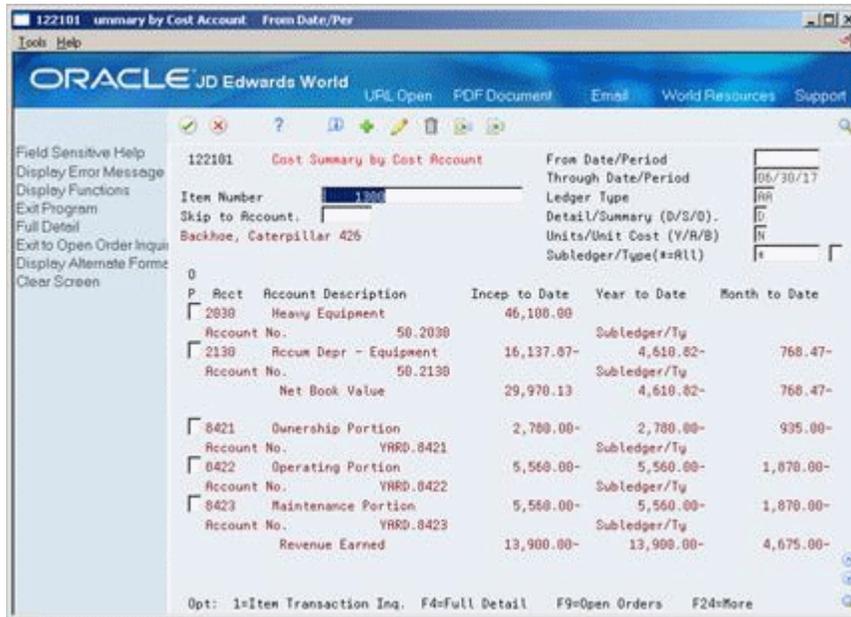
On Cost Summary by Cost Account

Figure 10-1 Cost Summary by Cost Account screen

P. Acct	Account Description	Incep to Date	Year to Date	Month to Date
2838	Heavy Equipment	46,108.00		
2130	Accum Depr - Equipment	16,137.87-	4,610.82-	768.47-
	Net Book Value	29,970.13	4,610.82-	768.47-
8421	Ownership Portion	2,780.00-	2,780.00-	935.00-
8422	Operating Portion	5,560.00-	5,560.00-	1,870.00-
8423	Maintenance Portion	5,560.00-	5,560.00-	1,870.00-
	Revenue Earned	13,900.00-	13,900.00-	4,675.00-
8441	Depreciation	4,610.82	4,610.82	768.47
	Ownership Costs	4,610.82	4,610.82	768.47
8482	Regular Time - Brake Sy	117.56	117.56	
8482	Regular Time	19.75	19.75	19.75
8486	Parts - Brake System	127.58	127.58	
	Maintenance Costs	264.81	264.81	19.75
	Total	20,945.76	13,635.19-	4,655.25-

1. Complete the following field:
 - Item Number
2. To specify the costs that you want to review, complete the following optional fields:
 - From Date/Period
 - Through Date/Period
 - Ledger Type
 - Detail/Summary (D/S/O)
 - Units/Unit Cost (Y/A/B)
 - Subledger/Type (*=All)
3. To review more information, choose Full Detail.

Figure 10–2 Cost Summary by Cost Account screen (Full Detail area)



- To review the posted transactions for an individual account balance, choose Item Transaction Inq.

Field	Explanation
Ledger Type	<p>A user defined code (system 09/type LT) that specifies the type of ledger, such as AA (Actual Amount), BA (Budget Amount), or AU (Actual Units). You can set up multiple, concurrent accounting ledgers within the general ledger to establish an audit trail for all transactions.</p> <p><i>Form-specific information</i></p> <p>The system assigns a default ledger type of AA (Actual Amounts) for this field.</p>
Detail/Summary (D/S/O)	<p>A code that determines how account information will be displayed on the screen.</p> <p>On Cost Summary by Cost Account, you can enter the following valid values:</p> <ul style="list-style-type: none"> D – No summarization O – Summarize at the object account level S – Display totals at the subtotal level (You define the subtotal level when you set up the AT range of accounts in the AAIs.) <p>On Cost Summary by Repair Code, you can enter the following valid values:</p> <ul style="list-style-type: none"> D – No summarization R – Display totals at the repair code (subsidiary) level

Field	Explanation
Units/Unit Cost (Y/A/B)	<p>A code that determines whether the system displays amounts or statistical units. You can use statistical units to track equipment information for a piece of equipment. Valid values are:</p> <p>N – Display currency amounts. This is the default value.</p> <p>Y – Display statistical units such as hours. The statistical units you define for this code are stored in the AT00 automatic accounting instruction.</p> <p>A – Display statistical units, such as those used to indicate fuel consumption. The statistical units you define for this code are stored in the FMA automatic accounting instruction.</p> <p>B – Display statistical units such as miles. The statistical units you define for this code are stored in the FMB automatic accounting instruction.</p> <p>Equipment can accumulate usage amounts based on hours, miles, fuel, and so on. When you display equipment costs by units or unit cost, the first account listed shows the number of units that have accumulated for that piece of equipment. The remaining account balances reflect actual amounts divided by the total units or a per unit cost for each account.</p>

10.2.1 Processing Options

See [Section 53.10, "Cost Summary by Account Code \(P122101\)"](#)

10.3 Reviewing Equipment Costs by Repair Code

Navigation

From Equipment/Plant Management (G13), choose Cost Inquiries and Reports

From Cost Inquiries and Reports (G1312), choose Cost Summary by Repair Code

You can review equipment costs by repair code. When you review costs by repair code, the system displays accounts in subsidiary account order, beginning with the account that you indicate.

Repair codes, or subsidiaries, represent a subdivision of cost accounts. You can use repair codes to keep detailed records of the accounting activity for a particular cost account. By reviewing costs by repair code, you get a managerial perspective of business costs. For example, you might have a cost account for labor. You can set up repair codes to track labor costs for different types of repairs, such as preventive maintenance repairs, emergency repairs, electrical repairs, mechanical repairs and so on, within the labor cost account.

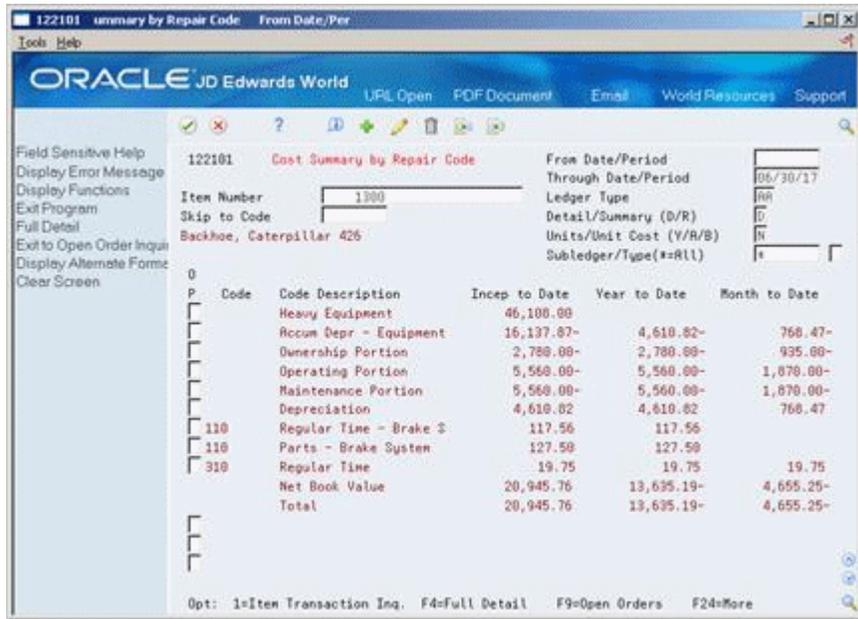
View costs by repair code to access:

- All repair costs for a particular piece of equipment
- Subsidiary accounts to review costs associated with a certain type of repair
- Object accounts, such as labor, parts, or materials specific to a particular repair code

To review equipment costs by repair code

On Cost Summary by Repair Code

Figure 10–3 Cost Summary by Repair Code screen



1. Complete the following field:
 - Item Number
2. To specify the repair codes that you want to review, complete the following optional fields:
 - From Date/Period
 - Through Date/Period
 - Ledger Type
 - Detail/Summary (D/R)
 - Units/Unit Cost (Y/R/B)
 - Subledger/Type (*=All)
3. To review the posted transactions for an individual repair code, choose Item Transaction Inq.

10.3.1 What You Should Know About

Topic	Discussion
Reviewing costs by specific repair code	Use the Skip to Code field to review account information by specific repair code, rather than by a piece of equipment.

10.3.2 Processing Options

See [Section 53.11, "Cost Summary by Repair Code \(P122101\)"](#)

10.4 Reviewing Shop Costs by Cost Account

Navigation

From Equipment/Plant Management (G13), choose Cost Inquiries and Reports

From Cost Inquiries and Reports (G1312), choose Shop Cost Inquiries by Cost Account

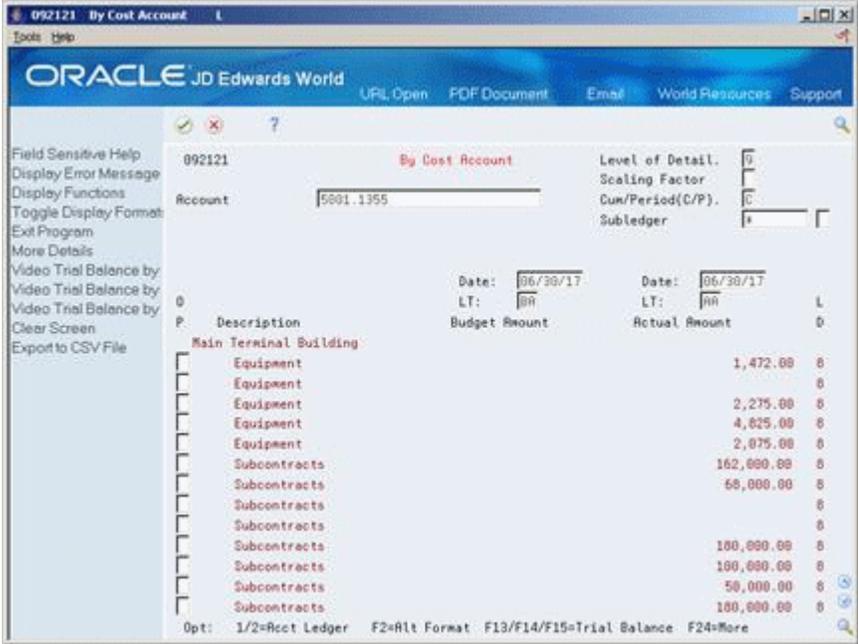
Each cost account (object account) represents a type of cost. When you review costs by cost accounts, you get a financial perspective of business costs. For example, you can set up individual cost accounts for labor, parts, materials, and so on. When you review shop costs by cost account, you see the total of each type of cost for a shop or business unit.

You can display all shop costs, and you can review cost account balances for costs, such as labor, parts, and material, for an entire shop. You can also compare actual amounts with budget amounts or amounts for any other two ledger types.

To review shop costs by cost account

On By Cost Account

Figure 10-4 By Cost Account screen



- Complete the following field:
 - Account
- To limit the information that displays, complete any of the following fields:
 - Level of Detail
 - Scaling Factor
 - Cum/Period (C/P)
 - Subledger/Type

3. To override the default values and specify different types of information to review, complete the following fields:
 - Date
 - LT (Ledger Type)

Field	Explanation
Scaling Factor	<p>A code that controls how amounts are to be rounded, that is, whether amounts are expressed in 100s, 1000s, and so on. Valid codes are:</p> <p>blank – No scaling and do not round decimals (Default) (987,654,321.91)</p> <p>0 – No scaling, but round decimals (987,654,322)</p> <p>1 – Divide by 10 and round decimals (98,765,432)</p> <p>2 – Divide by 100 and round decimals (9,876,543)</p> <p>3 – Divide by 1000 and round decimals (987,654)</p> <p>4 – Divide by 10,000 and round decimals (98,765)</p> <p>5 – Divide by 100,000 and round decimals (9,877)</p> <p>6 – Divide by 1,000,000 and round decimals (988)</p> <p>Note: The number in parentheses shows how the number 987,654,321.91 is displayed using the scaling factor. Total fields show actual amounts that are divided and decimals rounded to the nearest whole number using the 5/4 rounding rule.</p>

10.4.1 What You Should Know About

Topic	Discussion
Alternate display formats	In addition to a two-column format that displays period and cumulative amounts for specific ledger types, you can specify a three-column or four-column format. The three-column format includes period or cumulative amounts for the ledger types that you specify, and a derivative of those amounts. The four-column format lists both cumulative and period amounts for each ledger type that you specify.

10.4.2 Processing Options

See [Section 53.12, "Account Balance Comparison \(P092121\)"](#)

10.5 Reviewing Shop Costs by Repair Code

Navigation

From Equipment/Plant Management (G13), choose Cost Inquiries and Reports

From Cost Inquiries and Reports (G1312), choose By Repair Code

Review shop costs by repair code when you need to review costs for a particular repair code. Repair codes (subsidiaries) represent a subdivision of cost accounts. You can use repair codes to keep detailed records of the accounting activity for a cost account. For example, for a particular cost account, such as labor, you might need to compare electrical repair costs to costs associated with mechanical repairs.

You can display up to four user-defined columns of information related to the accounts for a single shop or business unit, or more than one business unit that you group as a project. You can review the following types of information:

- Actual amounts and unit quantities
- Budget amounts and unit quantities
- Actual values from the AA or AU ledger for the number of days prior to the date that you specify

To review shop costs by repair code

On By Repair Code

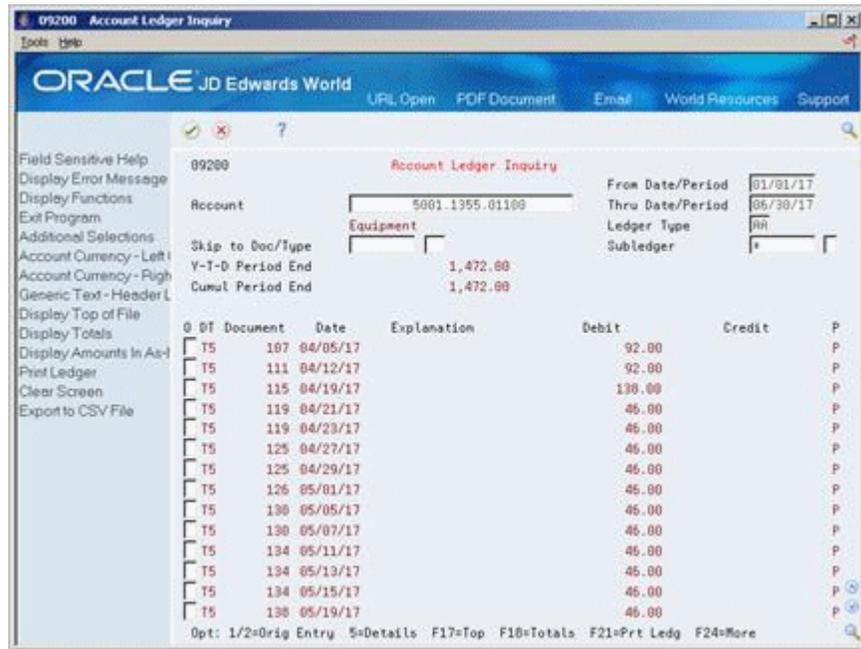
Figure 10–5 By Repair Code screen

Account	Description	Budget Amount	Actual Amount	Variance Amount
	GENERAL REQUIREMENTS			
	Job Supervision			
	Labor			
	Regular		5,888	5,888
	Burden		2,077	2,077
	Labor		7,965	7,965
	Equipment		1,472	1,472
	Job Supervision		9,437	9,437
	Project Sign			
	Materials		5,393	5,393
	Project Sign		5,393	5,393
	GENERAL REQUIREMENTS		14,831	14,831
	SITE WORK			

1. Complete the following field:
 - Job Number
2. To limit the information that displays, complete any of the following fields:
 - Thru Date/Period
 - Subledger/Type
 - Display From Cost Code
 - Display Thru Cost Code
 - Display From Type
 - Display Thru Type
 - Display From Cat Cd (Category Code)
 - Display Thru Cat Cd (Category Code)
 - LOD (Level of Detail)
 - Seq (Sequence)

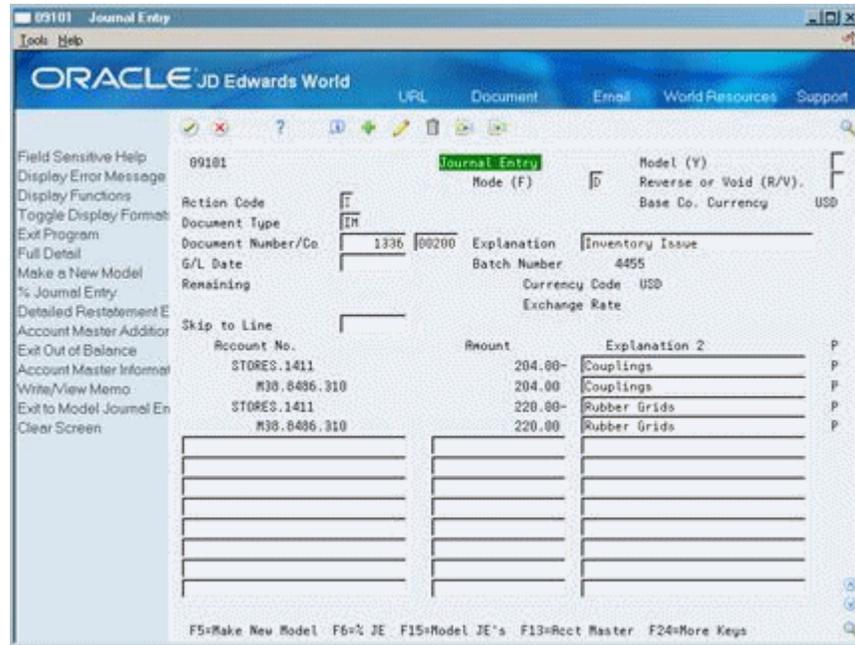
- Act (Activity)
 - P/C/I (Period/Cumulative/Inception-to-Date)
 - Proj (Project)
 - Days
3. To review account ledger information for individual entries, choose Audit.

Figure 10–6 Account Ledger Inquiry screen



4. To review individual journal entries, choose Original Entry. The Journal Entries screen displays.

Figure 10-7 Journal Entry screen



Field	Explanation
Skip To Cost Code	The cost code of the first account in the range of accounts you want displayed. <i>Form-specific information</i> For Equipment/Plant Maintenance users, the cost code is the repair code. Repair codes are set up as subsidiary accounts.
Display From Type	The cost type of the first account in the range of accounts you want displayed.
Skip To Category Code	The category code of the first account you want displayed.
LOD (Level of Display)	A number that summarizes and classifies accounts in the general ledger. You can have up to 9 levels of detail. Level 9 is the most detailed and 1 the least detailed. Example: 3 – Assets, Liabilities, Revenues, Expenses 4 – Current Assets, Fixed Assets, Current Liabilities, and so on 5 – Cash, Accounts Receivable, Inventories, Salaries, and so on 6 – Petty Cash, Cash in Banks, Trade Accounts Receivable, and so on 7 – Petty Cash - Dallas, Petty Cash - Houston, and so on 8 – More Detail 9 – More Detail Levels 1 and 2 are reserved for company and business unit totals. When using the Job Cost system, Levels 8 and 9 are reserved for job cost posting accounts.

Field	Explanation
Seq (Sequence0)	<p>Controls the sequence of the accounts that are displayed.</p> <p>Valid codes are:</p> <p>blank – Cost code and cost type</p> <p>1 – Category code 01</p> <p>2 – Category code 02</p> <p>3 – Category code 03</p> <p>A – Alternate cost code</p> <p>This field also controls whether you can enter codes in the range-related fields for category codes and alternate cost codes.</p>
Act (Activity Option)	<p>Limits the display of accounts to a specific condition. This field includes or excludes information from the Account Master (F0901) and Account Balances tables (F0902) based on prior and current activity. The description of the condition is displayed on the left side of the screen above the account information.</p> <p>Note: The screen displays header accounts related to the detail accounts that meet the condition in the Act field. This is true even if a header account does not seem to meet the same condition.</p>
Proj (Project Level Inquiry)	<p>Use this field to indicate whether you are inquiring on a single job or on a project that includes multiple jobs.</p> <p>1 – Indicates that you are inquiring on a project number. The information displayed is a consolidation of all of the jobs for the project number.</p> <p>0 – Indicates that you are inquiring on a single job. The information displayed is only for the job number you enter.</p> <p>blank – Indicates the same as entering 0.</p>

10.5.1 What You Should Know About

Topic	Discussion
User defined columns and alternative formats	<p>You can set up different formats for the By Repair Code screen that meet your specific business needs. You can also change the format of the screen interactively. As long as the search criteria that you enter in the header portion of the screen remains the same, the system searches only once on the related tables and ledgers. If you change one or more columns, or toggle to a new format, the system automatically recalculates the information to satisfy the different columns.</p>

See Also:

- [Section 35.4.1, "Defining Inquiry Columns"](#) for more information about setting up the user-defined columns that you can use when reviewing shop costs.

10.5.2 Processing Options

See [Section 55.6, "Job Status Inquiry \(P512000\)"](#)

Process G/L to Equipment

This chapter contains these topics:

- [Section 11.1, "Objectives"](#)
- [Section 11.2, "About Processing G/L Journal Entries to Equipment"](#)

11.1 Objectives

- To understand how costs and expenses are incorporated into Equipment/Plant Maintenance
- To revise G/L journal entries before they are posted to equipment
- To split G/L journal entries
- To post G/L journal entries to equipment

11.2 About Processing G/L Journal Entries to Equipment

You can enter equipment costs through any JD Edwards World system that creates journal entries for business transactions in the Account Ledger table (F0911). These systems include:

- Accounts Payable
- General Accounting
- Inventory

The system identifies the journal entries that affect equipment based on the fixed asset range of accounts that you set up in the automatic accounting instructions (AAIs). Accounts that fall within the FX range of the AAIs include:

- Maintenance expense accounts
- Operating expense accounts
- Statistical accounts
- Equipment revenue accounts

After the system creates journal entries for the equipment costs that you enter, you must post the entries first to the general ledger, and then to equipment. When you post to the general ledger, the system updates the Account Balances table (F0902). When you post to equipment, the system updates the Item Balances table (F1202). You can post journal entries to equipment, or you can set up your system to post the journal entries to equipment when you post the entries to the general ledger.

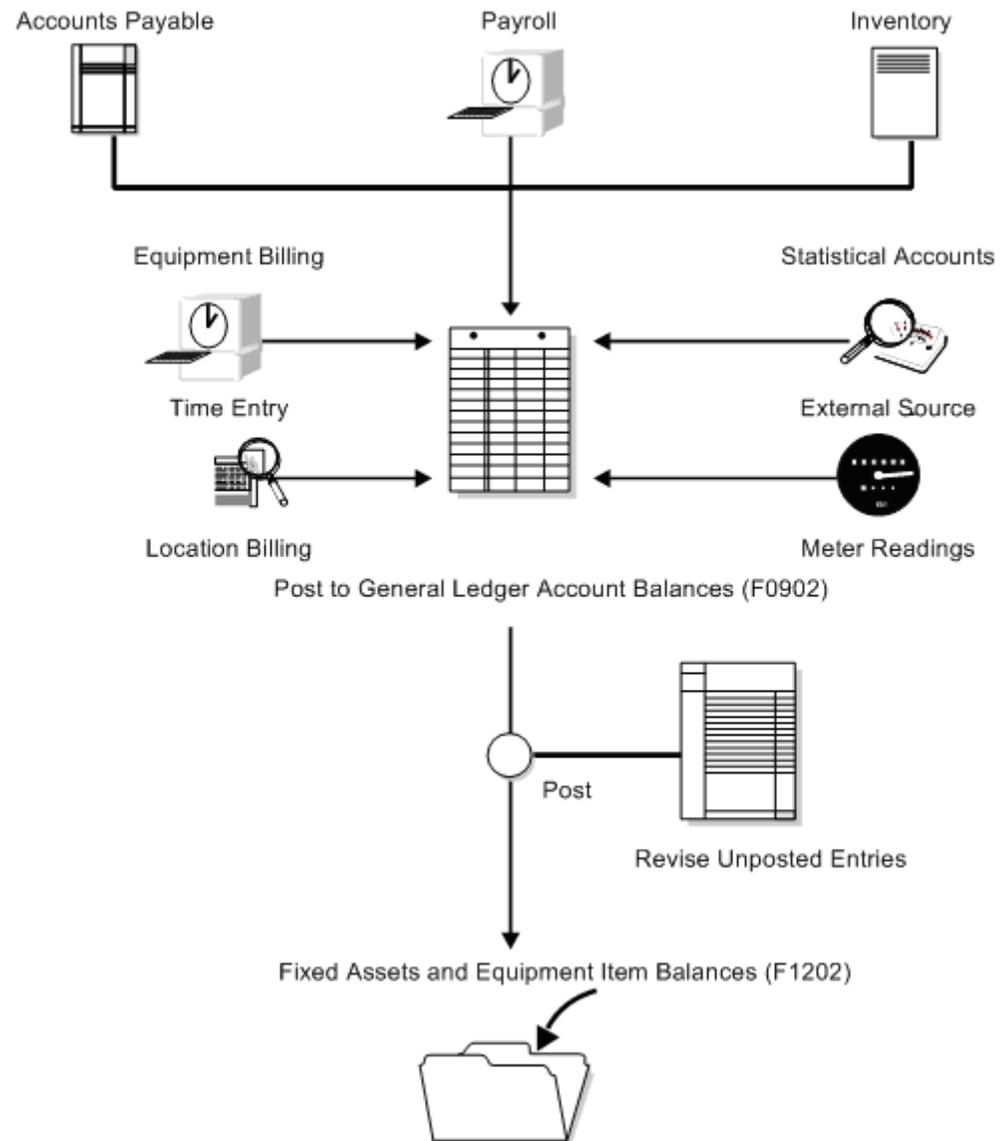
Before posting journal entries to equipment, the system verifies that each entry includes the following:

- A general ledger post code of P, which means the journal entry has been posted to the Account Balances table (F0902)
- An account that falls within the cost account range set up in the FX range of automatic accounting instructions (AAIs)
- A fixed asset post code of blank to indicate that the system can post the journal entry to the Item Balances table (F1202)
- A valid equipment number
- A hold code of blank

When you post journal entries to equipment, the system updates the Item Balances table and marks each transaction as posted.

The following graphic shows the type of journal entries that affect equipment costs, and how those entries are assigned to equipment.

Figure 11-1 How Journal Entry Types that Affect Equipment Costs are Assigned to Equipment



type of journal entries that affect equipment costs, and how those entries are assigned to equipment.

Processing general ledger journal entries to equipment consists of the following tasks:

- Working with G/L journal entries
- Posting G/L journal entries to equipment

Work with G/L Journal Entries

This chapter contains these topics:

- [Section 12.1, "Working with G/L Journal Entries"](#)
- [Section 12.2, "Revising Unposted Journal Entries"](#)
- [Section 12.3, "Splitting Unposted Journal Entries"](#)
- [Section 12.4, "Printing the Journal Entries Report"](#)

12.1 Working with G/L Journal Entries

You can revise equipment journal entries that have been posted to the general ledger but not to equipment. For example, you might want to review journal entries to ensure that all of the equipment information is included, such as equipment numbers. You also work with G/L journal entries to prevent any transactions that are within the fixed asset (FX) range of AAIs from posting to equipment. For example, you might want to prevent transactions that you record to make corrections to the general ledger from posting to equipment.

12.2 Revising Unposted Journal Entries

Navigation

From Fixed Assets (G12), choose Posting G/L to Fixed Assets

From Posting G/L to Fixed Assets (G1212), choose Revise Unposted Entries

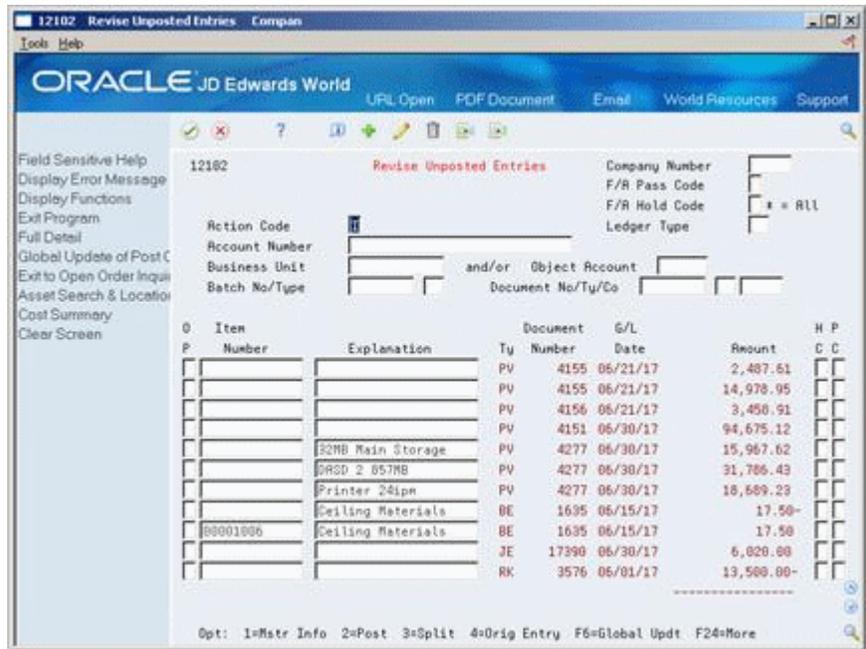
Use Revise Unposted Entries to make specific changes to journal entries before they are posted to equipment. For example, you can:

- Revise or add an equipment number to a journal entry.
- Revise or add a description to further explain a journal entry.
- Create an equipment master for journal entries that include an asset cost account for a piece of equipment that is new to the system.
- Revise the hold or pass code on a journal entry to temporarily or permanently prevent it from posting to equipment.
- Post individual journal entries immediately (interactively) to equipment rather than in a batch job.

Note: To ensure the integrity of your transaction records and audit trails, the system prevents changes to account information that has already been posted to the general ledger.

- G/L account number
- Amount
- G/L date

Figure 12–1 Revise Unposted Entries screen



To revise unposted journal entries

On Revise Unposted Entries

1. To locate a journal entry, complete any of the following fields:
 - Company
 - Account Number
 - Business Unit
 - Object Account
 - Batch No/ Type
 - Document No/Type/Co
 - F/A Hold Code
 - Ledger type
2. To immediately post individual journal entries to equipment, choose Post.
3. To change or add a transaction description, complete the following field:
 - Explanation

4. To change the hold code for a transaction, complete the following field:
 - Hold Code
5. To prevent a transaction from posting, complete the following field:
 - F/A Pass Code
6. To automatically create a new equipment master when you run Post G/L Entries to equipment, leave the following field blank:
 - Equipment Number
7. To create a new equipment master or review an existing equipment master, choose Master Information.

Field	Explanation
F/A Hold Code	<p>This hold code is used in conjunction with the F/A system. Only those records with a "batch rear end" value of blank, G/L post code of P and hold code value of blank will be selected in the Post Unposted F/A Entries program.</p> <p>If there are records that have been posted to G/L, but should not be posted to F/A, you can update this hold code to any character other than X or *. The X code is reserved for F/A Time Entry. The * code is reserved for selection of all hold codes in Revise Unposted Entries (P12102).</p>
F/A Pass Code	<p>Enter a value in this field to locate specific transactions. Transactions with an asterisk (*) in this field have already been posted to fixed assets. These transactions do not appear on Revise Unposted Entries. To view all fixed asset transactions, regardless of post code, enter @ in this field.</p> <p>The valid post codes for fixed asset transactions are as follows:</p> <p>blank – Unposted</p> <p>Transaction has not yet been posted to the Item Balances table (F1202)</p> <p>P – Pass</p> <p>Transaction does not fall within the FX range of accounts as set up in AAIs, and will not post to fixed assets. You can manually update this field to P through the Revise Unposted Entries program (P12102). Use P in this field when the account number is within the fixed asset range of accounts, but you do not want the transaction to post to fixed assets.</p>

Field	Explanation
Asset Number-Input	<p>An identification code for an asset that you can enter in one of the following formats:</p> <ul style="list-style-type: none"> 1 – Item number (a computer-assigned, 8-digit, numeric control number) 2 – Unit number (a 12-character alphanumeric field) 3 – Serial number (a 25-character alphanumeric field) <p>Every asset has an item number. You can use unit number and serial number to further identify assets as needed.</p> <p>If this is a data entry field, the first character you enter indicates whether you are entering the primary (default) format that is defined for your system, or one of the other two formats. A special character (such as "/" or "*") in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats on the Fixed Assets system constants screen.</p> <p><i>Form-specific information</i></p> <p>If you leave this field blank and the account falls within the cost account (FA) range in the AAIs, the system automatically creates a new asset master record when you run the batch Fixed Asset Post.</p>

12.2.1 Processing Options

See [Section 53.13, "Revise Unposted Entries \(P12102\)"](#)

12.3 Splitting Unposted Journal Entries

Navigation

From **Fixed Assets (G12)**, choose **Posting G/L to Fixed Assets**

From **Posting G/L to Fixed Assets (G1212)**, choose **Revise Unposted Entries**

You can use Revise Unposted Entries to split a journal entry into two or more entries before you post to equipment. For example, you might split unposted journal entries when an accounts payable invoice for multiple pieces of equipment is distributed to one account, but you need to capitalize each piece separately.

For example, an invoice for computers can be distributed in the full amount to the G/L asset account for computers. However, you might want to capitalize each computer separately in equipment. You can split the original journal entry for computers into several pieces of equipment, such as central processing unit, printer, monitor, and keyboard.

After you split a journal entry, you can review the transactions on Revise Unposted Entries.

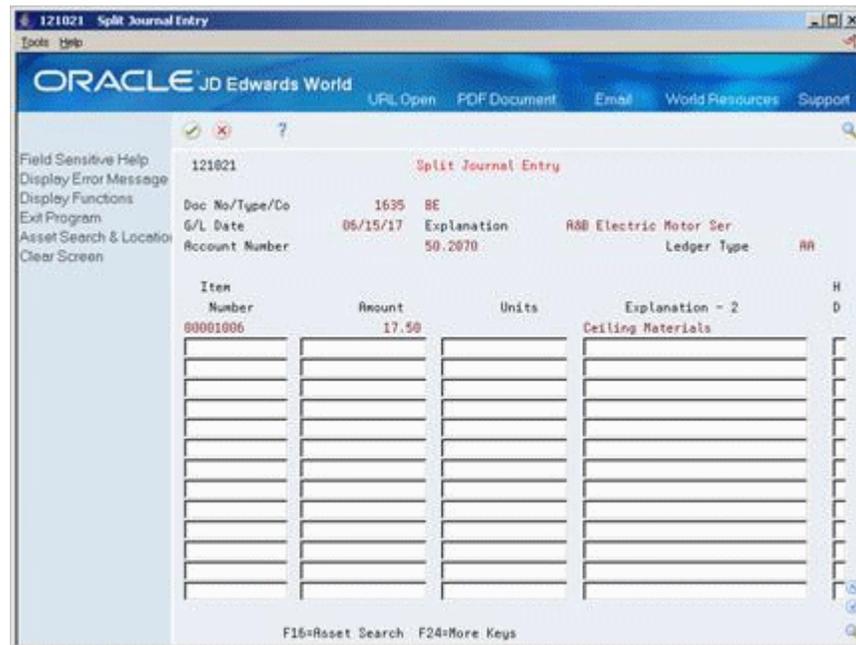
To split unposted journal entries

On Revise Unposted Entries

1. To locate a journal entry, complete any of the following fields:
 - Company Number
 - Account Number
 - Business Unit

- Object Account
 - Batch No/Type
 - Document No/Ty/Co
 - F/A Hold Code
 - Ledger Type
2. Enter C in the following field:
 - Action Code
 3. Choose Split.

Figure 12–2 Split Journal Entry screen



4. On Split Journal Entry, complete the following fields:
 - Item Number
 - Amount
 - Units (if applicable)
 - Explanation - 2

Field	Explanation
Explanation - 2	<p>A name or remark that describes an element in the JD Edwards World systems.</p> <p><i>Form-specific information</i></p> <p>Enter a remark to describe the journal entry split. If you leave this field blank, the system uses the description of the original journal entry as the default value.</p>

12.3.1 What You Should Know About

Topic	Discussion
Splitting a portion of a journal entry	You cannot split a portion of a journal entry. When you split a G/L journal entry into two or more entries, the new totals must add up to the total amount of the original journal entry.

See Also:

- [Section 12.2, "Revising Unposted Journal Entries"](#) for the processing options for this program

12.4 Printing the Journal Entries Report

Navigation

From Fixed Assets (G12), choose Posting G/L to Fixed Assets

From Posting G/L to Fixed Assets (G1212), choose Print Journal Entries

You can print the Unposted Fixed Asset Transactions report to view a list of all transactions that have been posted to the general ledger but not to equipment. The FX range identifies the beginning and ending range of asset accounts that can post to equipment. The Unposted Fixed Asset Transactions report is a printed version of Revise Unposted Entries.

Figure 12–3 Unposted F/A Transactions report

Do Document Ty Number		G/L Date	Account, Description, Subledger/Type	LT	Amount	Units	Item Number	Description/Explanation	Line Number	H D
12301 JD Edwards World Unposted F/A Transactions Page - 2 Date - 6/30/17										
PV	538	06/15/98	50.2070. Capital Improvements	AA	2,000.00			* No Item Master Record Electrical Units	6.0	H
PV	568	06/15/98	50.2040. Vehicles	AA	8,925.64			A&B Electric Motor Ser * No Item Master Record Invoice 79860	13.0	
PV	568	06/15/98	50.2040. Vehicles	AA	4,000.00			Tenco Tractor, Inc. * No Item Master Record Invoice 821347 Tenco Tractor, Inc.	14.0	H
A Model Construction Mgmt Co					14,925.64					
					14,925.64					

12.4.1 What You Should Know About

Topic	Discussion
Viewing the results of an interactive post	Journal entries that you post interactively to the general ledger do not appear on the Unposted Fixed Asset Transactions report. You must view interactive post results online.
Report messages	When you post a journal entry that does not include an equipment number, the No Item Master Record message appears on the report. You should create an equipment master for the equipment and attach the new equipment number to the journal entry.

12.4.2 Processing Options

See [Section 53.14, "Unposted F/A Transactions \(P12301\)"](#).

Post G/L Journal Entries to Equipment

This chapter contains these topics:

- [Section 13.1, "Posting G/L Journal Entries to Equipment"](#)
- [Section 13.2, "Posting a Batch of Journal Entries"](#)
- [Section 13.3, "Verifying the Post Process"](#)

13.1 Posting G/L Journal Entries to Equipment

After you verify the information in the unposted equipment journal entries, you must post the entries to the Item Balances table (F1202). All journal entries that are within the fixed asset (FX) range of AAIs must be posted to the Item Balances table to update the Equipment/Plant Management system with current transaction records.

13.2 Posting a Batch of Journal Entries

Navigation

From Fixed Assets (G12), choose Posting G/L to Fixed Assets

From Posting G/L to Fixed Assets (G1212), choose Post G/L Entries to Assets

Before G/L journal entries can be posted to equipment, the system verifies that each entry includes:

- A G/L post code of P (posted to the Account Ledger table)
- An account that is within the FX range you set up in the AAIs
- A fixed asset post code of blank
- A valid equipment number or an account that is within the cost account (FA) range of the AAIs
- A hold code of blank

When you run the Post G/L Entries to Assets program, the system posts all equipment journal entries to the Item Balances table. The post program updates the Item Balances table and marks each transaction as posted.

13.2.1 Processing Options

See [Section 53.15, "Post Unposted F/A Entries \(P12800\)"](#)

13.3 Verifying the Post Process

After the post process is complete, the system generates a Post Unposted Fixed Asset Entries report. You can review this report to verify the results of the post. The report indicates all journal entries that were not posted and why. It also notes any automatic processes that might have occurred during the post.

Three messages can appear in the Message Area column on this report:

Message	Description
Item Master Record Created	<p>This message indicates that the system created an equipment master and its corresponding balance record for a posted transaction. If you do not create these records for a piece of equipment before you run the post program, the system automatically creates them under the following circumstances:</p> <ul style="list-style-type: none"> ■ The equipment number is blank in the Account Ledger table (F0911). ■ The object account is within the FA range of AAI's. ■ You use the Post G/L Entries to Assets program to run the post. <p>The system creates equipment masters and balance records based on the values that you enter in Item Setup Default Coding.</p>
Item Number Assigned	<p>If you did not assign an equipment number to an unposted journal entry, this message indicates that the system has automatically assigned an equipment number based on the FA range in the AAI's.</p>
Unable to Post-The record is not in the Item Master Table	<p>This message indicates that you did not assign an equipment number to an unposted journal entry and the system was unable to assign a number automatically.</p>

Figure 13-1 Post Unposted F/A Entries report

12800		JD Edwards World				Page 2	
		Post Unposted F/A Entries				Date 6/15/17	
Do Document Ty Number	G/L Date	Account Description and Explanation	LT	Amount	Item Number Units	Description	Message Area
FV 572	06/15/98	50.2030. Heavy Equipment Trailer Tenco Tractor, Inc.	AA	19,785.60	10663 Heavy Equipment Tenco Tractor, Inc. Trailer	Item Master record created. Item number assigned.	
FV 573	06/15/98	50.2030. Heavy Equipment Tractor Digger, Inc.	AA	675,795.80	10671 Heavy Equipment Digger, Inc. Tractor	Item Master record created. Item number assigned.	
FV 574	06/15/98	50.2030. Heavy Equipment Steel Platform Edwards & Edwards	AA	25,782.55	10680 Heavy Equipment Edwards & Edwards Steel Platform	Item Master record created. Item number assigned.	

You can also verify the results of the post to equipment online. To review posted equipment transactions and the effects of the post on other account information, access the following forms:

Form	Description
Equipment Search and Location	Review new equipment and corresponding equipment masters that are generated by the post. This is useful if you split a general ledger transaction before running Post G/L Entries to Assets.
Cost Summary	Review how the new transactions affect cost accounts and balances.

Form	Description
Assembly Components and NBV	Review how parent and component relationships are affected by the post. You can also see any changes to the net book value of any piece of equipment.

See Also:

- [Section 13.2, "Posting a Batch of Journal Entries"](#) for the processing options for this report

Part II

Preventive Maintenance Cycle

This part contains these chapters:

- [Chapter 14, "Overview to Preventive Maintenance Cycle"](#)
- [Chapter 15, "Create a PM Schedule"](#)
- [Chapter 16, "Work with Meter Readings"](#)
- [Chapter 17, "Update PM Schedule Information"](#)
- [Chapter 18, "Change the Status of PMs to Complete"](#)

Overview to Preventive Maintenance Cycle

This chapter contains these topics:

- [Section 14.1, "Objectives"](#)
- [Section 14.2, "About the Preventive Maintenance Cycle"](#)
- [Section 14.3, "Terms and Concepts"](#)

14.1 Objectives

- To understand the process of events in a typical preventive maintenance cycle
- To set up preventive maintenance (PM) schedules for equipment
- To update PM schedules with current equipment information
- To track completed maintenance tasks

14.2 About the Preventive Maintenance Cycle

Use Equipment/Plant Maintenance to plan, monitor, and complete routine maintenance operations. When you use Equipment/Plant Maintenance, you can minimize equipment breakdowns and unscheduled repairs.

When you use Equipment/Plant Maintenance to manage your equipment maintenance needs, you define the type and frequency of each maintenance task for each piece of equipment in your organization. The preventive maintenance cycle refers to the sequence of events that make up a maintenance task, from its definition to its completion. Since most preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.

The preventive maintenance cycle consists of the following tasks:

- Creating a PM schedule
- Working with meter readings
- Updating PM schedule information
- Changing the status of PMs to complete

14.2.1 Before You Begin

- Create equipment masters for all pieces of equipment that you want to maintain. See [Section 3, "Create an Equipment Master"](#)

14.3 Terms and Concepts

You should be familiar with the following terms and concepts related to the preventive maintenance cycle:

Term	Description
Service type	<p>You define service types to describe individual preventive maintenance tasks. You can define as many service types as you need. You can set up service types to apply to a particular piece of equipment or a class of equipment. Examples of service types include:</p> <ul style="list-style-type: none"> ■ 250-hour inspection ■ Clutch adjustment ■ Lubricate ventilation fan ■ 10,000-hour engine rebuild
Preventive maintenance schedule	<p>You create one preventive maintenance schedule for each piece of equipment for which you want to perform PMs. The PM schedule defines which service types should apply to a piece of equipment. The PM schedule also defines the service interval for each service type. A service interval refers to the frequency at which the service types will be performed.</p> <p>For example, you could create a PM schedule for a piece of equipment that schedules a belt inspection every 5,000 hours, and a mandatory belt replacement every 20,000 hours.</p>
PM	<p>A PM refers to one or more service types that are scheduled to be performed for a piece of equipment. You typically specify that a PM be performed at a predefined point in time. The point in time can be based on days, date, or when a piece of equipment accumulates a predefined number of statistical units, such as hours, miles, and so on. You identify how many units have accumulated for each piece of equipment by periodically entering equipment meter readings.</p>
PM status	<p>When the system creates a record for a PM, it assigns an initial status of 01 (Maintenance Task Defined). You define other statuses to indicate the particular steps that a PM goes through before it is completed.</p> <p>When you complete a PM, the system assigns it a status of 99 (Maintenance Complete).</p>

Although the level of complexity of the preventive maintenance cycle differs from company to company, a typical preventive maintenance cycle includes the following procedures:

- Creating PM schedules for each piece of equipment
- Scheduling PMs
- Completing PMs

14.3.1 Creating PM Schedules for Each Piece of Equipment

When you create a PM schedule, you include the service types that the equipment requires and the intervals at which the service types must be performed.

14.3.2 Scheduling PMs

You schedule maintenance by periodically updating PM schedule information. When you update PM schedule information, the system determines which service types are due to be performed, based on meter readings, dates, and other user defined criteria. If service types are due to be performed, the system updates the PM status. In addition, depending on how you set up your system, the system generates a PM work order.

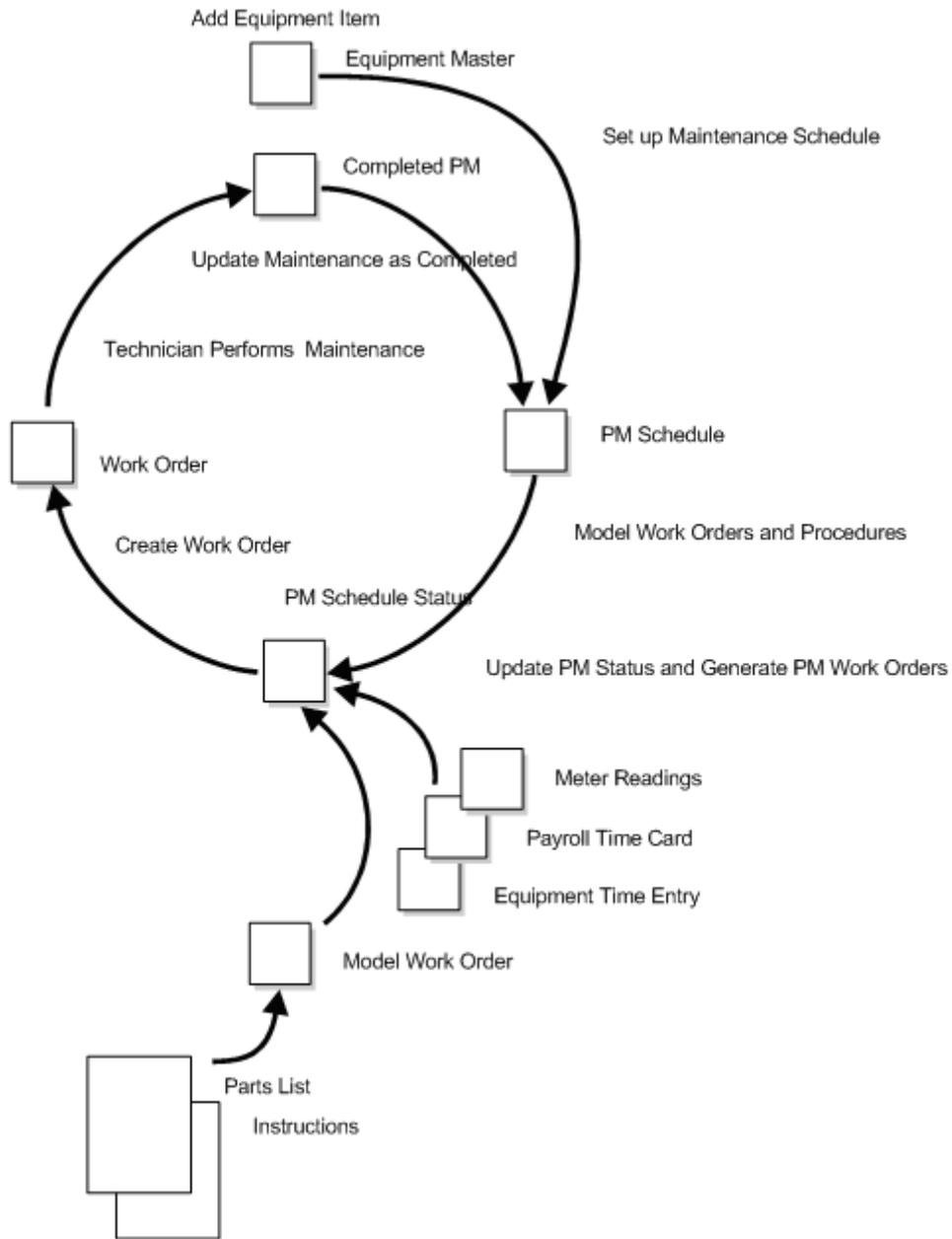
14.3.3 Completing PMs

You indicate when maintenance has been performed by completing PMs and PM work orders. When you complete a PM, the system creates a historical record of it. For most service types other than warranty service types, the system then generates a new PM based on statistical information that you gather when you perform the maintenance. The system does not generate a new PM for warranty service types.

14.3.4 Preventive Maintenance Cycle

The following graphic shows the progression of events in a typical maintenance cycle.

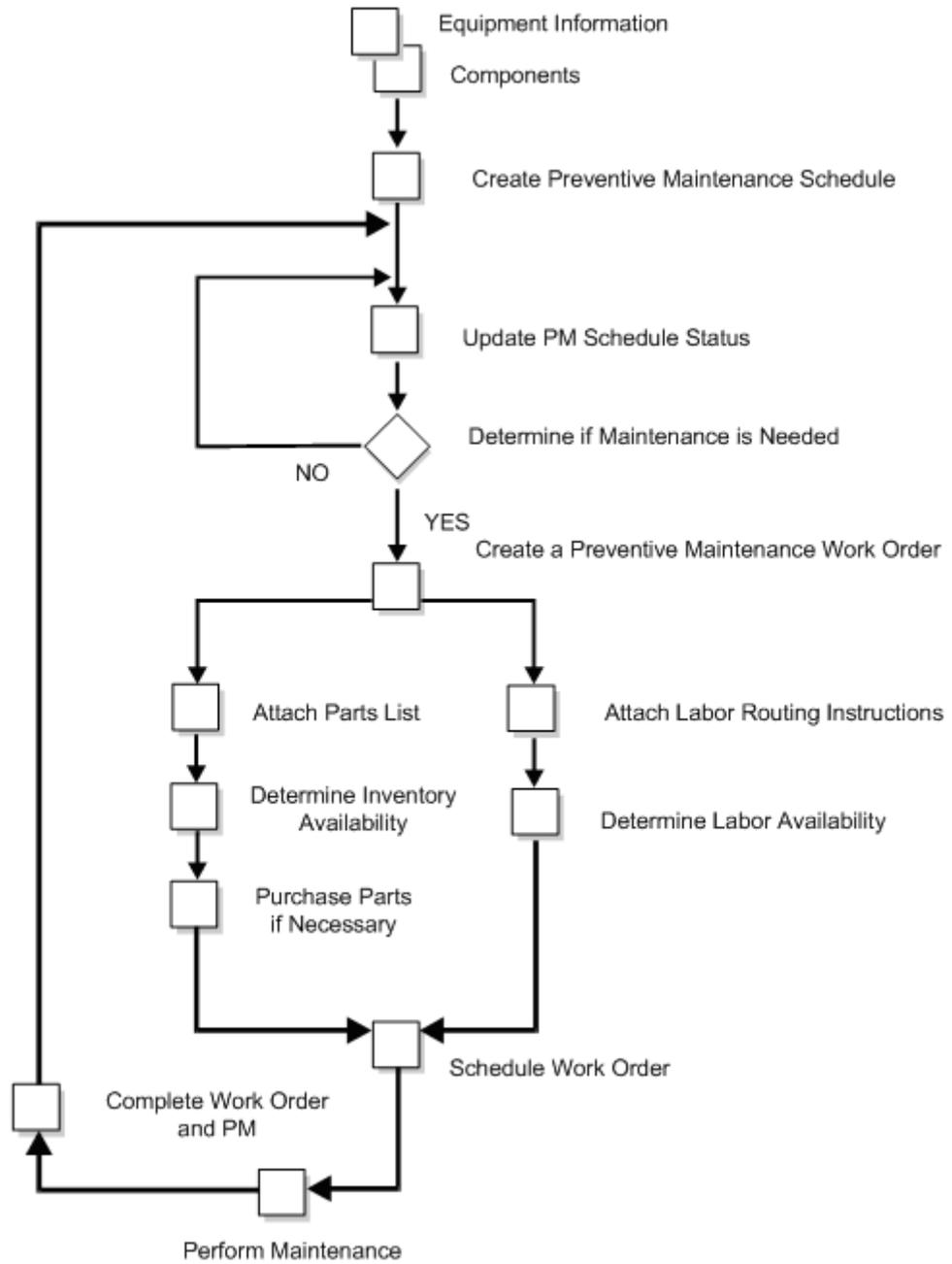
Figure 14-1 Progression of Events in a Typical Maintenance Cycle



14.3.5 Preventive Maintenance Process Flow

The following graphic shows the progression of a typical preventive maintenance process.

Figure 14-2 Progression of Events in a Typical Preventive Maintenance Process



Create a PM Schedule

This chapter contains these topics:

- [Section 15.1, "Creating a PM Schedule"](#)
- [Section 15.2, "Creating an Item PM Schedule"](#)
- [Section 15.3, "Linking Service Types"](#)
- [Section 15.4, "Creating a Maintenance Loop"](#)
- [Section 15.5, "Creating a Model PM Schedule"](#)
- [Section 15.6, "Creating a Model Work Order"](#)

15.1 Creating a PM Schedule

You create a PM schedule for each piece of equipment that you want to maintain. On each PM schedule, you indicate all of the service types you want to associate with the piece of equipment. You also specify the rules governing how and when the service types are performed. In addition, you can use PM schedules to signal warranty expirations, equipment messages, such as warnings and problem reports, and other planning events not necessarily associated with preventive maintenance tasks.

You can link related service types to a primary service type. When you link service types, the system determines if separate maintenance tasks can be performed concurrently based on rules that you set up.

You can set up maintenance loops by a specific PM service type. A maintenance loop links a particular routine maintenance task, such as a weekly inspection, to a group of equipment for which the maintenance task applies. For example, you can create a PM schedule to perform a weekly lubrication for one lathe on a production line, and set up a maintenance loop to inspect all other lathes on the line.

Create a model PM schedule to streamline maintenance scheduling for similar pieces of equipment. When you add a piece of equipment to your maintenance organization, the system uses values from the model PM schedule to create a PM schedule for the equipment. In addition, you can create model work orders with default values that the system uses when it generates new work orders for PMs.

You can schedule PMs to be performed based on:

- A specific date
- A specified interval of days since maintenance was last performed
- Statistical units based on employee usage, such as employee hours
- Statistical units based on meter readings, such as miles, fuel, cycles, and so on

- Information supplied by an external predictive maintenance system

This section contains the following:

- [Section 15.1, "Creating a PM Schedule"](#)
- [Section 15.3, "Linking Service Types"](#)
- [Section 15.4, "Creating a Maintenance Loop"](#)
- [Section 15.5, "Creating a Model PM Schedule"](#)
- [Section 15.6, "Creating a Model Work Order"](#)

15.2 Creating an Item PM Schedule

Navigation

From Equipment/Plant Management (G13), choose Equipment/Plant Maintenance

From Equipment/Plant Maintenance (G1315), choose Item PM Schedule

You create a PM schedule for each piece of equipment that you want to maintain. On each PM schedule, you indicate all of the service types that you want to associate with the piece of equipment. You also specify the rules governing how and when the service types are performed. In addition, you can use PM schedules and service types to signal warranty service, equipment messages, such as warnings and problem reports, and other planning events not necessarily associated with preventive maintenance tasks.

15.2.1 Before You Begin

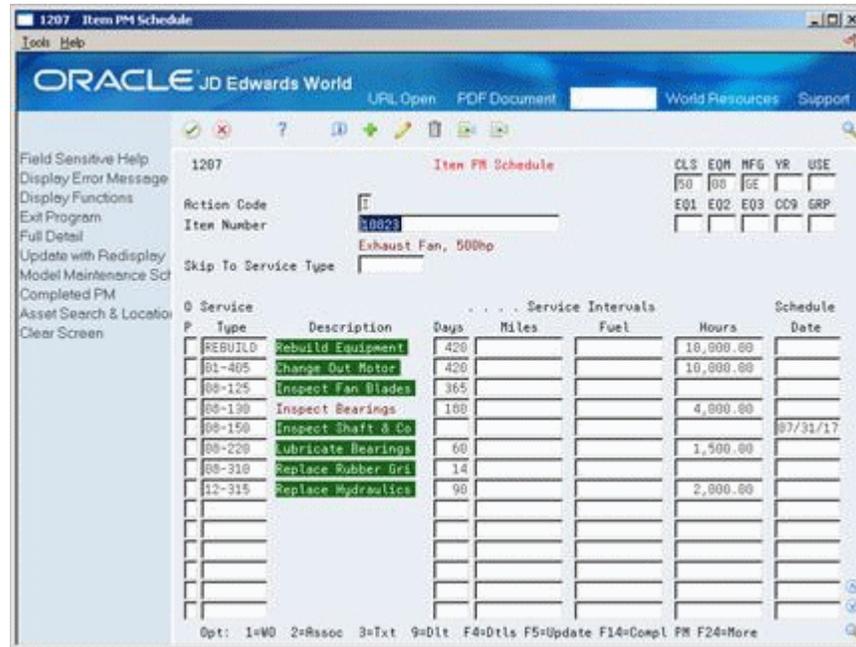
Set up the following user defined code tables:

- Service types
- Maintenance priority codes
- Maintenance procedure codes
- Equipment category codes 1 - 10, if you use model PMs

To create an item PM schedule

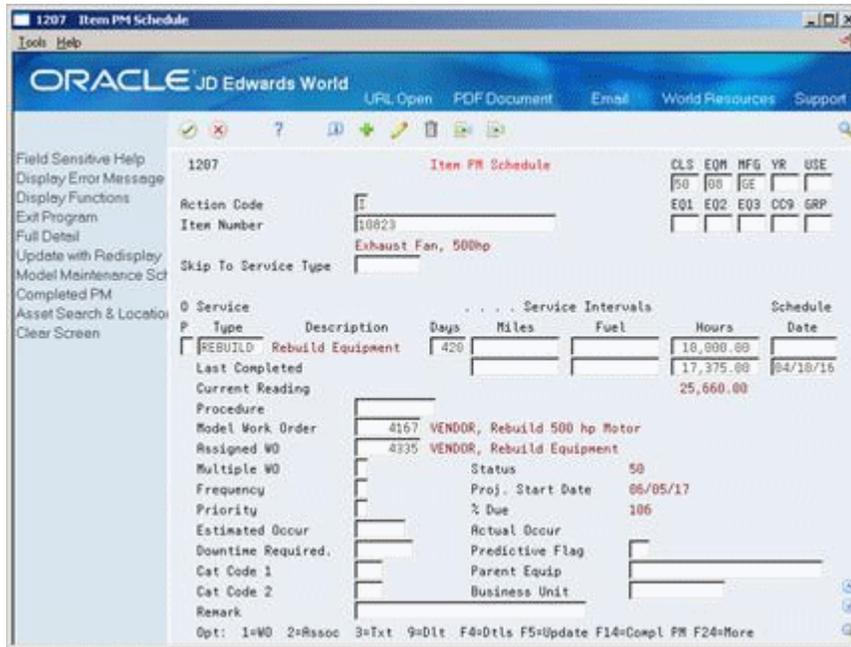
On Item PM Schedule

Figure 15–1 Item PM Schedule screen



1. Complete the following fields:
 - Item Number
 - Skip To Service Type
2. For each service type that you enter, complete the following optional field:
 - Schedule Date
3. If you did not enter a schedule date, complete any of the following Service Interval fields for each service type:
 - Days
 - Miles
 - Fuel
 - Hours
4. Choose Dtls.

Figure 15–2 Item PM Schedule screen (Details area)



5. If you use model work orders, complete the following field:
 - Model Work Order
6. If the maintenance task for the piece of equipment has been performed but this is the first PM to be applied to the equipment, complete the following optional fields on the Last Completed line:
 - Miles
 - Fuel
 - Hours
 - Schedule Date
7. Complete the following optional fields:
 - Multiple WO
 - Frequency
 - Priority
 - Estimated Occur
 - Predictive Flag
 - Cat Code 1
 - Cat Code 2
 - Remark

Field	Explanation
Skip To Service Type	A user defined code (system 12, type ST) that describes the preventive maintenance service to be performed. Examples of codes include CLUTCH for adjust clutch, OIL for change oil, 10H for 10 hour service, and so forth.

Field	Explanation
Service Intervals Schedule Date	<p>The date that you want to receive a reminder message about an asset.</p> <p><i>Form-specific information</i></p> <p>This is the future date on which the scheduled maintenance is due. You can enter a service interval based on the schedule date and service days.</p>
Service Intervals Days	<p>The number of days to elapse before you schedule maintenance.</p> <p><i>Form-specific information</i></p> <p>You can enter a service interval based on service days and schedule date.</p>
Frequency	<p>When used in conjunction with Schedule Date, this field indicates the frequency at which the system schedules maintenance. When maintenance is completed, the system automatically schedules the next maintenance according to the value that you enter in this field. Valid values are:</p> <p>blank – No frequency indicator</p> <p>1 – Same date each month</p> <p>2 – Last date each month</p> <p>3 – Same date each quarter</p> <p>4 – Same date each year</p> <p>5 – Same day each week</p> <p>6 – Semi-annually (same date at six month intervals)</p>
Multiple WO	<p>This code determines whether maintenance service types can be rescheduled and come due again before maintenance for the originally scheduled service type has been completed. Valid codes are:</p> <p>blank – One Cycle (default). Maintenance will not be rescheduled until the original maintenance task has been completed.</p> <p>1 – Multiple Cycle with Multiple Work Orders. Once maintenance has come due, the maintenance task is automatically rescheduled so that it can come due again without completing the original maintenance. Multiple work orders can also accrue.</p> <p>2 – Multiple Cycle. The same as 1 above but only one work order will accrue.</p> <p>3 – Maintenance Loop. This is a system-generated code associated with maintenance loops. The Update PM Schedule program assigns this code to PM schedules generated through maintenance loops. These PM schedules are not repeated in the PM cycle. Maintenance tasks for the associated equipment indicated in the maintenance loop are performed under one work order.</p> <p>4 – Warranty. This code indicates that the equipment is under warranty. The system provides a warning on the following screens: Work Order Entry, Work Order Inventory Issues, and Purchase Request (when called from the Work Order Parts List).</p>
Priority	<p>This field is used to indicate the relative priority that this maintenance has in relation to all other maintenance.</p>

Field	Explanation
Predictive Flag	A user defined code that determines if service is due. This field can be updated based on information from a third party predictive maintenance system.
Proj Start Date	The Projected Start Date is controlled by processing option 7C in Update PM Schedule Status (P12807). The system will only project a start date for a PM or work order if this processing option is populated with a "1", and the Update PM Schedule Status (P12807) program has been run against a PM that has had at least one completion posted against it. You must also leave processing options 7A and 7B blank, as these options are to be used separately.

15.2.2 What You Should Know About

Topic	Discussion
Creating PM schedules for similar equipment	<p>Use the PM Schedule Global Update program to create PM schedules based on service type and equipment category codes. This is especially useful if you have a large quantity of similar equipment for which you need to create PMs.</p> <p>See Chapter 15, "Create a PM Schedule" for more information about creating PMs using the PM Schedule Global Update program.</p>
Equipment under warranty	<p>You can indicate warranty tasks for a piece of equipment by entering a 4 in the Multiple Work Order field for each warranty service type. When a PM that includes warranty service types is completed, the system includes the warranty service in the PM history record, but does not reschedule the warranty service types in the new PM cycle.</p>
Unscheduled service	<p>When you have service types that are not associated with scheduled intervals or a schedule date, you can set up a service type without including a service interval. For example, you can set up a service type to wash the piece of equipment on an as-needed basis or repair the equipment at the point of failure. Use Backlog Management or Equipment Backlog to notify the system to create an unscheduled maintenance work order when you want to perform the maintenance task.</p> <p>When you set up a service type for unscheduled maintenance, you must include a model work order number.</p> <p>See Chapter 20, "Create Corrective Work Orders" for information about creating work orders for unscheduled maintenance.</p>
Model work order procedures	<p>If you enter both a model work order number with its own procedure and a procedure for a service type, the system displays a warning message. The message indicates that the work order might have its own procedure that could conflict with the procedure you entered.</p>
Predictive maintenance	<p>You can use a third party predictive maintenance system to update the Predictive Flag field. Any value in this field other than blank triggers the system to:</p> <ul style="list-style-type: none"> ■ Update the service type to a maintenance-due status ■ Create a PM work order for the service type

Topic	Discussion
Schedule date and service intervals	<p>You use the schedule date to force the PM to be due on a specific date. For example, if a plant shutdown will occur 12/31/17, you can enter this date in the Schedule Date field. The service interval is not used in conjunction with this field, and if you enter both the service interval and the schedule date, the system will give an error message. If you use the schedule date, the Frequency field can be utilized to reschedule the PM once the service is complete.</p>
Estimated occurrences	<p>You can enter the number of occurrences per year that a service type will likely be performed by completing the Estimated Occurrences field. The system uses this value, in combination with the last completed date, to project future PMs. You can also use processing options to automatically calculate the estimated occurrences, based on one of the following:</p> <ul style="list-style-type: none"> ■ One year of PM history ■ Two years of PM history ■ Inception to date PM history
Using a combination of hours (units) and days	<p>If you are using a combination of hours and days, the system will schedule the PM when the first interval becomes due.</p> <p>If a PM is setup as due 500 Hours or 45 Days, the system will schedule the PM for the interval that comes due first. If 45 Days have passed, the system will schedule the PM even if only 200 Hours of usage have occurred.</p>
Overriding a service interval	<p>You can specify that any service type be performed immediately by choosing the Create Work Order option for the service type. When you choose this option, the system indicates that the service type is 100% due, and generates a work order for the service type.</p> <p>When you change the status of the work order to complete, you can specify the date that the system uses as a completion date for the PM. This is especially useful if you perform maintenance on a piece of equipment but postpone entering the information into the system until a later date.</p> <p>When the system generates a work order, it also runs the Update PM Schedule Status program. You can use processing options to specify which version of Update PM Schedule Status that you want the system to use.</p> <p>See Section 23.3.1, "Updating the Life Cycle Information of a Work Order" for more information about overriding the completion date of a PM.</p> <p>See Chapter 43, "Update PM Schedule Information" for more information about the Update PM Schedule Status program.</p>
Work order activity rules	<p>The rules must be setup for WM type work orders, as the system is setup to always use document type 'WM' for PM system generated work orders.</p>

Topic	Discussion
Calculating the PM-Projected Start Date	<p>In many cases you may want the ability to project the start date of a PM Schedule and corrective work order. This is based on a piece of equipment's service history and when the last time service was completed on the equipment. The system will calculate the projected start date using the following calculation:</p> $\text{Current Meter Reading} / 365 \text{ Days} = \text{AVG Per Day Service Interval Amount} / \text{AVG Per Day} = \text{Total Days Until Next Service}$ $\text{Total Days Until Next Service} + \text{Last Completed Date} = \text{Projected Start Date}$ <p>To project a start date for an Assigned Work Order you must populate the model work order field with a valid model work order number in the Item PM Schedule.</p> <p>Run the Update PM Schedule Status program P12807, making sure that processing option 7C is populated with a "1".</p> <p>Before You Begin:</p> <ul style="list-style-type: none"> ■ Set up your Equipment Master (P1201) ■ Set up your Item PM Schedule (P1207) ■ Set up your Model Work Order (P48011)
Updating the PM Schedule Status	<p>The P12807 program updates the PM Schedule Status and is run after there has been a change in your meter readings. After making a net increase in your meter readings (P12120), you can now run the P12807 again. Make sure you have the correct Through Date selection in processing option 1 of Update PM Schedule Status (P12807). Enter a "1" in option 7c, and Data Select on your item number.</p> <p>Note: The P12807 will calculate the Service Intervals Miles, Fuel, and Hours using the formula listed above for the project start date. To calculate the Service Interval Days, the P12807 adds the amount of days entered in the field to the last completed date.</p>

15.3 Linking Service Types

Navigation

From Equipment/Plant Management (G13), choose Equipment/Plant Maintenance

From Equipment/Plant Maintenance (G1315), choose Item PM Schedule

For each piece of equipment that you maintain, you can link several related service types to a primary service type. For example, for a particular piece of equipment, you might set up the following:

- A primary service type for a 1000-hour inspection
- A linked service type for a 500-hour inspection

When the primary service type is scheduled to be performed, the linked service types will be scheduled at the same time. This reduces equipment downtime and the possibility of performing unnecessary maintenance.

You use threshold percentages to specify when the system should include the maintenance tasks for linked service types when it schedules the primary service type. A threshold percentage is the percentage of a service interval that you define as the trigger for maintenance to be scheduled. For example, you might set up a service type

to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.

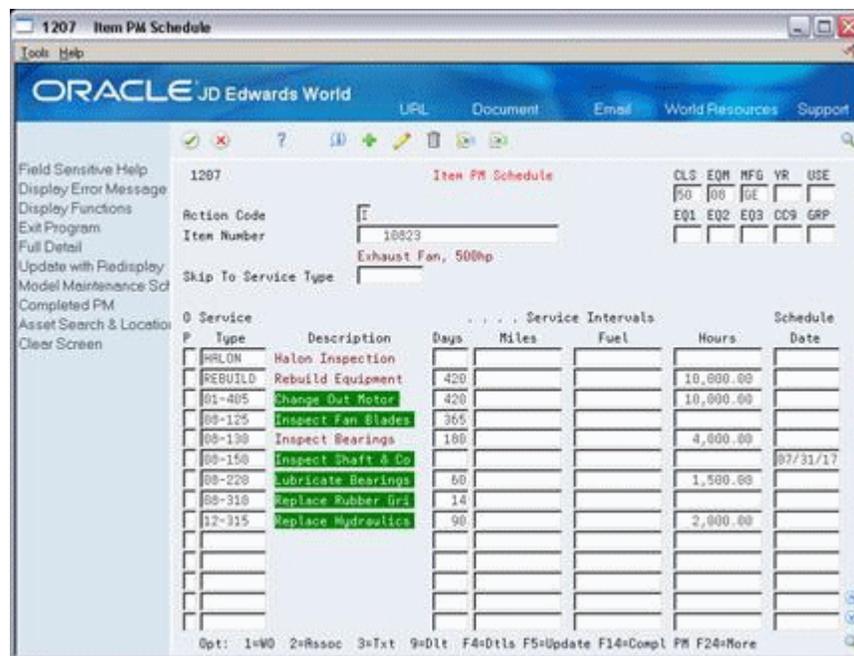
The system schedules the related maintenance to be performed with the primary maintenance if the equipment is within the threshold percentage you specify. If the system has already scheduled the PMs for the linked service types when the primary service type is due to be scheduled, the system might cancel the work orders or process them normally, depending on the current status of the PMs and the maintenance rules that you define for the primary service type.

You can specify whether the system creates a separate work order for each linked service type, or combines maintenance tasks for all linked service types into the work order for the primary service type. You can also specify how the system processes work orders that the system creates for linked service types that have been scheduled before the primary service type. For example, if the system has already created a work order for a linked service type when the primary service type becomes due, you can specify the status that the system assigns to the existing work orders, such as complete or canceled.

To link service types

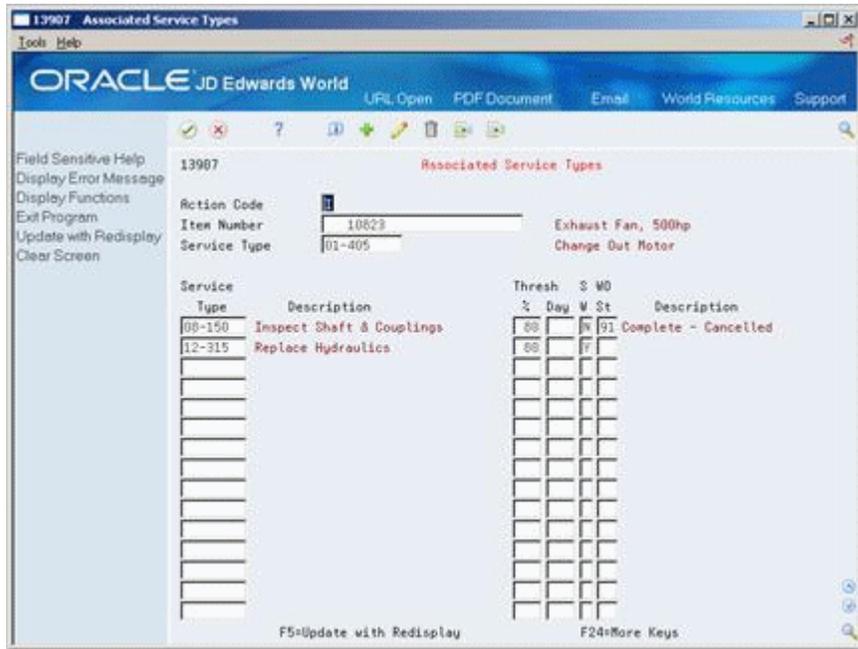
On Item PM Schedule

Figure 15–3 Item PM Schedule screen



1. Complete the following field:
 - Item Number
2. Choose Assoc.

Figure 15-4 Associated Service Types screen



3. On Associated Service Types, complete the following for each associated service type on a separate line in the following field:
 - Service Type
 - Thresh (Threshold) %
 - Thresh Day(s)
 - SW (Separate Work Order)
 - WO St

Note: Complete the Work Order Status field only if you entered either a 2, 3, or N in the SW field.

Field	Explanation
Thresh	<p>A percentage measure that indicates how close a piece of equipment is to needing maintenance. This percentage is based on the greater of the actual date, miles, hours, or fuel consumption. A percentage of 090 indicates that the piece of equipment is 10% away from needing maintenance. A percentage greater than 100 indicates that maintenance is past due.</p> <p>Note: Miles, hours, and fuel are only examples of statistical units. You can define other statistical units appropriate to your organization within the Equipment/Plant Management automatic accounting instructions.</p>

Field	Explanation
Days	<p>A daily measure of how close an equipment maintenance line item is to being eligible for being performed, taking into account the greater of the actual date, miles, hours, or fuel consumption compared to the threshold date, miles, hours, or fuel consumption.</p> <p>Note: Miles, hours, and fuel are only examples of statistical units. You can define other statistical units appropriate to your organization within the Equipment/Plant Management automatic accounting instructions.</p>
S W (Separate Work Order)	<p>A code which determines whether a separate work order will be used when grouping maintenance tasks together.</p> <p>1 – The maintenance for separate tasks will be done under separate work orders.</p> <p>2 – The maintenance for separate tasks will be done under one work order or the maintenance for one task will render the maintenance for the other tasks unnecessary. If you are combining work orders, the system will assign a canceled work order status to any outstanding work order. For example, if you combine work orders for a 250-hour service and a 500-hour service, the system will assign a cancelled work order status to the work order for the 250-hour service.</p> <p>3 – The maintenance for separate tasks will be done under one work order. The parts lists and routings from model work orders will also be combined onto one work order.</p> <p>Note: You can enter Y for 1 or N for 2.</p>

See Also:

- [Section 37.3, "Setting Up Maintenance Rules"](#)

15.4 Creating a Maintenance Loop

Navigation

From Equipment/Plant Management (G13), choose Equipment/Plant Maintenance

From Equipment/Plant Maintenance (G1315), choose Item PM Schedule

Create a maintenance loop when you need to perform identical routine maintenance tasks, such as equipment inspections on multiple pieces of equipment.

When you use maintenance loops, you eliminate the need for separate work orders for each piece of equipment that you inspect. For example, if you have 25 pumps of similar style and configuration for which you perform a routine inspection every week, you can:

- Set up a PM service type to perform a weekly inspection for one pump.
- Apply the other pumps to the PM for the first pump.

When the service type for the weekly inspection comes due, the system generates a PM for each pump, but generates only one work order for the original pump. When the system creates a work order for a maintenance loop PM, it stores the associated equipment in the work order record type that you specify in equipment constants.

The system only recycles the original PM. It does not recycle the PMs for the associated equipment.

15.4.2 What You Should Know About

Topic	Discussion
Completing work orders for maintenance loops	<p>You can complete the work order for a maintenance loop by accessing the work order directly from Backlog Management or by using PM History and Completion.</p> <p>When you complete the work order, the system indicates a completed status for all pieces of equipment included in the maintenance loop. Use this method when you have completed the maintenance task for all pieces of equipment.</p> <p>See Section 23.1, "Working with Work Orders" for more information about completing work orders using Backlog Management.</p> <p>When you complete the work order using PM History and Completion, you can specify the pieces of equipment for which you want to indicate a status of complete. Use this method if you have completed the maintenance task for some of the equipment in the loop, but do not want to indicate a status of complete for other equipment. For example, a piece of equipment scheduled for inspection might not be available on the date of the inspection.</p> <p>See Section 18.1, "Changing the Status of PMs to Complete" for more information about completing PMs.</p>
Equipment items and loops	<p>A specific equipment master record can be set up to track loops. The PM Schedule will be entered for this virtual equipment item. All of the costs will be recorded against this equipment master record, but a detailed PM history will be recorded for each equipment item in the loop.</p>

15.5 Creating a Model PM Schedule

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment/Plant Maintenance**

From **Equipment/Plant Maintenance (G1315)**, choose **Item PM Schedule**

Create a model PM schedule to store PM schedule information that you want to apply to multiple pieces of equipment with identical category codes. When you need to create PM schedules for equipment with identical category codes, you can use the model PM schedule to save data entry time.

The system stores model PM schedules in a separate table, which it accesses when you apply a particular model to a specific piece of equipment. After you apply a model PM schedule to a piece of equipment, you can modify the PM schedule to satisfy any unique maintenance requirements of that equipment.

Creating a model PM schedule consists of the following tasks:

- Setting up a model PM schedule
- Applying a model PM schedule to a piece of equipment

To set up a model PM schedule

On **Item PM Schedule**

1. Complete any combination of equipment category codes for which you want the model to apply.

Caution: Do not enter an Item number.

2. For each service type you want to include, complete the following field:
 - Service Type
3. For each service type you enter, complete the following optional field:
 - Schedule Date
4. If you did not enter a schedule date, complete any of the following optional service interval fields for each service type:
 - Days
 - Miles
 - Fuel
 - Hours
5. Choose Dtls.
6. If you use model work orders, complete the following field:
 - Model WO Number
7. Complete the following optional fields:
 - Multiple WO
 - Frequency
 - Priority
 - Estimated Occur
 - Predictive Flag
 - Cat Code 1
 - Cat Code 2
 - Remark

To apply a model PM schedule to a piece of equipment

On Item PM Schedule

1. Complete the following field:
 - Item Number
2. Enter I in the following field:
 - Action Code
3. Choose Model Maintenance Schedule.

The system searches for a model PM schedule with category codes that match the equipment specified. When the system locates a model, it automatically enters service types and scheduling information on the Item PM Schedule based on values from the model.

15.5.1 What You Should Know About

Topic	Discussion
Revising information from a model PM schedule	You can revise any of the fields on Item PM Schedule that the system entered from a model PM schedule. However, you can only revise the value in the Multiple Work Order field when the status of the PM is 01.

15.6 Creating a Model Work Order

Navigation

From Equipment/Plant Management (G13), choose Equipment/Plant Maintenance
 From Equipment/Plant Maintenance (G1315), choose Item PM Schedule

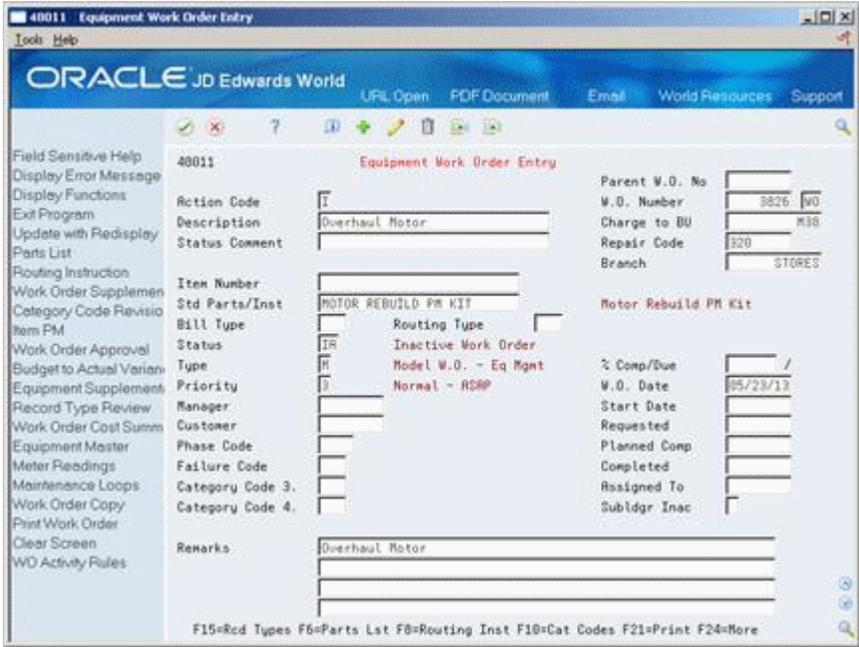
You can create model work orders for any service type on a PM schedule. When you create a model work order, the system assigns it a unique number. Depending on how you set processing options on Update PM Schedule Status, the system automatically generates a new work order based on the model each time the service type comes due.

To create a model work order

On Item PM Schedule

1. Choose WO for each service type line that you want to create a model work order.

Figure 15-6 Equipment Work Order Entry screen



2. On Equipment Work Order Entry, complete the steps to create a work order. Write down the work order number.
3. To return to the Item PM Schedule, choose Exit.
4. On Item PM Schedule, choose Dtls.
5. Complete the following field for each service type:

- Model Work Order Number

15.6.1 What You Should Know About

Topic	Discussion
Assigning equipment numbers to model work orders	You do not need to enter an item number on the model work order. The system automatically assigns the item number from the PM schedule for which the work order applies.
Using an existing work order as a model	You can use any existing work order as a model work order.

See Also:

- [Chapter 20, "Create Corrective Work Orders"](#) for more information about creating work orders
- [Chapter 43, "Update PM Schedule Information"](#) for more information about generating work orders based on models

15.6.2 Processing Options

See [Section 54.1, "Item PM Schedule \(P1207\)"](#)

Work with Meter Readings

This chapter contains these topics:

- [Section 16.1, "Working with Meter Readings"](#)
- [Section 16.2, "Entering Meter Readings"](#)
- [Section 16.3, "Working with Meter Estimates"](#)
- [Section 16.4, "Reviewing Meter Readings"](#)

16.1 Working with Meter Readings

Work with meter readings when you need to enter and update meter information about your equipment. You use meter readings to monitor equipment use and trigger maintenance tasks based on accumulated statistical units, such as miles. For example, you can specify that maintenance for a machine or piece of equipment be scheduled based on mileage, elapsed time (hours), fuel consumption, cycles, tonnage, and so on. You can define as many accounts for statistical units as you need. However, you can use only three types of statistical units to trigger maintenance. You determine the statistical units you want to use.

In addition, you can set up meter estimates and update meters for equipment for which the usage is consistent and predictable, such as assembly line machinery that runs the same number of hours or produces the same number of parts in each production cycle. You can also review the meter readings for any piece of equipment.

16.2 Entering Meter Readings

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

From Equipment Information (G1311), choose Meter Readings

You can enter meter readings in either of two ways:

- Enter meter readings for a piece of equipment
- Enter meter readings for multiple pieces of equipment

Enter and update meter readings for individual pieces of equipment when you need to record equipment usage on a piece-by-piece basis. In addition, you can update equipment records to indicate that a meter was replaced due to damage. You can also indicate when a meter rolls over. A meter rollover is the point at which a meter has reached its maximum value and reverts to a zero reading.

Enter and update meter readings for multiple pieces of equipment if you are:

- Updating meter readings for all equipment for which the usage is the same, such as for multiple pieces of production equipment that work the same number of hours on a given day
- Entering current meter readings for multiple pieces of identical new equipment

You use selection criteria to specify for which pieces of equipment the system updates meter information.

16.2.1 Before You Begin

- Verify that the following AAIs are set up:

- · AT00
- · FMA
- · FMB
- · FMC
- · FMD
- · FME

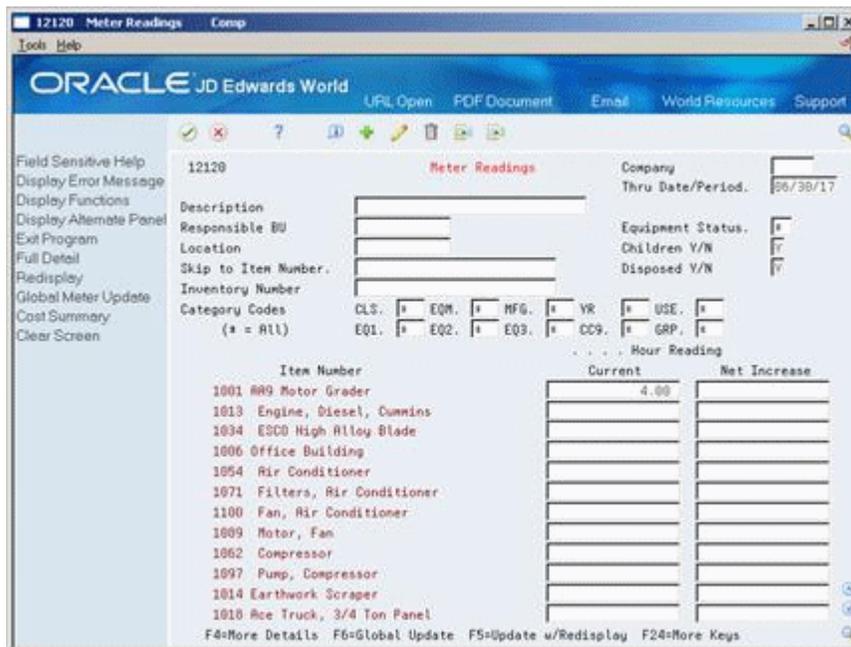
See Also:

- [Section 35.2.3, "Setting Up Equipment/Plant AAIs"](#)

To enter meter readings for a piece of equipment

On Meter Readings

Figure 16–1 Meter Readings screen



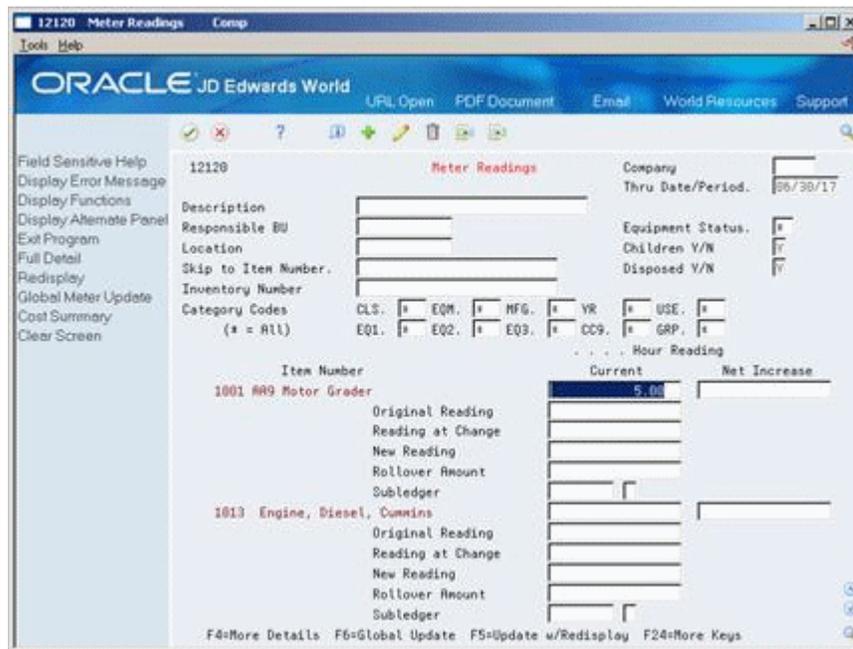
1. To locate a piece of equipment, complete any combination of the following fields:
 - Thru Date/Period

- Description
- Responsible BU
- Equipment Status
- Location
- Skip to Item Number
- Category Codes
- Company
- Inventory Number

Note: If you change any values in the fields above, choose the Enter action to refresh the display.

2. Complete only one of the following meter reading fields:
 - Current Meter Reading
 - Net Increase
3. Choose More Details.

Figure 16–2 Meter Readings screen (Details area)



4. Complete the following optional fields, if appropriate:
 - Original Reading
 - Reading at Change
 - New Reading
 - Rollover Amount
 - Subledger

- To enter a meter reading for another statistical account, choose Display Alternate Panel Format.

Field	Explanation
Original Reading	<p>The beginning reading of miles, hours, or fuel for a specific piece of equipment.</p> <p><i>Form-specific information</i></p> <p>To calculate the total lifetime hours for a piece of equipment, subtract the original reading from the current reading. For example, a piece of equipment with a current reading of 5,000 hours and an original reading of 2,000 hours has accrued 3,000 lifetime hours.</p>
Reading at Change	For a change in meters, the reading on the old meter at the time it was removed.
New Reading	For a change in meters, the reading on the new meter at the time it was installed.
Rollover Amount	This is the amount the meter would show just before the point it rolls over to a value of zero. For example, a rollover amount of 1000 indicates that the meter rolls over every one thousand units.

16.2.2 What You Should Know About

Topic	Discussion
Meter rollover	<p>You must complete the following fields in the fold area if you want the system to calculate the original reading when an equipment meter rolls over:</p> <ul style="list-style-type: none"> ■ Rollover Amount ■ Current Reading
Meter replacements	<p>You must complete the following fields if you replace the meter on a piece of equipment due to meter failure or damage:</p> <ul style="list-style-type: none"> ■ Current Reading ■ Reading at Change ■ New Reading
Updating original readings	<p>You enter a value in the Original Reading field only once. After a piece of equipment accumulates units, you should never have to change the original readings. When you enter meter information for a piece of used equipment, enter the actual meter reading shown on the face of the meter at the time you place the equipment in service. The system will update the original reading when the meter rolls over, or when you perform a meter replacement.</p>
Calculating the lifetime meter reading	<p>The system uses lifetime meter readings in general ledger transactions and when it updates the Item Balances table. To calculate the lifetime meter reading for a piece of equipment, subtract the original reading from the current reading.</p> <p>For example, the current reading is 5,000 hours and the original reading is 2,000 hours. The lifetime meter reading is 3,000 hours.</p>

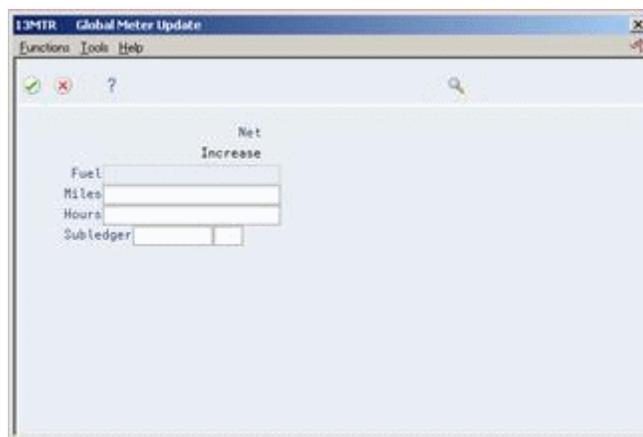
Topic	Discussion
Current and net increase fields	If you are entering a new reading, you can use either of these fields. You can either type over the current reading with the new reading, or use the net increase to enter the change since the last meter reading.
Meter Readings - Z File (P12120Z) (Release A9.3 Update)	<p>You can use the Meter Readings - Z File (P12120Z) processing program to call Meter Readings (P12120) as a batch process and use that data instead of data you enter manually; to create or update the Asset Balance file (F1202) and Account Ledger file (F0911).</p> <p>See Appendix B, "Import Mass Data into Equipment Plant Maintenance" for more information.</p>

To enter meter readings for multiple pieces of equipment

On Meter Readings

1. To limit your equipment search, complete any of the following fields:
 - Thru Date/Period
 - Description
 - Location
 - Equipment Status
 - Skip to Item Number
 - Inventory Number
 - Category Codes
 - Company
2. Choose Global Update.

Figure 16–3 Global Master Update screen



3. On Global Meter Update, complete any of the following fields:
 - Fuel
 - Miles
 - Hours
 - Subledger

4. To complete the process, choose Update.

The system updates meter readings for all equipment that matches the selection criteria you define.

16.2.3 Processing Options

See [Section 54.2, "Odometer Reading Update \(P12120\)"](#)

16.3 Working with Meter Estimates

You can use meter estimates to update meter readings for equipment whose usage is consistent and predictable. For example, assume you have a production line with multiple pieces of equipment. The production line runs 16 hours each day. You can set up meter estimates for each piece of equipment that indicate 16 hours per day. You can then update the meter readings each day, or set up your system to update the meter readings automatically at the end of each day.

Working with meter estimates consists of the following tasks:

- Setting up meter estimates
- Updating meter readings based on estimates

16.3.1 Setting Up Meter Estimates

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

From Equipment Information (G1311), choose Meter Estimates

You must set up meter estimates to provide the system with information about the equipment for which you want to use meter estimates.

To set up meter estimates

On Meter Estimates

Figure 16-4 Meter Estimates screen

1. To limit the equipment for which the meter estimates apply, complete any combination of the following fields:
 - Company
 - Description
 - Subledger
 - Subledger/Type
 - Business Unit
 - Location
 - Item Number
 - Category Codes
2. Complete the following field for each piece of equipment for which you want to apply an estimated meter reading:
 - Estimated Hour Meter

The name of the meter for this field might be different, depending on how you set up processing options.

Field	Explanation
Estimated Hour Meter	Estimated Operating Meter Reading is the estimated units that can be applied to the operating miles/hours meter.

16.3.2 What You Should Know About

Topic	Discussion
Updating meter estimates	You can choose Update Meter Estimates to update meter estimates directly from the Meter Estimate screen. When you choose Update Meter Estimates, the system runs version XJDE0001 of the Update Meter Estimates program.

16.3.3 Processing Options

See [Section 54.3, "Meter Reading Estimates \(P1306\)"](#)

16.3.4 Updating Meter Readings Based on Estimates

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

From Equipment Information (G1311), choose Update Estimates

After you set up meter estimates for equipment, you update the meter readings at regular intervals. The system uses the estimates that you enter on Meter Estimates as the basis for updating meters.

When you choose Update Meter Estimates, the system displays a DREAM Writer versions list. The versions list contains DEMO versions that you can run, or copy and modify to suit your needs. When you run a version, the system displays Processing Options Revisions before submitting the job for processing.

16.3.5 What You Should Know About

Topic	Discussion
Automatically updating meter estimates	<p>You can ensure that the system regularly updates the meter readings for equipment for which you have set up meter estimates by running Update Estimates as part of your unattended operations.</p> <p>See the <i>JD Edwards World Technical Foundation Guide</i> for more information about running unattended operations (SLEEPER).</p>

See Also :

- *JD Edwards World Technical Foundation Guide* for more information about running, copying, and changing a DREAM Writer version

16.3.6 Processing Options

See [Section 54.4, "Update Meter Estimates \(P13806\)"](#)

16.4 Reviewing Meter Readings

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

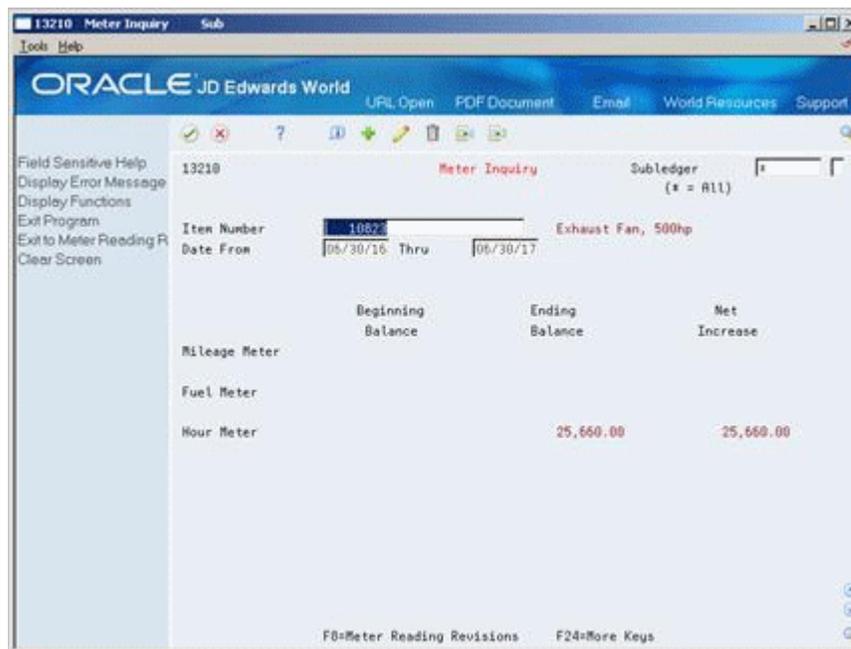
From Equipment Information (G1311), choose Meter Inquiry

You can review the meter readings for any piece of equipment. You can also specify the time period for which you want to review meter readings.

To review meter readings

On Meter Inquiry

Figure 16–5 Meter Inquiry screen



1. Complete the following fields:
 - Item Number
 - Date From
2. Complete the following optional fields:
 - Thru
 - Subledger
 - Subledger Type

16.4.1 What You Should Know About

Topic	Discussion
Revising meter readings	You can revise meter readings for any piece of equipment directly from Meter Inquiry. Choose Meter Reading Revisions. The system displays the Meter Reading Revisions screen.

Update PM Schedule Information

This chapter contains this topic:

- [Section 17.1, "Updating PM Schedule Information"](#)

17.1 Updating PM Schedule Information

Navigation

From Equipment/Plant Management (G13), choose Equipment/Plant Maintenance

From Equipment/Plant Maintenance (G1315), choose Update PM Schedule Status

Update PM schedule information to change the status of PMs. For example, you can specify that the system update all PMs from status 01 (Maintenance Task Defined) to status 50 (Maintenance Due) for all pieces of equipment due for scheduled maintenance based on their service intervals. You can also change the status of a PM before the equipment reaches its scheduled maintenance interval to allow time for scheduling parts and labor resources. In addition, you can specify which PMs you need to update, as well as the date that the update becomes effective.

Update PM Schedule Status is a batch program. When you choose Update PM Schedule Status, the system displays Processing Options Revisions before submitting the job for processing. After you select the processing options you want to apply to the update, a message appears, notifying you that the batch was submitted for processing. When you run this program, the system automatically:

- Updates the current miles, hours, and fuel consumption readings
- Calculates the current maintenance interval, based on the last maintenance performed
- Changes the status for each PM service type, if necessary
- Generates PM work orders, if necessary

17.1.1 What You Should Know About

Topic	Discussion
Generating work orders using Update PM Schedule Status	<p>You can use a processing option to specify that the system generates PM work orders when it updates the PM schedule status. You must associate a model work order with a PM to use this feature. When the system generates a work order, it:</p> <ul style="list-style-type: none"> ■ Uses the service type description on the Item PM Schedule or the description from the model work order for the work order description, depending on how you set up the Maintenance Rules. ■ Enters the parent number of the equipment in the Cross-Reference field on the work order. You can then search for the work order using the parent/component relationship. You can use a processing option to specify whether the system selects the equipment's immediate parent, its top level component, or the value from the model work order for the cross-reference value. ■ Uses the priority from the PM service type if you have not defined the priority on the model work order. <p>You can specify that the system update the PM schedule status without generating work orders and rerun the program later, specifying the system to generate work orders without updating the PMs.</p>
Accumulating multiple work orders	<p>Depending on how you have set the multiple work order flag for a service type that is due to be performed, the system might create a new PM cycle, regardless of the status of the maintenance task. If you do not want the system to recycle the PM for the service type until previously scheduled maintenance has been completed, you must leave the Multiple Work Order field on the PM schedule blank. Other values allow the system to reschedule the maintenance task and accrue multiple work orders.</p> <p>See Section 14.3.1, "Creating PM Schedules for Each Piece of Equipment" for more information about multiple work orders.</p>
Updating PMs for equipment under warranty	<p>When you change or update a warranty PM service type to complete, the system does not create a new PM cycle for that service type and piece of equipment.</p> <p>See Section 14.3.1, "Creating PM Schedules for Each Piece of Equipment" for more information about creating PM service types for equipment under warranty.</p>

17.1.2 Processing Options

See [Section 54.5, "Set Maintenance Status for Scheduled Maintenance \(P12807\)"](#).

Change the Status of PMs to Complete

This chapter contains this topic:

- [Section 18.1, "Changing the Status of PMs to Complete"](#)

18.1 Changing the Status of PMs to Complete

Navigation

From Equipment/Plant Management (G13), choose Equipment/Plant Maintenance

From Equipment/Plant Maintenance (G1315), choose PM History and Completion

You must notify the system when you have completed or canceled a PM for a piece of equipment. You notify the system that you have completed or canceled the PM for selected equipment by changing the status of a PM to complete or canceled. When you change the status of a PM to complete or canceled, the system:

- Maintains a record of the PM with a status of 99 (Complete), or 98 (Canceled)
- Generates a new PM with a status of 01 and begins a new PM cycle (depending on the value of the multiple work order flag on the PM schedule)

The system does not begin a new PM cycle for warranty service types.

You can change the status of PMs by individual piece of equipment or globally by using search criteria to select PMs for a group of equipment.

You can use processing options to automatically update the status of a PM work order when you change the status of a PM. You can also use processing options to update the meter readings in the Item Balances table (F1202) and the Account Ledger table (F0911) in the G/L when you enter meter readings on PM History and Completion.

You can choose from two display formats on PM History and Completion. One format appears with the completion date and completed meter readings on the first detail line of a PM record. The other format appears with the percent due, planned date, and model work order number on the first detail line of the PM record. Regardless of the format that you choose, fields that do not appear on the first detail line are accessible in the full detail portion of the screen. You use processing options to specify the format that you want to initially appear. You can also view the alternate format interactively by choosing a function.

You can use processing options to specify whether you want the system to display actual meter readings or lifetime maintenance amounts on PM History and Completion. The actual meter reading is the number that appears on the actual meter located on a piece of equipment. The lifetime maintenance amount is the total lifetime usage of the equipment. In cases such as meter changes or meter rollovers, the lifetime

maintenance amount is not the amount shown on the meter. If you select actual meter reading for this processing option, you must enter the meter reading as it appears on the actual meter. The system calculates the lifetime maintenance amount from this amount.

Whether you choose to display actual meter readings or lifetime maintenance amounts, the system always uses lifetime maintenance amounts to calculate service intervals.

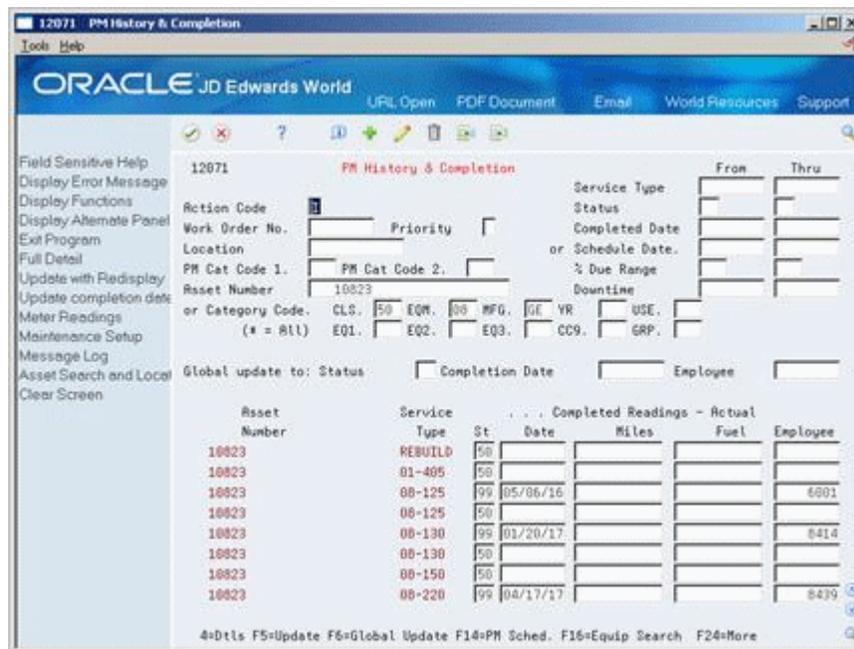
See Also:

- [Chapter 16, "Work with Meter Readings"](#) for more information about meter readings
- [Section 14.3.1, "Creating PM Schedules for Each Piece of Equipment"](#) for more information about warranty service types

To change the status of PMs to complete

On PM History and Completion (with processing options set to display completed meter readings on first detail line of the PM record)

Figure 18–1 PM History & Completion screen



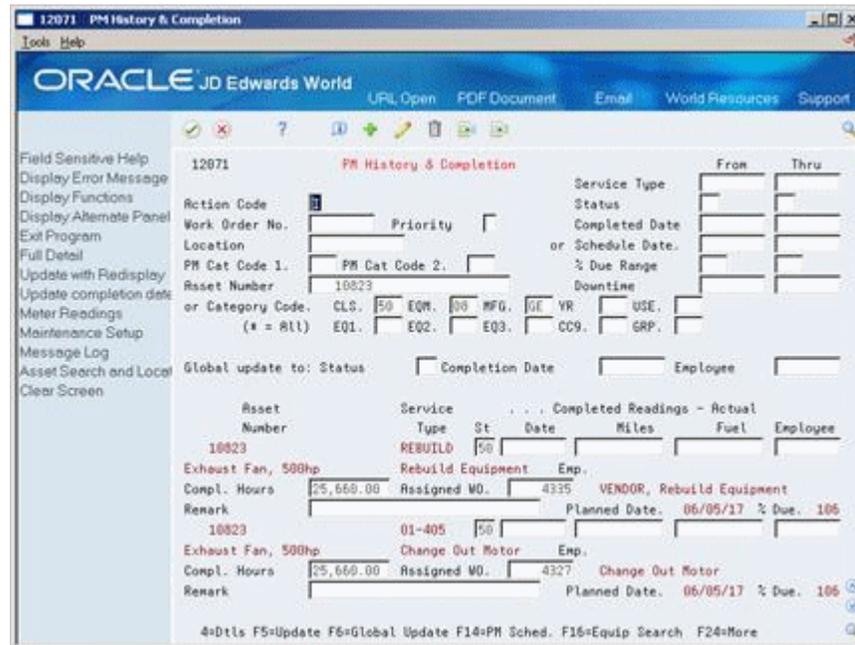
1. To choose the PMs to complete, complete any combination of the following fields:
 - Service Type From/Thru
 - Status From/Thru
 - Completed Date From/Thru
 - Scheduled Date From/Thru
 - Work Order No.
 - Priority
 - PM Cat Code 1

- PM Cat Code 2
- Downtime From/Thru
- % Due Range From/Thru
- Location
- Asset Number
- Equipment Category Codes 1 - 10

Your system might be set up to display only the first five equipment category codes. See [Section 35.2.1, "Setting Up Equipment Constants"](#) for more information.

2. To change the status of the PM, complete the following fields:
 - Status
 - Completed Date
3. To update the statistical units in the Maintenance Schedule table (F1207), enter values in the following optional Completed Readings fields:
 - Miles
 - Fuel
4. Choose Full Detail.

Figure 18–2 PM History & Completion screen (Detail area)



5. Complete the following optional fields:
 - Hours
 - Assigned WO
 - Remark

Field	Explanation
St	<p>A user defined code (12/MS) that indicates the maintenance status of a piece of equipment, such as 50 for maintenance due or 60 for waiting for parts.</p> <p>Note: Status code 98 is reserved for canceled maintenance. Status code 99 is reserved for completed maintenance. Status code 01, the default, is reserved for initial maintenance setup.</p> <p><i>Form-specific information</i></p> <p>If you enter a status of 99, the system requires you to enter a date in the Completed Date field.</p>
Completed Date	<p>This is the actual date that maintenance was completed.</p> <p><i>Form-specific information</i></p> <p>When you enter a value in this field and leave the Maintenance Status field blank, the system automatically updates the PM status to 99 (Complete).</p>
% Due	<p>A percentage measure that indicates how close a piece of equipment is to requiring maintenance. This percentage is based on the greater of the actual date, miles, hours, or fuel consumption compared to the threshold date, miles, hours, or fuel consumption. A percentage of 090 means that the piece of equipment is 10% away from requiring maintenance. A percentage greater than 100 means that maintenance is past due.</p> <p><i>Form-specific information</i></p> <p>You can enter numbers in the % Due Range From and Thru fields to limit your search to pieces of equipment that are within a certain percent of requiring maintenance.</p>
Compl. Hours	Actual hours at completion of maintenance.
Assigned WO	The Work Order Number related to a particular Equipment Maintenance line item. The system assigns this number from next numbers.
Emp	<p>Address number of the person assigned to do the work.</p> <p><i>Form-specific information</i></p> <p>This is the address book number of the person assigned to the work order. If you add or change this number, the system automatically updates the work order master with the new value.</p>

18.1.1 What You Should Know About

Topic	Discussion
Globally updating the PM status	<p>You can globally update multiple PMs whose status, completion date, and employee responsible for the PM work order are the same. After you have narrowed your search to a specific group of PMs, enter values in the following Global update to fields:</p> <ul style="list-style-type: none"> ■ Status ■ Completion Date ■ Employee <p>Choose Global Update. The system updates all selected PMs. In addition, when you update the Employee field, the system updates the Assigned To field on the PM work order.</p>

Topic	Discussion
Reviewing PM history	You can view PM history by entering 99 in the Status field. The system displays all completed PMs. Use selection criteria to limit the number of records that the system displays.

18.1.2 Processing Options

See [Section 54.6, "Completed Maintenance \(P12071\)"](#)

Part III

Work Order Life Cycle

This part contains these chapters:

- [Chapter 19, "Overview to Work Order Life Cycle"](#)
- [Chapter 20, "Create Corrective Work Orders"](#)
- [Chapter 21, "Set Up a Project"](#)
- [Chapter 22, "Review and Approve Work Orders"](#)
- [Chapter 23, "Work with Work Orders"](#)
- [Chapter 24, "Swap a Component"](#)
- [Chapter 25, "Purchase Parts for a Work Order"](#)
- [Chapter 26, "Add Costs to Work Orders"](#)
- [Chapter 27, "Review Work Order Information"](#)

Overview to Work Order Life Cycle

This chapter contains these topics:

- [Section 19.1, "Objectives"](#)
- [Section 19.2, "About the Work Order Life Cycle"](#)
- [Section 19.3, "Work Order Process Flow"](#)

19.1 Objectives

- To understand the events in the work order life cycle
- To create work orders for corrective maintenance
- To set up projects using multiple work orders

19.2 About the Work Order Life Cycle

Use work orders to manage the work flow of your maintenance tasks and projects. You can manage all aspects of a maintenance task or project, including the following:

- Creating work orders for preventive and corrective maintenance
- Purchasing parts and materials and committing inventory to a work order
- Scheduling multiple tasks and crafts, such as mechanical, electrical, and so on, to a work order
- Tracking the progress of a work order by status
- Tracking work order costs, such as materials, labor, and so on
- Recording unlimited detailed information about a work order
- Completing and closing a work order

The steps through which a work order must pass to accurately communicate the progress of the maintenance tasks it represents make up the life cycle of the work order. The work order life cycle applies to work orders for preventive maintenance and corrective maintenance.

The work order life cycle consists of the following tasks:

- Creating corrective work orders
- Setting up a project
- Reviewing and approving work orders
- Working with work orders

- Swapping a component
- Purchasing parts for a work order
- Adding costs to work orders
- Reviewing work order information

19.2.1 Features of the Work Order Life Cycle

Feature	Description
Paperless processing	Save paper when you manage your maintenance tasks and projects using work orders. You enter work orders online and perform most of the subsequent processing without relying on printed documents.
Work order creation	You can create a single work order or a group of work orders quickly and easily, with minimal preplanning. You can set processing options and use parent work orders to direct the system to enter default values for a variety of work order information when you create work orders. When you use processing options and parent work orders, you save time and reduce the possibility of errors.
Work order approval	Establish approval controls for a work order based on a variety of criteria, including work order type, status, and the currency amount of the work order. For example, you can specify that all maintenance work orders must be approved before any work can begin. You can also specify who must approve the work orders and the threshold currency amount for which each person is responsible. You can also review the approval status of a work order.
Work order activity rules	<p>You can define work order activity rules that differ by work order type. You can use these rules to track a work order in its life cycle, review work orders that apply to certain procedures, and prepare reports based on a work order's current status. You can also define the flow of statuses a work order must follow during its life cycle. In addition, you can define any of the following:</p> <ul style="list-style-type: none"> ■ Whether the work order is active or inactive at a particular status ■ Whether to commit inventory at a particular status ■ Whether to run the capacity update at a particular status ■ Whether to change the status of the PM associated with a work order ■ Whether to prevent changes to a work order
Work order location	<p>You can locate a work order using a variety of information. For example, you can limit your search for a work order by using any combination of the following information:</p> <ul style="list-style-type: none"> ■ The job or business unit ■ The address book numbers of the originator, customer, manager, or supervisor ■ The life-cycle status of a work order ■ Any combination of the user defined category codes ■ The type of work order ■ The priority given to a work order ■ Start and completion dates

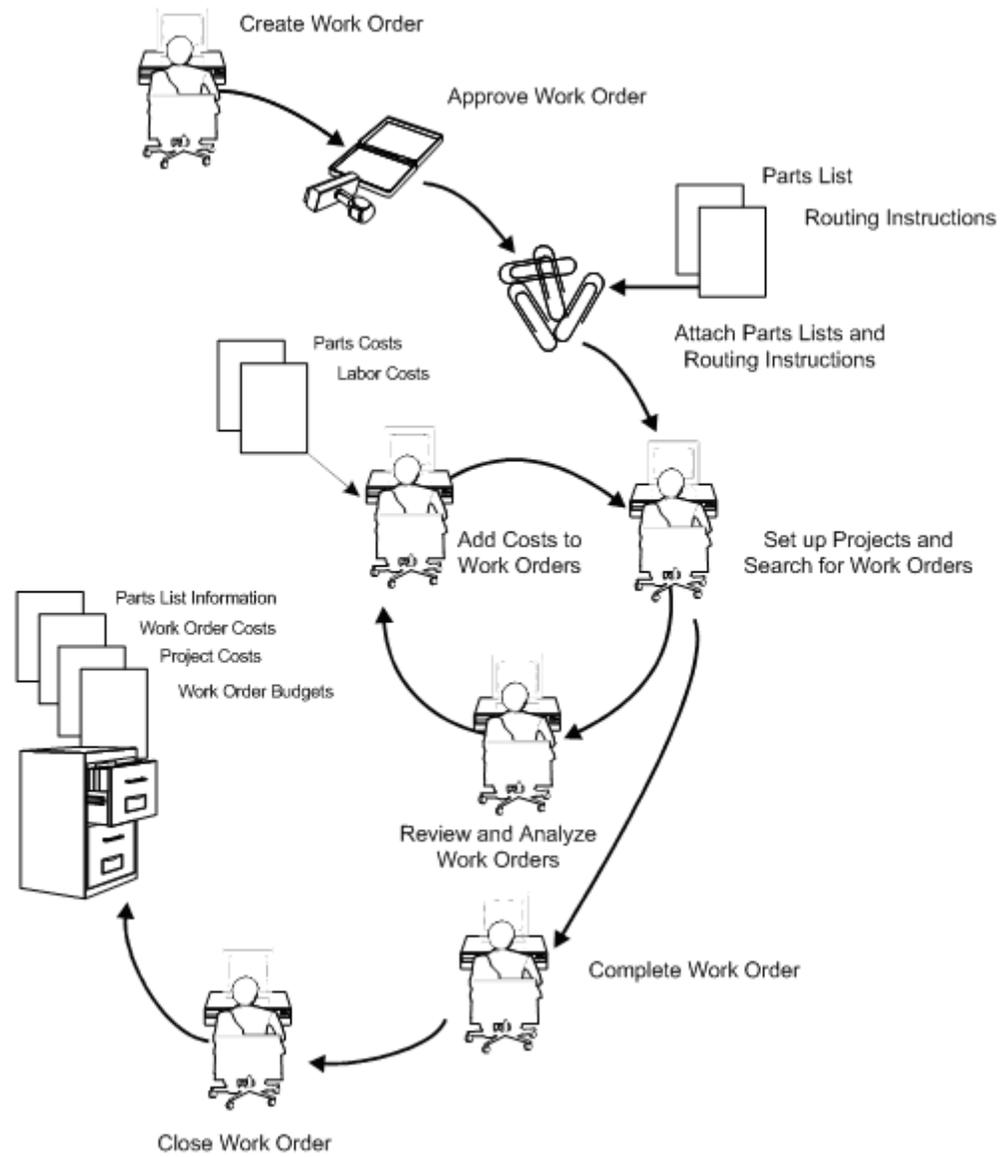
Feature	Description
Work order updates	<p>You can use Backlog Management to update work orders. For example, you can update the following:</p> <ul style="list-style-type: none"> ■ Life-cycle status ■ Planned start and completion dates ■ Percentage of the work completed ■ Estimated hours to complete the work ■ Flash message ■ Type and priority
Simple budgeting and estimate controls	<p>You can track the simple estimate and budget requirements of a work order. For example, you can use the Estimated Hours and Amounts fields on the Cost by Work Order screen to enter budget information, and then update the information using Backlog Management. You can also track the information from Backlog Management and Cost Accounting screens. In addition, you can use a variety of reports to compare estimates with actual information.</p>
Multiple control dates	<p>You can track each work order according to control dates that you define, such as:</p> <ul style="list-style-type: none"> ■ The transaction date (the date that a work order is entered into the system) ■ The start date ■ The planned completion date ■ The actual completion date ■ The assignment date (the date that the person responsible for the work receives the work order)
Levels of responsibility	<p>You can assign several levels of responsibility to a work order, such as:</p> <ul style="list-style-type: none"> ■ The job or business unit to which the work order is charged ■ The originator of the work order ■ The manager ■ The supervisor <p>You can review all the work orders assigned to a particular person or location.</p>
Work order description	<p>You can describe work orders briefly using two- or three-word descriptions, or you can provide much more detail. You can also enter different types of information in the record types you assign to a work order, such as:</p> <ul style="list-style-type: none"> ■ Expected actions ■ Actual operations performed ■ Tools required ■ Procedures for completing the work <p>You define the record types that are appropriate to your organization.</p>

Feature	Description
Project setup and tracking	<p>You can create, organize, update, and track small projects and all of their associated work orders. You can manage these projects according to the following information:</p> <ul style="list-style-type: none"> ■ The customer number ■ The parent work order number (project number) ■ The job or business unit number
Project management reporting	<p>You can manage projects using any of the following Simple Project Management reports:</p> <ul style="list-style-type: none"> ■ Project Gantt Chart. This report shows a graphic representation of the start and end points of the series of work orders that make up a project. ■ Project Task Details. This report provides detailed information on the work orders (tasks) in a project. ■ Project Punch List. This report provides a description and the most current status of each work order in a project. ■ Project Status Summary. This report lists all work orders assigned to a particular manager and a summary of work order activity for that manager by status, type, and phase.

19.3 Work Order Process Flow

The following graphic illustrates the flow of a work order through a typical work order life cycle.

Figure 19-1 Work Order Process Flow



Create Corrective Work Orders

This chapter contains these topics:

- [Section 20.1, "Creating Corrective Work Orders"](#)
- [Section 20.2, "Entering Basic Work Order Information"](#)
- [Section 20.3, "Assigning Estimated Costs to a Work Order"](#)
- [Section 20.4, "Assigning Category Codes to a Work Order"](#)
- [Section 20.5, "Adding Text to a Work Order"](#)
- [Section 20.6, "Working with Work Order Supplemental Information"](#)
- [Section 20.7, "Assigning Parts to a Work Order"](#)
- [Section 20.8, "Assigning Labor Routing to a Work Order"](#)
- [Section 20.9, "Copying a Work Order"](#)
- [Section 20.10, "Creating a Work Order for Unscheduled Maintenance"](#)

20.1 Creating Corrective Work Orders

You create corrective work orders in Equipment/Plant Maintenance to formally request and schedule corrective maintenance and other unscheduled maintenance, such as emergency repairs. You also use corrective work orders to record and communicate all details pertaining to the maintenance task to others who are involved.

You must create a work order master for every work order that you want to track. The master consists of basic information that defines the work order, such as the work order number, description, and the business unit to which the work order is charged. You can also enter additional information to further identify the work order, such as category codes and user defined supplemental information.

The system stores work order master information in the Work Order Master table (F4801).

You can assign record types to work orders and then enter descriptive information into each record type to communicate important information about a task to others who are involved. For example, you might want to include special instructions, information about parts and tools needed to complete the task, and so on.

In addition, you can copy parts from a standard parts list or assign non-standard parts to a work order. You can also assign detailed labor routing instructions to a work order. For example, you can:

- Identify each work center needed to perform the maintenance tasks

- Specify the sequence in which the tasks are performed
- Indicate the estimated duration of each maintenance task

You can also create work orders by duplicating the information from existing work orders for those tasks that are similar to other tasks you perform.

20.1.1 Before You Begin

- Define your chart of accounts for the charge-to business unit information. See *Creating Your Chart of Accounts in the JD Edwards World General Accounting I Guide*.

20.1.2 What You Should Know About

Topic	Discussion
Work order activity rules	<p>Different work order activity rules might be in effect, based on the document type and work order type that you assign to a work order. For example, if the activity rules specify that the subledger is inactive at a particular status and you assign that status to the work order, you will not be able to apply future transactions to the work order. Review the work order activity rules prior to assigning a document type and work order type. See Chapter 38, "Set Up Work Orders"</p>
Work order approval routing	<p>Different approval routings might be in effect, based on the document type, work order type, status, and approval type you assign to a work order. For example, you might create a work order for which you cannot assign a particular status until the work order is approved. Review the work order approval routing prior to creating a work order. See Chapter 38.5.5, "Setting Up Work Order Approval Routes".</p>
Assigning default values	<p>You can use processing options to direct the system to automatically enter default values in the following fields on Work Order Entry:</p> <ul style="list-style-type: none"> ■ Type ■ Priority ■ Work Order Type (Document Type) ■ Category Code fields 1 - 3 <p>You can also retrieve numerous default values from a parent work order, if you specify one. For example, you can use values from a parent work order to enter the following fields.</p> <ul style="list-style-type: none"> ■ Work Order Type ■ Start Date ■ Planned Completion Date <p>In addition, you can use processing options to automatically complete all of the address book fields, such as Manager and Supervisor, if you defined them when setting up the system. See Chapter 38.2, "Setting Up Default Managers and Supervisors".</p>

Topic	Discussion
Optional fields on the Work Order Entry screen	Many of the fields on the Work Order Entry screen are optional. You can use processing options to specify that certain of these fields require an entry. Information in these fields is particularly useful when you search for a work order or group of work orders using Backlog Management. See Chapter 23.2, "Locating Work Orders"

20.2 Entering Basic Work Order Information

Navigation

From Equipment/Plant Management (G13), choose **Equipment Work Orders**

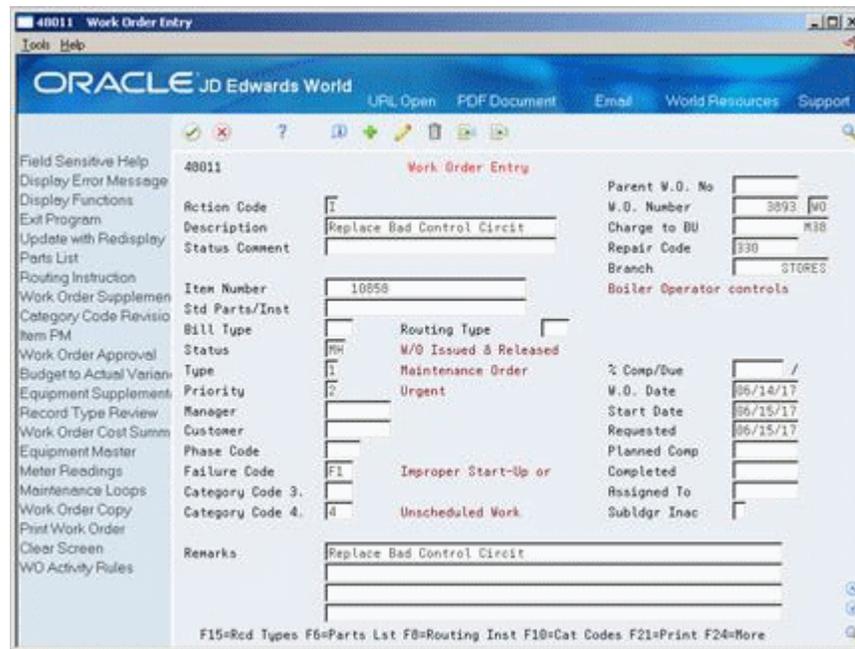
From **Equipment Work Orders (G1316)**, choose **Work Order Entry**

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

To enter basic work order information

On Work Order Entry

Figure 20–1 Work Order Entry screen



1. Complete the following fields:

- Description
- Charge to BU
- Branch

The Branch field might already contain a default value.

2. Complete the following optional field:
 - Start Date

You must enter a start date if you plan to attach routing instructions or a parts list.
3. To assign parts from a standard parts list, complete the following field:
 - Stnd Parts/Inst (Standard Parts or Instructions)
4. Complete the following optional address book fields:
 - Manager
 - Customer
 - Assigned to
5. Complete the following optional work order date fields:
 - Planned Comp (Completion Date)
 - Completed Date
 - Requested Date
6. To prevent the entry of transactions to the work order, complete the following field:
 - Subledger Inactive
7. To enter additional information for the work order, complete any of the remaining fields.

Field	Explanation
Branch	<p>A code that represents a high-level business unit. It can be used to reference a branch or plant that might have departments or jobs, which represent lower-level business units (data item MCU), subordinate to it. For example:</p> <ul style="list-style-type: none"> ■ Branch/Plant (MMCU) ■ Dept A (MCU) ■ Dept B (MCU) ■ Job 123 (MCU) <p>Business unit security is based on the higher-level business unit.</p> <p><i>Form-specific information</i></p> <p>This field identifies the Branch/Plant that keeps the parts inventory.</p>
Start Date	<p>This is a start date that you can enter, or an automatic start date which the planning system calculates using a backscheduling routine. The routine starts with the required date and offsets the total lead time to calculate the appropriate start date.</p> <p>Will default from system date or you can enter a date.</p> <p><i>Form-specific information</i></p> <p>You must enter a start date if you attach a parts list or routing to the work order.</p>
W.O. Date	The date the work order was entered into the system.
Requested	The date that an item is to arrive or that an action is to be complete.

Field	Explanation
Subldgr Inac	<p>A code that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive. Examples are jobs that are closed, employees that have been terminated, or assets that have been disposed. If a subledger becomes active again, set this field back to blank.</p> <p>To use subledger information in the tables for reports but prevent transactions from posting to the master record, enter a value other than blank in this field.</p>

20.2.1 What You Should Know About

Topic	Discussion
Equipment under warranty	<p>When you create a work order for a piece of equipment that is under warranty, a warning message appears to alert you that a warranty is in effect. You indicate that a piece of equipment is under warranty by creating PM service types for the warranty.</p> <p>See Chapter 14.3.1, "Creating PM Schedules for Each Piece of Equipment" for more information about creating PM service types for equipment under warranty.</p>
Deleting a work order	<p>You can delete any work order unless it has any of the following characteristics:</p> <ul style="list-style-type: none"> ■ It is used as a parent work order. ■ It has any account ledger transactions associated with it. ■ It has a parts list or a routing attached.
Model work orders	<p>A model work order is defined by the presence of an X in the first position of the second line of description for the user defined code for Work Order Type (system 00, type TY).</p> <p>You can specify that the system exclude model work orders from Backlog Management searches.</p> <p>See Chapter 15.6, "Creating a Model Work Order" for more information on using model work orders.</p> <p>See Chapter 36.1, "Setting Up User Defined Codes" for more information about work order types.</p>
Parts lists and routings for model work orders	<p>When you choose Parts List from a model work order, the system accesses the Standard Parts List screen. When you choose Routings, the system accesses the Standard Instructions screen.</p>
Work Order entry and the charge to BU field	<p>If an equipment number is entered on the work order and the Charge to BU is left blank, the system will default the Charge to BU from the Equipment Master Responsible BU field.</p>

20.2.2 Processing Options

See [Section 55.1, "Equipment Work Order Entry \(P48011\)"](#)

20.3 Assigning Estimated Costs to a Work Order

Navigation

From Equipment/Plant Management (G13), choose **Equipment Work Orders**

From Equipment Work Orders (G1316), choose **Work Order Entry**

After you create a work order, you can use Work Order Cost Summary to assign estimated costs to the work order. You can use estimated costs to provide responsible individuals with budgeting information regarding the work order. In addition, depending on how you set up work order approvals, the estimated costs that you assign to a work order determine its approval routing. You can assign the following information on Work Order Cost Summary:

- Estimated hours
- Duration (the total time that is required to complete the work order)
- Estimated labor cost
- Estimated material cost
- Estimated costs not related to labor or material, such as subcontractor costs

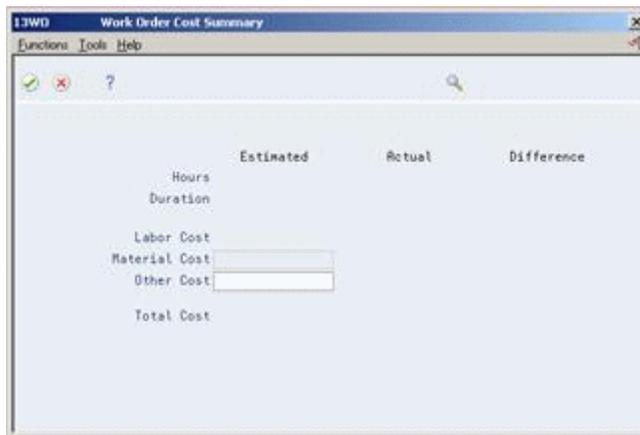
Depending on how you have set up equipment constants, you can also enter actual costs for the work order.

To assign estimated costs to work order

On Work Order Entry

1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose Work Order Cost Summary.

Figure 20–2 Work Order Cost Summary screen



3. On Work Order Cost Summary, complete any of the following fields:
 - Estimated Hours
 - Estimated Duration
 - Estimated Labor Cost
 - Estimated Material Cost
 - Estimated Other Cost

Depending on how you set up equipment constants, you might not be able to enter values in the actual cost fields.

4. To assign actual work order costs, complete any of the following fields:
 - Actual Labor Cost

- Actual Material Cost
- Actual Other Cost

Depending on how you set up equipment constants, you might not be able to enter values in the actual cost fields.

5. Complete the following optional fields:
 - Actual Hours
 - Actual Duration
6. To calculate the total estimated and actual costs and the difference between them, choose Update with Redisplay.

20.3.1 What You Should Know About

Topic	Discussion
Parts lists and labor routing instructions	If you use parts lists and routings, the system enters cost information from the parts list and the routing to the estimated cost fields on Work Order Cost Summary. You cannot update these values on Work Order Cost Summary.

20.4 Assigning Category Codes to a Work Order

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Entry

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

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

20.4.1 What You Should Know About

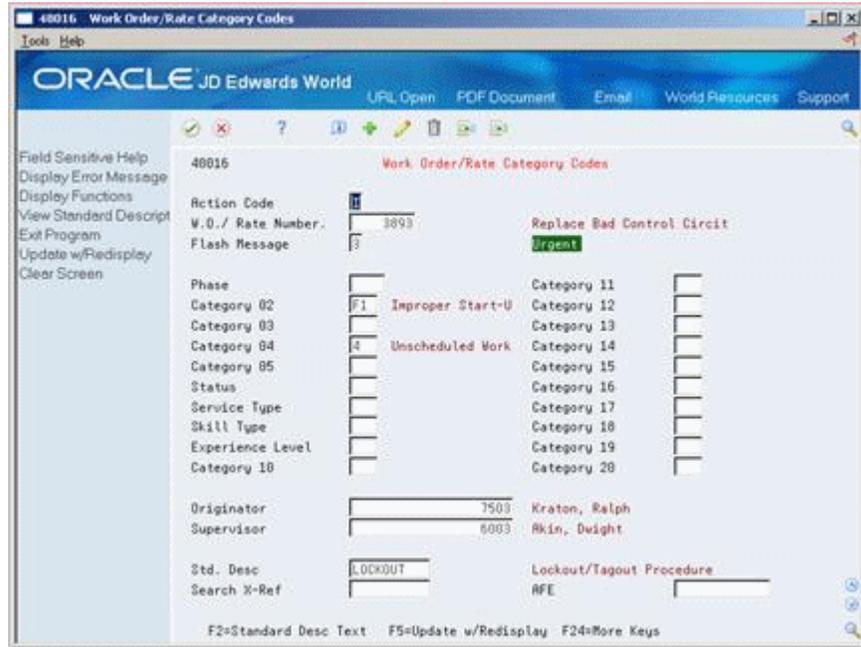
Topic	Discussion
Category code 1	Category code 1 is a four-character category code that appears on all work order reports and most screens that are associated with work orders.
Work order codes	The system includes up to 20 category codes that you can define.

To assign category codes to a work order

On Work Order Entry

1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose Category Codes.

Figure 20–3 Work Order/Rate Category Codes screen



3. On Work Order/Rate Category Codes, complete any of the category code fields that you want to apply to the work order.
4. Complete the following optional address book fields:
 - Originator
 - Supervisor
5. To assign a standard description from the Generic Rates and Messages table to the work order, complete the following optional field:
 - Standard Description
6. Complete the following additional optional fields:
 - Work Order Flash Message
 - Search Cross Reference
 - Authorization for Expenditure

Depending on how you set processing options for Work Order Entry, the Search Cross Reference field might contain a default value.

Field	Explanation
Std. Desc	<p>A user defined code (system 48, type SN) that is assigned to a standard note, message, or general narrative explanation. You can use this code to add instructional information to a work order. You set up codes for this field on Standard Description.</p> <p><i>Form-specific information</i></p> <p>For Equipment/Plant Maintenance users:</p> <p>You can use this code to assign narrative text for a standard procedure. The information appears on the Item PM schedule and the work order routing.</p>
W.O. Flash Message	<p>A user defined code (system 00, type WM) that indicates a change in the status of a work order. The system indicates a changed work order with an asterisk (*) in the appropriate report or inquiry screen field. The flash message is highlighted in the Description field of the work order.</p> <p><i>Form-specific information</i></p> <p>The flash message appears as a highlighted message on Backlog Management, replacing the work order description.</p>
Search X-Ref	<p>An alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.</p>
AFE	<p>A number that provides additional information about an object, such as an asset or a work order. You can enter information in this field to track an item that is Authorized for Expenditure.</p>

20.4.2 What You Should Know About

Topic	Discussion
Using an equipment number as a search cross-reference	<p>If you enter an equipment number when you create a work order, the system assigns a default search cross-reference number based on that equipment number.</p> <p>You can use processing options to control whether the system assigns the equipment's immediate parent number, or its top-level parent number as the search cross-reference number.</p>

20.5 Adding Text to a Work Order

Navigation

From Equipment/Plant Management (G13), choose **Equipment Work Orders**

From **Equipment Work Orders (G1316)**, choose **Work Order Entry**

You can add additional text to further describe details about a work order by using record types assigned to work orders. For example, you might want to include an extended description of the maintenance task in record type A, special instructions in record type B, parts and tools needed in record type C, and so on.

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

- Description only

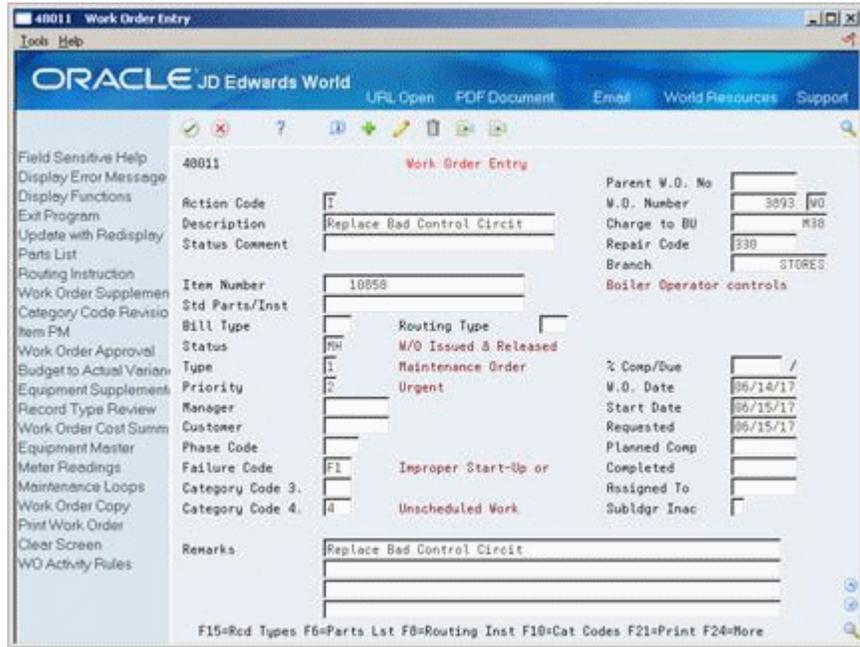
- Description with three columns

You can also copy descriptive information from another work order.

To add text to a work order

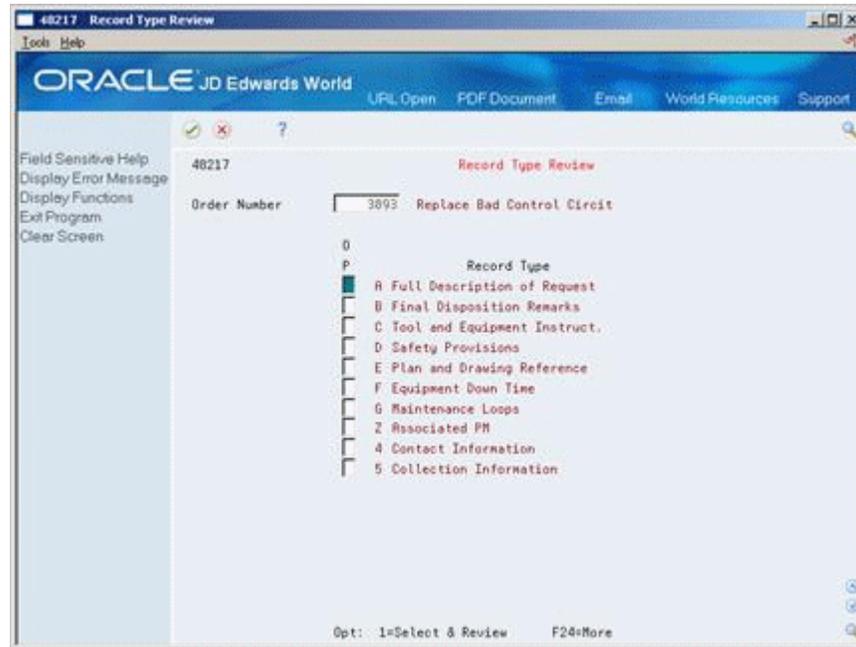
On Work Order Entry

Figure 20–4 Work Order Entry screen



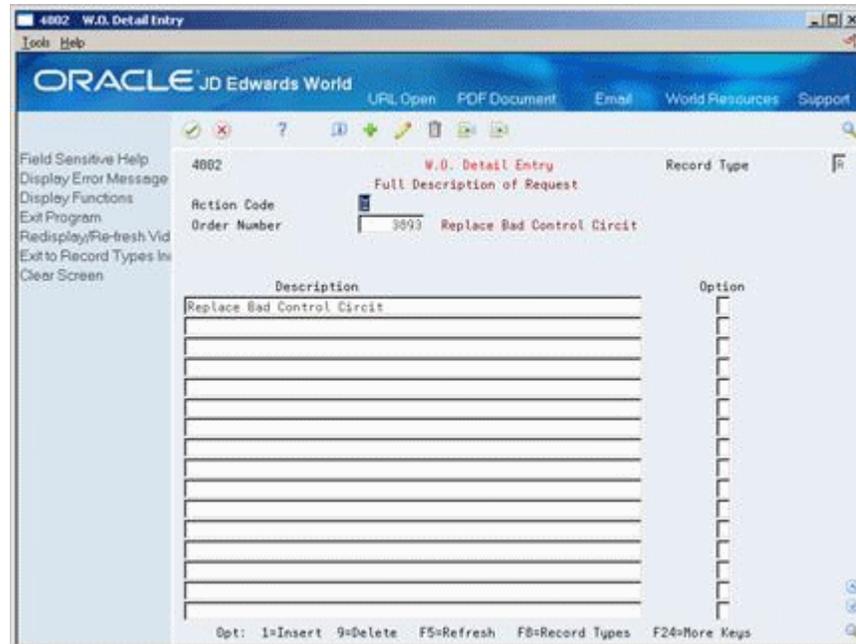
1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose the Record Types function.

Figure 20–5 Record Type Review screen



3. On Record Type Review, choose Select and Review for each record type to add text.

Figure 20–6 W. O. Detail Entry screen (Full Description of Request)



4. On Work Order Detail Entry, enter the appropriate information for the current record type.
5. Repeat steps 3 and 4 for each record type you want to add to the work order.

20.5.1 What You Should Know About

Topic	Discussion
Extended descriptions for work orders	The system stores the extended description of work orders in record type A. You can review this record type on the Work Order Entry screen.

See Also :

- [Chapter 20.9, "Copying a Work Order"](#)
- [Chapter 38.4, "Setting Up Record Types"](#)

20.6 Working with Work Order Supplemental Information

You can add additional user defined information to a work order. Use supplemental information to assist in tracking and reporting on work orders. For example, you might set up a supplemental data type associated with safety procedures and enter specific safety procedures for each work order.

After you have entered supplemental data, you can review the information using the following formats:

Format	Description
By data type	You can review a list of additional work order information based on a particular supplemental data type. For example, assume that you have set up a supplemental data type for budget estimates. You can review a list of all work orders for which you have assigned the supplemental data type for budget estimates.
By work order	You can review a list of the additional information by supplemental data type that you assigned to individual work orders.

Adding supplemental data to work orders consists of the following tasks:

- Entering supplemental information to a work order
- Reviewing supplemental data by type
- Reviewing supplemental data by work order

20.6.1 Entering Supplemental Information to a Work Order

Navigation

From Work Order/Service Billing Processing (G48), choose Work Order Processing

From Work Order Processing (G4811), choose Supplemental Data

From Work Order Supplemental Data (G4813), choose Data Entry

Enter supplemental information to a work order when you need to record information that is not included on the work order header or in work order record types. You can use supplemental information to assist in tracking and reporting on work orders.

After you enter supplemental information to a work order, you can review the information by selecting a data type and reviewing all work orders that contain that data, or by reviewing all of the supplemental data for a specific work order.

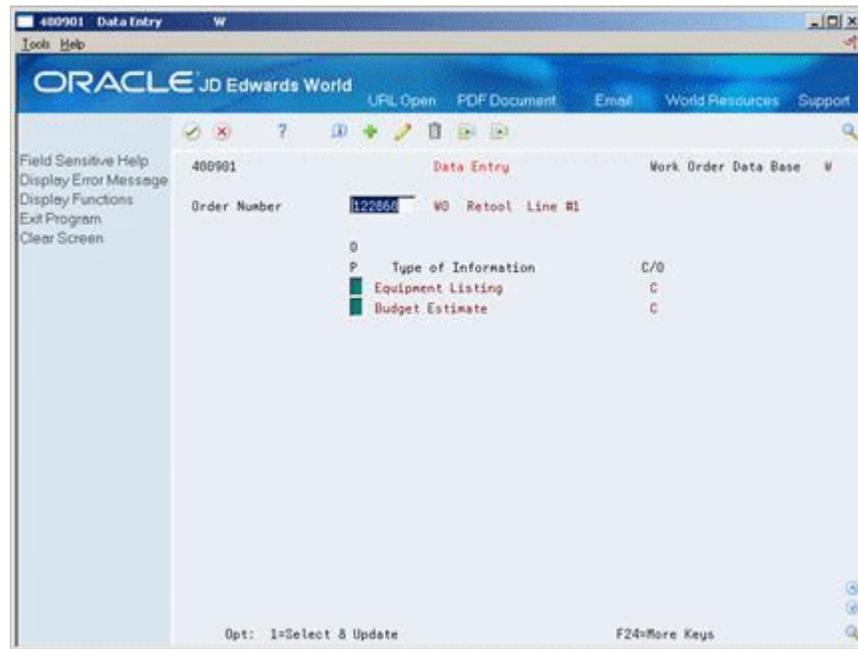
See Also:

- [Section 20.6.2, "Reviewing Supplemental Data by Type"](#)
- [Section 20.6.3, "Reviewing Supplemental Data by Work Order"](#)

To enter supplemental information to a work order

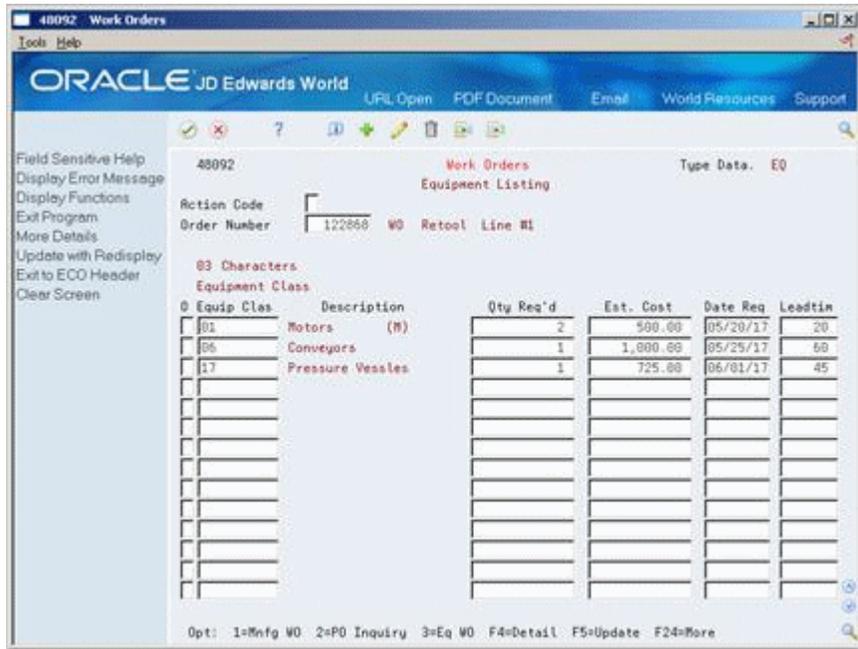
On Data Entry

Figure 20–7 Data Entry screen



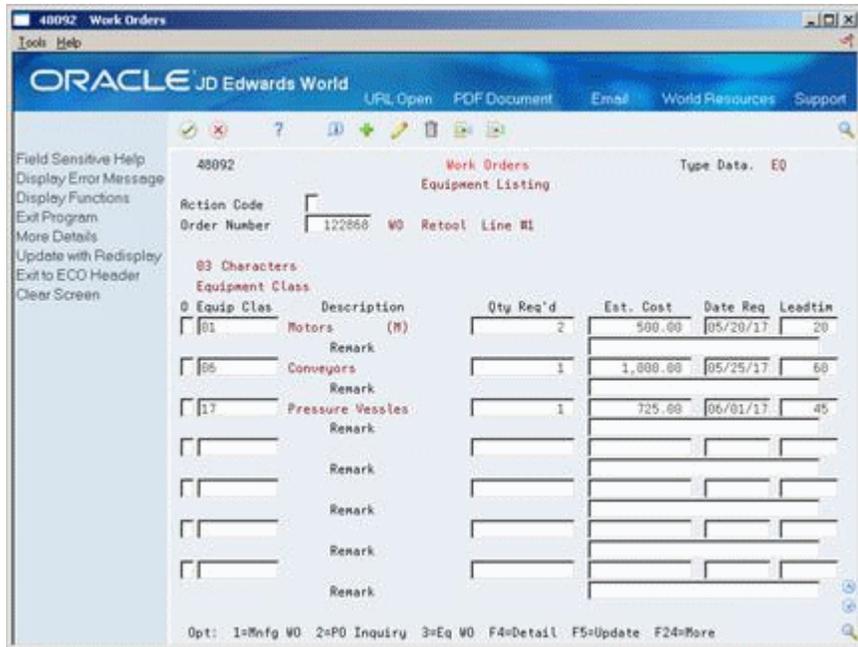
1. Complete the following field:
 - Order Number
2. For each type of information that you want to enter, choose Select and Update.

Figure 20–8 Work Orders screen (Equipment Listing)



3. On Work Orders, complete any of the appropriate fields.
4. Choose Detail.

Figure 20–9 Work Orders screen, Equipment Listing (Detail area)



5. Complete the appropriate fields.
6. Choose Update with Redisplay.

20.6.2 Reviewing Supplemental Data by Type

Navigation

From Work Order/Service Billing Processing (G48), choose Work Order Processing

From Work Order Processing (G4811), choose Supplemental Data

From Work Order Supplemental Data (G4813), choose Inquiry by Data Type

You can review a list of additional work order information based on a particular supplemental data type. For example, assume that you have set up a supplemental data type for budget estimates. You can review a list of all work orders for which you have assigned the supplemental data type for budget estimates.

To review supplemental data by type

On Inquiry by Data Type

Figure 20–10 Inquiry by Data type screen

Equip Clas	Description	Order No	Ty Date Req	Qty Req'd	Est. Cost
01	Motors (M)	122860	W0 05/20/17	2	500.00
06	Conveyors	122860	W0 05/25/17	1	1,000.00
17	Pressure Vessels	122860	W0 06/01/17	1	725.00
10	Gas Meters	372445	RV 06/01/17	1	450.00
10	Gas Meters	372470	RV 07/01/17	1	1,035.00
10	Gas Meters	372736	RV 04/07/17	1	
01	Motors (M)	372752	R6 06/30/17	1	175.00
02		372752	R6 06/30/17	1	25.00

1. Complete the following field:
 - Type Data
2. To view additional information, choose Detail.

Figure 20–11 Inquiry by Data Type screen (Detail area)

Equip Clas	Description	Order No	Ty	Date Req	Qty Req'd	Est. Cost
01	Motors (H)	122860	W0	05/20/17	2	500.00
	W.O. Desc. Retool Line #1			Leadtime 20	Rem	
06	Conveyors	122860	W0	05/25/17	1	1,000.00
	W.O. Desc. Retool Line #1			Leadtime 08	Rem	
17	Pressure Vessels	122860	W0	06/01/17	1	725.00
	W.O. Desc. Retool Line #1			Leadtime 45	Rem	
10	Gas Meters	372445	RV	06/01/17	1	450.00
	W.O. Desc. New Customer Turn			Leadtime 15	Rem	
10	Gas Meters	372470	RV	07/01/17	1	1,035.00
	W.O. Desc. New Customer Turn			Leadtime 5	Rem	
10	Gas Meters	372736	RV	04/07/17	1	
	W.O. Desc. New Customer Turn			Leadtime 4	Rem	
01	Motors (H)	372752	R6	06/30/17	1	175.00
	W.O. Desc. Adjust Appliance			Leadtime 2	Rem	Requires a special order.
02	Adjust Appliance	372752	R6	06/30/17	1	25.00
	W.O. Desc. Adjust Appliance			Leadtime 2	Rem	1 10' section

Opt: 1=Data Entry F4=Detail F24=More Keys

20.6.3 Reviewing Supplemental Data by Work Order

Navigation

From Work Order/Service Billing Processing (G48), choose Work Order Processing

From Work Order Processing (G4811), choose Supplemental Data

From Work Order Supplemental Data (G4813), choose Inquiry by Order

You can review a list of the additional information by supplemental data type that you assigned to individual work orders. This is particularly useful if you need to see at a glance all of the supplemental information you entered for a specific work order.

When you enter a work order number on Inquiry by Order, basic work order information appears, in addition to its supplemental data. For example, you can review the following information about the work order:

- Type
- Priority
- Status
- Work order dates, such as the start date and the completed date

To review supplemental data by work order

On Inquiry by Order

Figure 20–12 Inquiry by Order screen

Order Number	122060	W0 Retool Line #1			
Type	3	Capital Project	Work Order Date	03/28/14	
Priority	3	Normal - RSNP	Start Date	05/20/17	
Status	M3	W/O Completed	Requested	05/28/17	
Phase	1	Project Phase 1	Planned Comp	06/18/17	
Category 02			Completed	06/18/17	
Category 03					

Equipment Listing					
Equip Clas			Qty Req'd	Est. Cost	Date Req Leadtime
01	Motors	(M)	2	500.00	05/20/17 20
06	Conveyors		1	1,000.00	05/25/17 60
17	Pressure Vessels		1	725.00	06/01/17 45

Budget Estimate				
Section		Units	Est. Cost	Date Req
01	General Requirements	1	500.00	05/20/17
11	Equipment	3	2,250.00	05/20/17
15	Mechanical	1	3,425.00	06/05/17
16	Electrical	2	3,150.00	06/10/17

Complete the following field:

- Order Number

20.7 Assigning Parts to a Work Order

You can assign parts to a work order to satisfy parts requirements for maintenance tasks. Depending on how you set up your system, you can indicate how and when the system commits inventory to satisfy a work order's parts requirements. For example, you can direct the system to commit inventory to a work order only at a particular work order status.

You can assign parts from a standard parts list that you enter when you create the work order. In addition, you can assign inventory parts that do not appear on a standard parts list, such as when you are creating a work order for an unanticipated emergency repair. You can also assign parts for which you do not maintain an inventory master, such as special order parts for which you rarely have a need. All parts inventory information applicable to a work order appears on Work Order Parts List.

Assigning parts to a work order consists of the following tasks:

- Assigning parts from a standard parts list
- Working with selected parts from inventory
- Assigning parts without an inventory master

20.7.1 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to use Work Order Parts List:
 - System 30: Product Data Management
 - System 31: Shop Floor Control

- · System 40: Inventory Base and Order Processing
- · System 41: Inventory Management
- · System 43: Procurement
- Review processing options for the [Section 27.2, "Reviewing Work Order Parts Lists"](#). See [Section 38.7, "Setting Up Standard Parts Lists and Work Order Instructions"](#)
- Verify that standard parts lists have been set up. See [Section 38.7.4, "Setting Up a Standard Parts List"](#).

See Also:

- [Appendix A, "Inventory Concepts and Setup"](#) for more information about inventory terms and concepts
- [Section 38.7.4, "Setting Up a Standard Parts List"](#) for more information about how the system commits inventory

20.7.2 Assigning Parts from a Standard Parts List

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Entry

You can assign parts to a work order from a standard parts list. This is especially useful when you create work orders for routine maintenance tasks that require identical parts.

When you assign parts from a standard parts list to a work order, you can use a processing option to specify whether the system automatically chooses the add option for all of the parts from the standard parts list, or leaves the option field blank, allowing you to include only certain parts. This is especially useful if the standard parts list is lengthy and you only need to select a few parts.

20.7.3 Before You Begin

- Verify that the following fields on Work Order Entry have been completed:
 - · Standard Parts or Instructions
 - · Start Date
- Install the following systems in order to access Work Order Parts List:
 - · System 30: Product Data Management
 - · System 31: Shop Floor Control
 - · System 40: Inventory Base and Order Processing
 - · System 41: Inventory Management
 - · System 43: Procurement

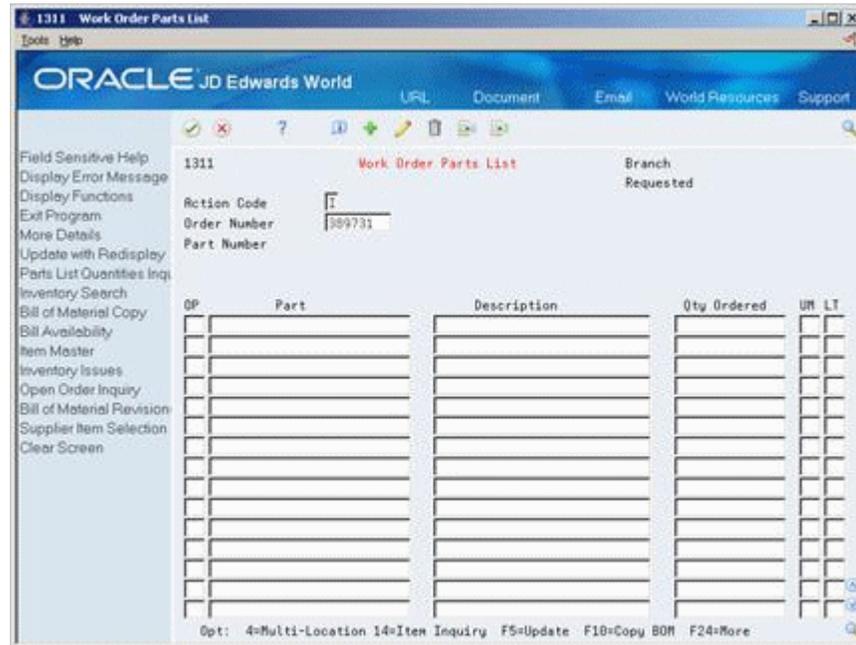
To assign parts from a standard parts list

On Work Order Entry

1. To locate a work order, complete the following field:
 - Work Order Number

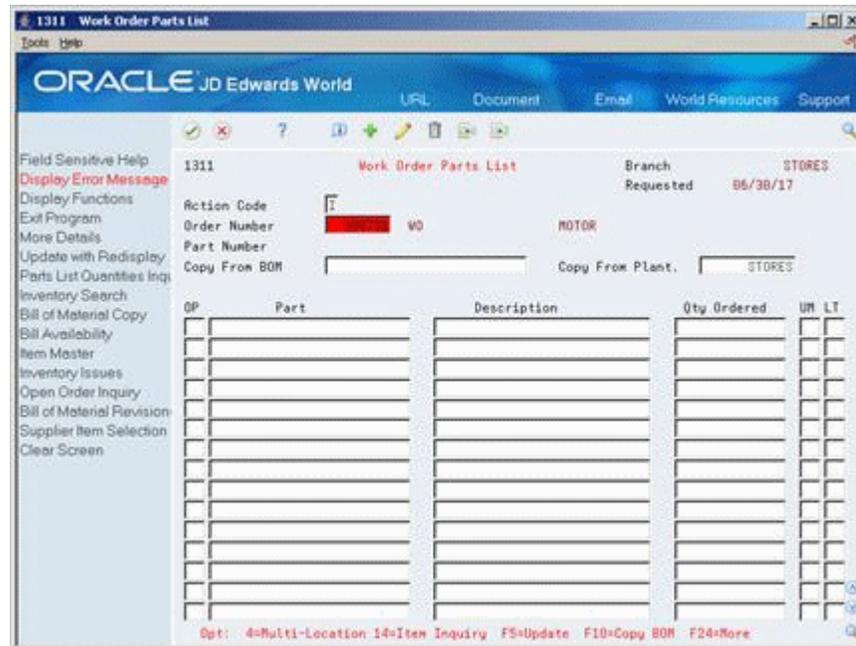
2. Choose Parts List.

Figure 20–13 Work Order Parts List screen



3. On Work Order Parts List, choose Copy BOM.

Figure 20–14 Work Order Parts List screen (showing Copy from BOM fields)



4. Review the following fields:

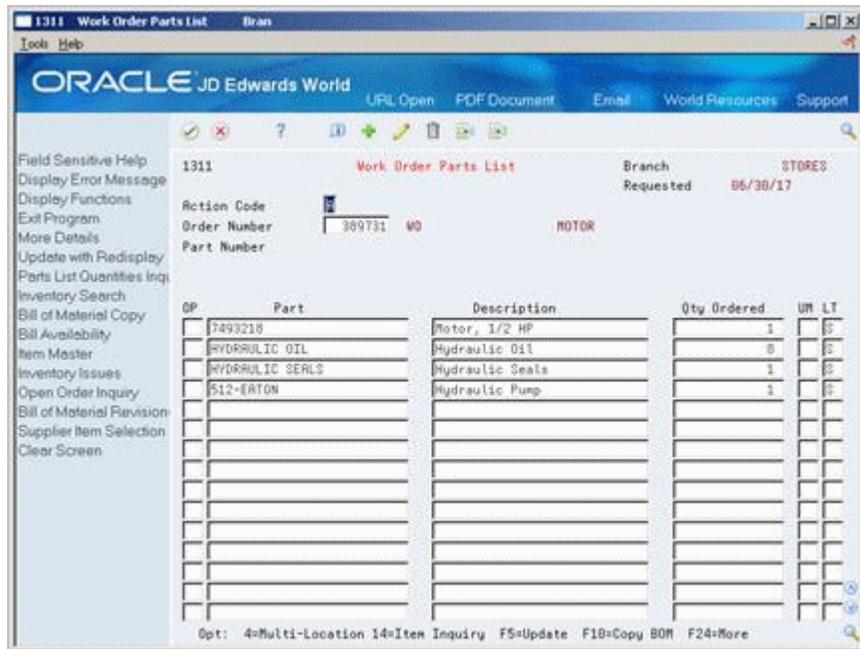
- Copy From Bill of Material
- Copy From Plant

The system assigns default values to these fields based on values from the work order.

5. Accept the default values or revise them if needed.
6. Choose Bill of Material Copy.

The system completes the Work Order Parts List screen with values from the standard parts list.

Figure 20–15 Work Order Parts List screen



7. On Work Order Parts List, choose Add Part for BOM Copy for each part you want to include on the parts list for the work order.

Depending on how you set up processing options, this option might already have been preloaded for each part from the standard parts list. If so, you can clear the option for each part that you do not want to include on the Work Order Parts List.

8. To complete the process, choose the Update with Redisplay.

Field	Explanation
Copy From BOM	<p>The item number entered which can be in any of the three formats (short, long, or 3rd item number).</p> <p><i>Form-specific information</i></p> <p>This item number is the Standard Parts List number used to create the work order parts list.</p>
Copy From Plant	<p>The destination business unit that you want to copy accounts to.</p> <p><i>Form-specific information</i></p> <p>The branch/plant that you want to copy Standard Parts List information from.</p>

Field	Explanation
LT	A code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces (General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management). It also specifies the conditions under which a line prints on reports and is included in calculations. Codes include: S – Stock item J – Job cost N – Non-stock item F – Freight T – Text information M – Miscellaneous charges and credits W – Work order

20.7.4 What You Should Know About

Topic	Discussion
Deleting parts from the parts list	You can delete individual parts from a work order parts list. Choose Delete/Cancel for each part that you no longer want to appear on the parts list.

20.7.5 Working with Selected Parts from Inventory

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Work Orders**

From **Equipment Work Orders (G1316)**, choose **Work Order Entry**

You can assign parts that do not appear on a standard parts list, such as when you are creating a work order for an unanticipated emergency repair. If you need a part that is not currently available at your location, you can search for other locations that stock the part and assign them to the work order parts list.

When a part is unavailable, you can specify a substitute part. In addition, you can add explanatory text to any part that you include on a work order parts list.

Working with selected parts from inventory includes:

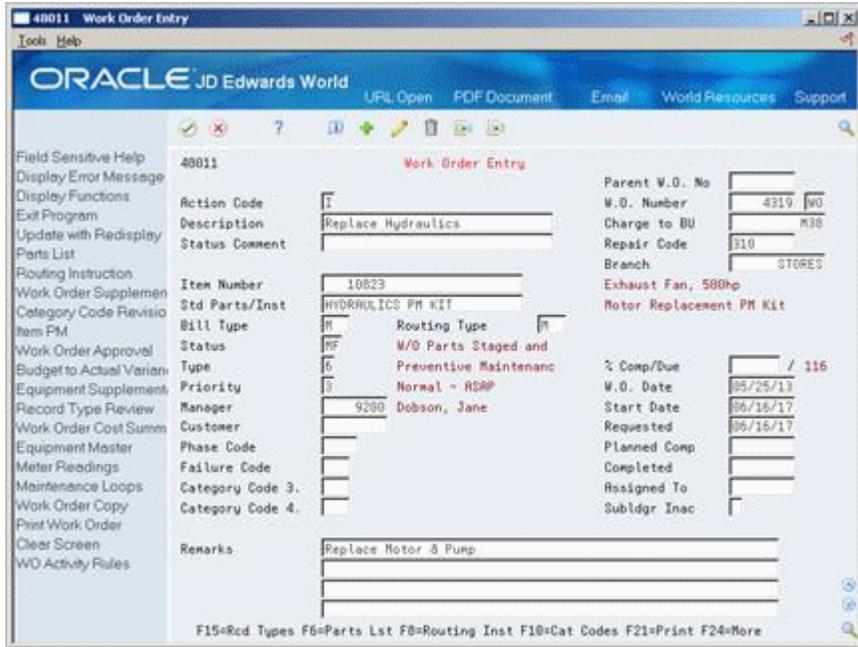
- Assigning selected parts from inventory
- Adding non-stock parts to a parts list
- Revising the location for a part
- Choosing a substitute part
- Adding explanatory text to a part

20.7.6 Before You Begin

- Set up substitute parts through the Inventory Cross Reference program. See *Setting Up Item Cross-References in the JD Edwards World Inventory Management Guide* for more information about assigning inventory cross-references.

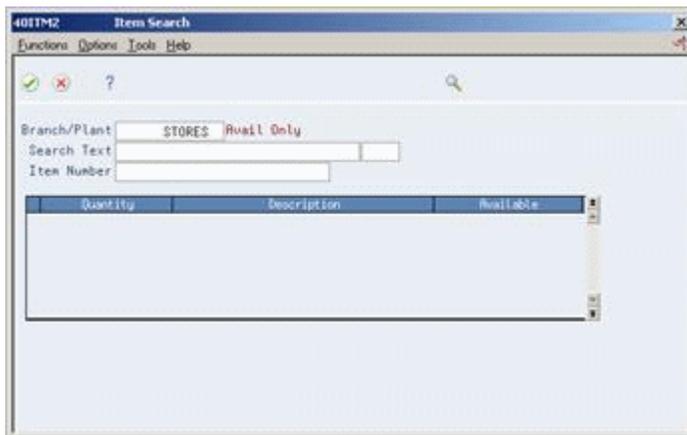
To assign selected parts from inventory
On Work Order Entry

Figure 20–16 Work Order Entry screen



1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose Parts Lst.
3. On Work Order Parts List, access the field help on the following field:
 - Part

Figure 20–17 Item Search screen



4. On Item Search, search for specific parts by entering descriptive text in the following field:
 - Search Text

5. Complete the following field next to each part that you want to add to the work order parts list:
 - Quantity
6. Choose Exit.

The system returns to the Work Order Parts List with your selection.
7. On Work Order Parts List, choose More Details.

Figure 20–18 Work Order Parts List screen

Part	Description	Qty Ordered	UM	LT
HYDRAULIC OIL	Hydraulic Oil	1	O	N
HYDRAULIC SEALS	Hydraulic Seals	1		N
7493218	Motor, 1/2 HP	1		ER S

8. Complete the following optional field:
 - Vendor

To add non-stock parts to a parts list

On Work Order Entry

1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose Parts List.
3. On Work Order Parts List, complete the following fields:
 - Part Number
 - Description
 - Quantity
 - Line Type

20.7.7 What You Should Know About

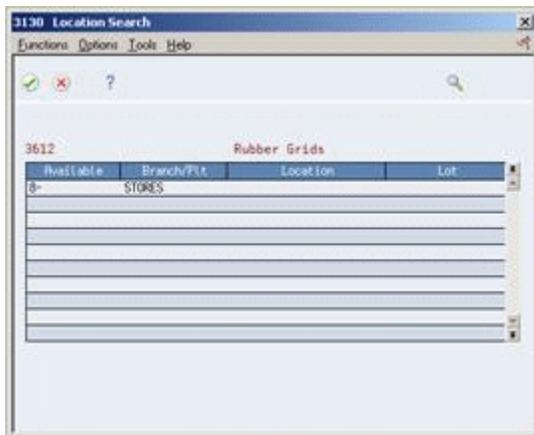
Topic	Discussion
Line types	Line types distinguish the various methods of recording stock and non-stock inventory. See Appendix A, "Inventory Concepts and Setup" for more information about line types.

To revise the location for a part

On Work Order Entry

- To locate a work order, complete the following field:
 - Work Order Number
- Choose Parts List.
- On Work Order Parts List, choose Location Search for each part you want to revise the location.

Figure 20–19 Location Search screen



- On Location Search, choose Return Value for the alternate location.
The system replaces the original location information with the new information.

20.7.8 What You Should Know About

Topic	Discussion
Multiple locations	You can specify multiple locations for a part. On Work Order Parts List, choose Multiple Location Parts Search. A window opens, showing all locations that stock the part. Select the locations that you want to add. The system adds the new locations to the parts list and updates the quantity on hand.

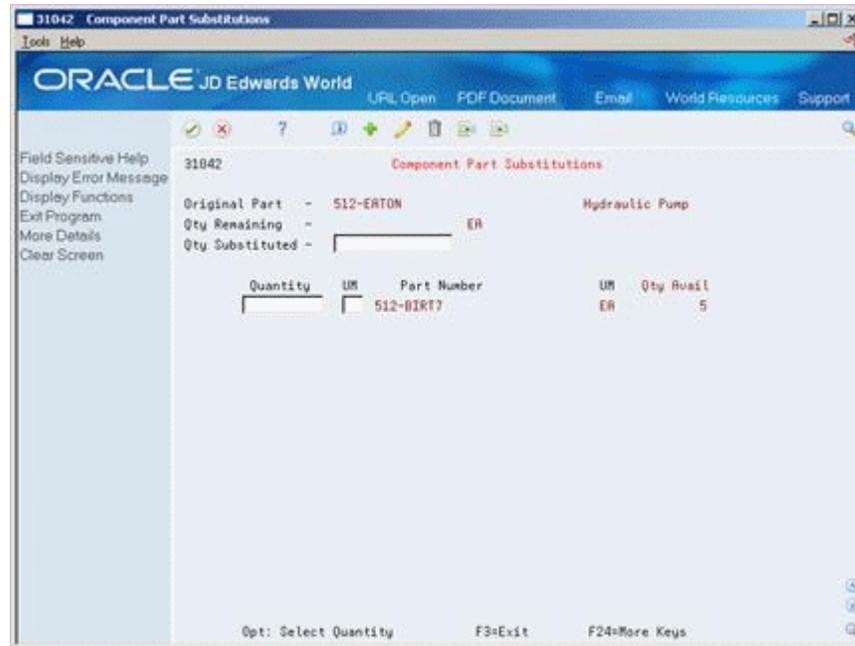
To choose a substitute part

On Work Order Entry

- To locate a work order, complete the following field:
 - Work Order Number

2. Choose Parts List.
3. On Work Order Parts List, choose Item Substitutes for each part to substitute.

Figure 20–20 Component Part Substitutions screen



4. On Component Part Substitutions, complete the following field for each part substitute:
 - Quantity

20.7.9 What You Should Know About

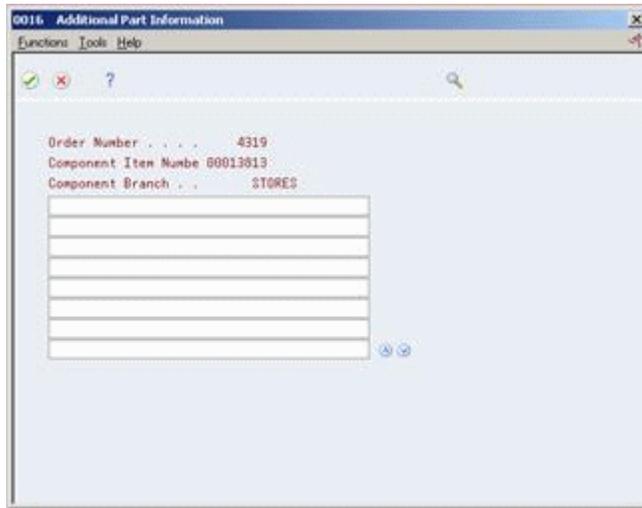
Topic	Discussion
Substitute part availability	<p>In order for a substitute part to appear on Component Part Substitution, the substitute part must have a quantity on hand in the inventory system.</p> <p>See Appendix A, "Inventory Concepts and Setup" for more information about quantity on hand.</p>

To add explanatory text to a part

On Work Order Entry

1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose Parts List.
3. On Work Order Parts List, choose Additional Part Text for each item to add text.

Figure 20–21 Additional Part Information screen



4. On Additional Part Information, enter the explanatory text.
When you enter explanatory text for a part, the system highlights the part on the work order parts list.

20.7.10 Assigning Parts without an Inventory Master

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Entry

You can assign parts for which you do not maintain an inventory master to a work order. This is especially useful to add parts for which you rarely have a need, such as special order parts, to a work order.

To assign parts without an inventory master

On Work Order Entry

1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose Parts List.
3. On Work Order Parts List, complete the following fields:
 - Part
 - Description
 - Quantity
 - LT (Line Type)
4. Complete the following optional field:
 - Unit of Measure
5. Choose More Details.
6. Complete the following optional fields:

- Vendor
- Unit Cost

20.8 Assigning Labor Routing to a Work Order

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Entry

You can specify which work center is responsible for each maintenance task on a work order. You can specify the sequence of operations for each task, as well as the labor rates and the number of hours necessary to complete each task.

You can assign labor routing instructions to a work order using the following methods:

- Copy labor routing information from standard instructions
- Manually assign labor routing instructions

When you know in advance the labor requirements for a particular task, you can set up standard routing instructions for the task. You can copy from the instructions when you need to assign labor routings for similar tasks.

You can manually assign labor routing instructions for any maintenance task for which you have not set up standard routing instructions.

20.8.1 Before You Begin

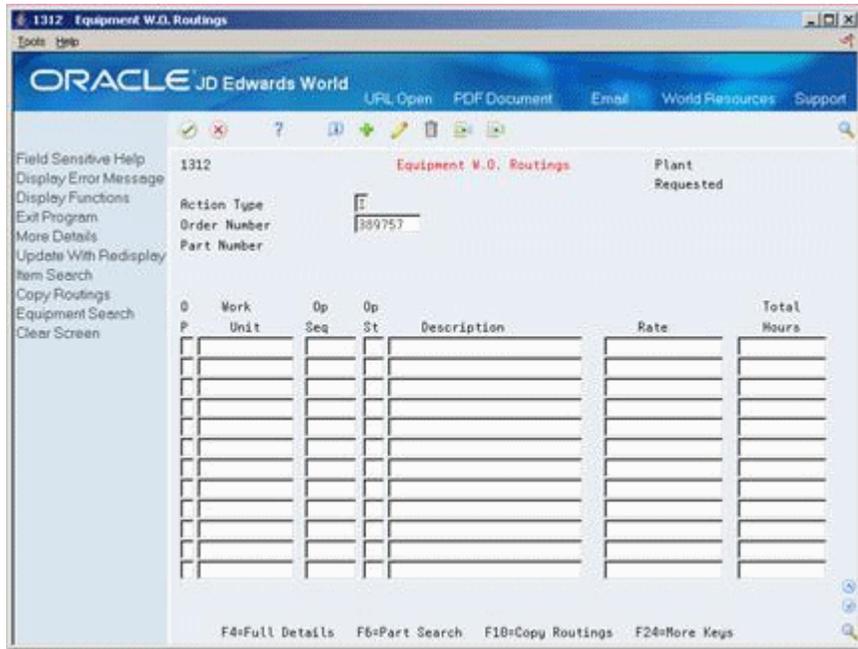
- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to use Equipment Work Order Routings:
 - · System 30: Product Data Management
 - · System 31: Shop Floor Control
 - · System 40: Inventory Base and Order Processing
 - · System 41: Inventory Management
 - · System 43: Procurement
- Review processing options for the Equipment Work Order Routings program. See [Section 38.7.1, "Revising Processing Options for Parts Lists and Labor Routings"](#)
- Verify that the following fields on Work Order Entry are complete:
 - · Standard Parts or Instructions
 - · Start Date

To copy labor routing information from standard instructions

On Work Order Entry

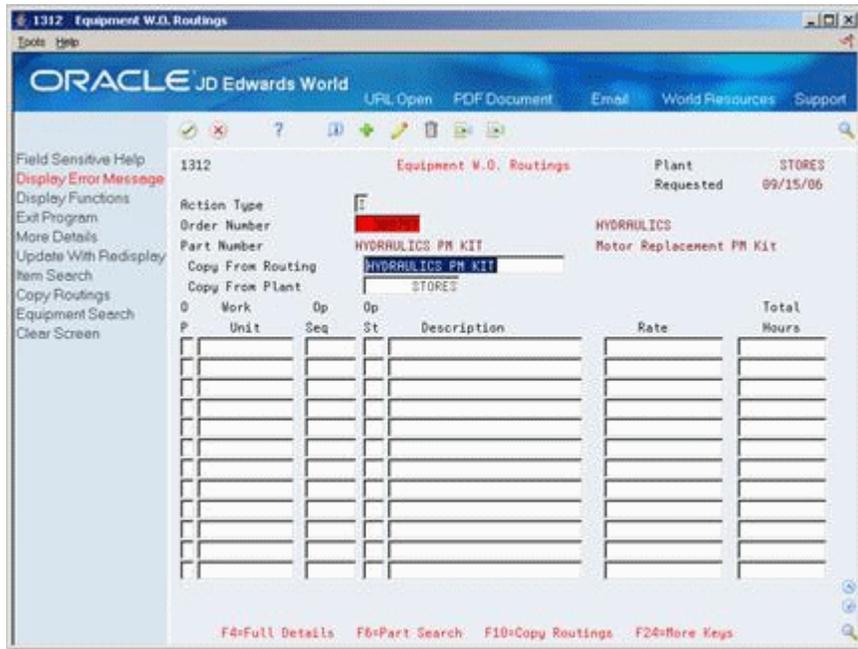
1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose Routing Instructions.

Figure 20–22 Equipment W. O. Routings screen



3. On Equipment Work Order Routings, choose Copy Routings.

Figure 20–23 Equipment W. O. Routings screen (showing Copy from Routings fields)



4. Review the following fields and revise them if needed:
 - Copy From Routings
 - Copy From Plant
5. Choose Copy Routings.

The system completes the Equipment Work Order Routings screen with values from the standard instructions.

Figure 20–24 *Equipment Work Order Routings screen (showing completed fields)*

Work Unit	Op Seq	Op St	Description	Rate	Total Hours
ELECT	1.00		Lockout		.25
ELECT	2.00		Disconnect motor & dispos		.50
MECH	3.00		Replace seals		1.00
MECH	4.00		Fill hydraulic oil		.50
ELECT	5.00		Install new motor		.50
ELECT	6.00		Unlock		.25

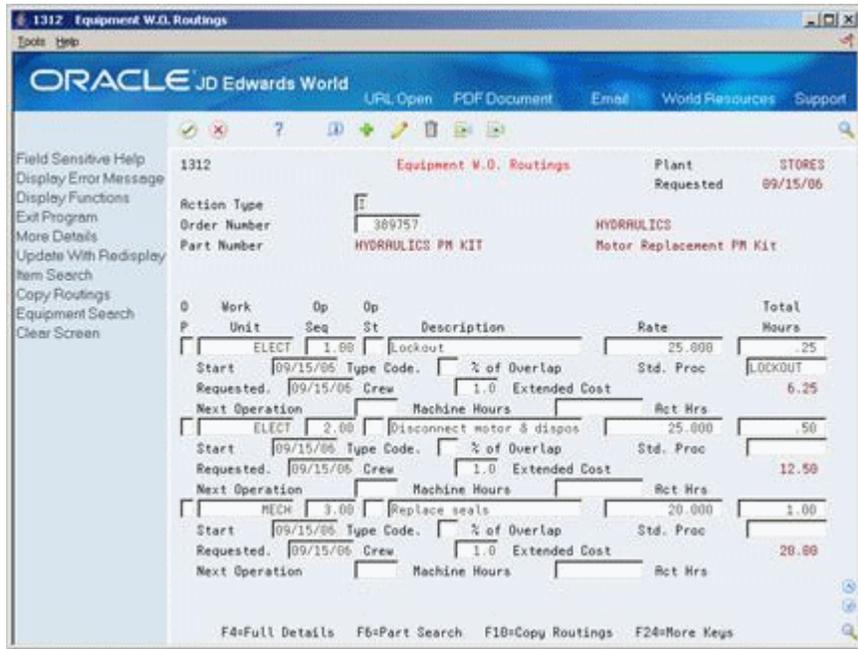
6. On Standard Instructions, revise any information that does not apply to the current work order.
7. To complete the process, choose Update with Redisplay.

To manually assign labor routing instructions

On Work Order Entry

1. To locate a work order, complete the following field:
 - Work Order Number
2. Choose Routing Instructions.
3. On Equipment Work Order Routings, complete the following fields for each labor routing that you want to establish:
 - Work Unit
 - Operation Sequence
 - Description
 - Total Hours
4. Complete the following optional fields:
 - Operation Status
 - Rate
5. Choose More Details.

Figure 20–25 Equipment W. O. Routings screen (Details area)



6. Complete the following optional fields:

- Start Date
- Requested Date
- Standard Procedures

These fields might contain default values.

7. Complete the following optional fields:

- Percent of Overlap
- Crew Size

Field	Explanation
Op St	A user defined code (31/OS) that identifies the current status of a work order or engineering change order as the operation steps in the routing are completed.
Rate	This is the rate used to estimate the labor cost of a routing step. The system derives this rate from frozen standard rates.
Std. Proc	A user defined code (system 48, type SN) that is assigned to a standard note, message, or general narrative explanation. You can use this code to add instructional information to a work order. You set up codes for this field on Standard Description.

Field	Explanation
Work Unit	<p>An alphanumeric field 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, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p> <p><i>Form-specific information</i></p> <p>Use this field to identify the craft or resource (business unit) that will perform the maintenance task.</p>
Op Seq	<p>In routings, this number is used to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.</p> <p>In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Control system uses this field in the backflush/preflush by operation process.</p> <p>In engineering change orders, this number is used to sequence the assembly steps for the engineering change.</p> <p>Skip To fields allow you to enter an operation sequence that you want to begin the display of information.</p> <p>You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.</p> <p><i>Form-specific information</i></p> <p>You can use this field to sequence the maintenance tasks to perform in the maintenance of an item.</p>
Requested	<p>The date that an item is to arrive or that an action is to be complete.</p> <p><i>Form-specific information</i></p> <p>The system enters a default value based on the work order start date.</p>
Start	<p>This is a start date that you can enter, or an automatic start date which the planning system calculates using a backcheduling routine. The routine starts with the required date and offsets the total lead time to calculate the appropriate start date.</p> <p>This system enters a default date from system date or you can enter a date.</p> <p><i>Form-specific information</i></p> <p>This is the date the system schedules the work order activity to begin. The system enters a default value based on the work order start date.</p>

Field	Explanation
% of Overlap	<p>The overlapping of successive operations. The actual overlap percentage entered for the operation sequence is the percent by which that operation overlaps the prior operation. For example, if you enter 80%, this indicates that work can begin on the overlapped operation when 20% of the prior operation is completed.</p> <p>Overlapping has no effect on move and queue calculations.</p> <p>The percent entered must be less than or equal to 100%.</p> <p>Note: Enter percents as whole numbers: 5% as 5.00</p>
Crew	<p>The number of people who work in the specified work center or routing operation.</p> <p>The system multiplies the Run Labor value in the Routing Master table (F3003) by crew size during costing to generate total labor dollars.</p> <p>If the Prime Load Code is L or B, the system uses the total labor hours for backscheduling. If the Prime Load Code is C or M, the system uses the total machine hours for backscheduling without modification by crew size.</p> <p><i>Form-specific information</i></p> <p>If you leave this field blank, the system enters a value based on the Work Center Master table (F30006) for the work unit.</p>

20.8.2 What You Should Know About

Topic	Discussion
Labor rates	<p>The system uses the frozen standard labor rate to calculate the rate for each labor routing step. You define the frozen standard labor rate when you set up work centers.</p> <p>See Section 39.4.1, "Setting Up Resource Units".</p>
Crew size	<p>If you do not enter a crew size, the system assigns a value based on the crew size specified in the Work Center Master table (F30006).</p>
Machine hours and capacity planning	<p>You can use routing instructions to assist in capacity planning for downtime machine hours due to a maintenance work order. This is especially useful to review the capacity for a machine for both production and maintenance work orders.</p> <p>You must first specify a manufacturing work center on the equipment master for which the work order applies. The system includes this work center as a final routing instruction and totals the duration of the previous routing steps to determine the machine hours that are required for the work order.</p> <p>See Chapter 3, "Create an Equipment Master."</p>

20.9 Copying a Work Order

Navigation

From Equipment/Plant Management (G13), choose **Equipment Work Orders**

From Equipment Work Orders (G1316), choose **Work Order Entry**

When you have an existing work order with information that is applicable to other work orders, you can copy it using Copy Work Order. For example, you might need to perform maintenance on a machine that is similar to the maintenance you performed on another machine. Instead of creating a new work order, you can copy the work order for the previous maintenance. When you copy an existing work order, the system assigns a unique number to the new work order. Otherwise, the following information remains unchanged:

- All information from the Work Order Entry screen
- Parts instructions
- Labor routing instructions
- Record types

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

You can use the following methods to copy a work order:

- Copy a work order using an existing work order
- Create a work order based on a parent work order

To copy a work order using an existing work order

On Work Order Entry

1. Complete the following field to locate a work order:
 - Work Order Number
2. Choose Copy Work Order.

A new work order displays, identical to the one that you copied, but with a unique work order number. The system copies parts, routing instructions, and record types from the original work order to the new work order.

To create a work order based on a parent work order

On Work Order Entry

1. Complete the following fields:
 - Parent Work Order Number
 - Description
 - Branch
 - Equipment Number
2. Complete all of the fields that must contain unique information rather than the default information that the system provides from the parent work order.
3. Complete the following optional field:
 - Completed Date
4. To create the new work order, choose Update with Redisplay.

After you have created the new work order, assign estimated costs to the work order, if necessary. You can then assign any additional category codes and record type information to that added by the system from the parent work order.

See Also:

- [Chapter 20.3, "Assigning Estimated Costs to a Work Order"](#)
- [Chapter 20.4, "Assigning Category Codes to a Work Order"](#)
- [Chapter 20.5, "Adding Text to a Work Order"](#)

20.10 Creating a Work Order for Unscheduled Maintenance

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Backlog Management

When you have set up maintenance tasks to come due on an as-needed basis rather than a scheduled interval, you can notify the system when you want to create a work order to perform the tasks. For example, you might want to wash a piece of equipment only when it is in the shop for other maintenance.

Note: When you create a work order for unscheduled maintenance, the system runs the XJDE001 version of the PM Update program. The default values for this version ensure that the system updates the maintenance status and PM schedule for only the equipment for which the unscheduled maintenance task applies. JD Edwards World recommends that you do not change the processing options for this version.

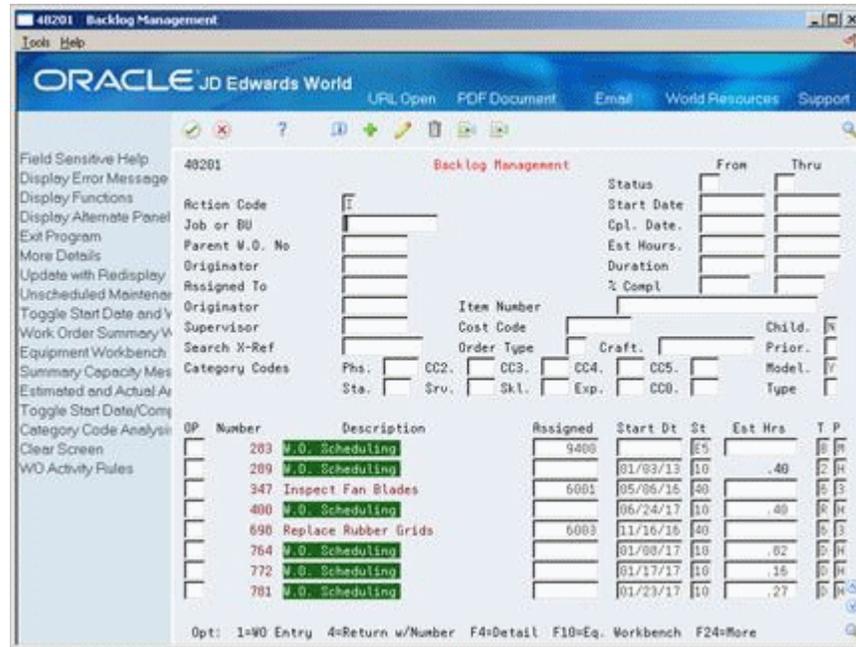
20.10.1 Before You Begin

- Set up a PM service type for each unscheduled maintenance task and verify that the service type has no schedule date or service interval. See [Chapter 15.1, "Creating a PM Schedule"](#) for more information about setting up service types.

To create a work order for unscheduled maintenance

On Backlog Management

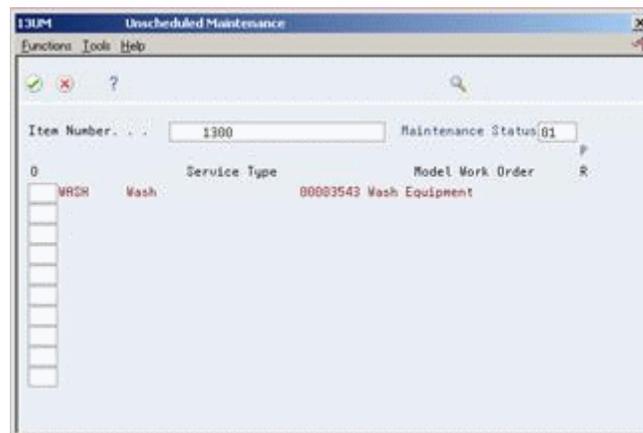
Figure 20–26 Backlog Management screen



1. Complete the following field to locate a piece of equipment:
 - Equipment Number
2. Choose **Unscheduled Maintenance**.

The **Unscheduled Maintenance** window appears, showing all unscheduled maintenance procedures that are set up for the equipment.

Figure 20–27 Unscheduled Maintenance screen



3. Choose **Create Work Order**.

The system updates the PM schedule to indicate the maintenance as 100 percent due and generates the corresponding work order.

20.10.2 What You Should Know About

Topic	Discussion
Accessing the Unscheduled Maintenance window	You can access the Unscheduled Maintenance window from Equipment Backlog or Backlog Management.

See Also:

- [Chapter 23.2, "Locating Work Orders"](#) or the processing options for this program

Set Up a Project

This chapter contains this topic:

- [Section 21.1, "Setting Up a Project"](#)

21.1 Setting Up a Project

Navigation

From Work Order/Service Billing Processing (G48), choose Simple Project Management

From Simple Project Management (G4812), choose Project Setup

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

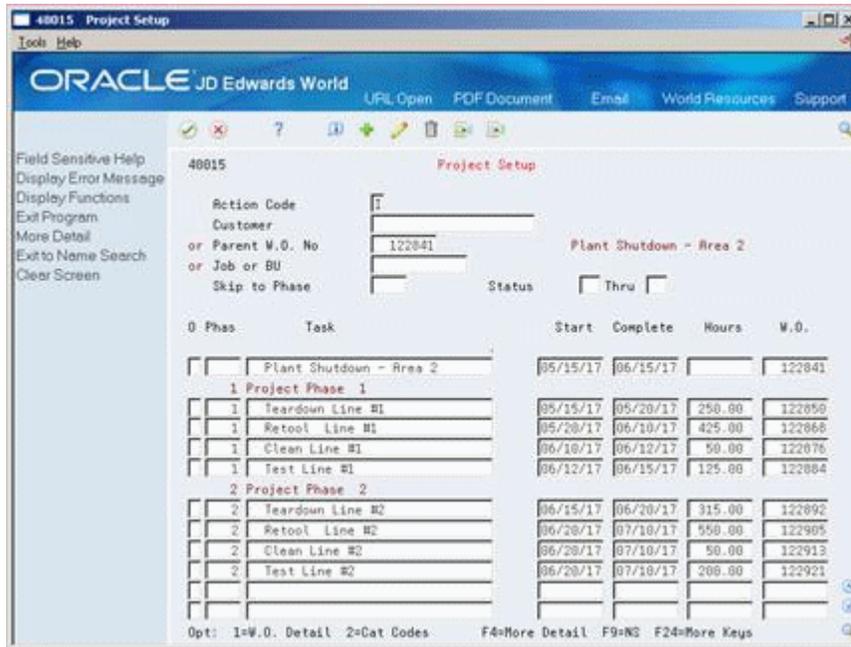
Setting up a project is similar to creating work orders using parent information. However, by using Project Setup to create the work orders, you can create several work orders at the same time and group them into a hierarchy under an existing (parent) work order. The parent work order represents the project, and each work order assigned to the parent represents a task in the project.

The system automatically enters basic work order information, category codes, and record type information from the parent work order to each work order in the project. After you create the project hierarchy, you can enter specific information for each work order by accessing the Work Order Entry screen. You can use processing options to specify which Work Order Entry screen the system displays when you add additional work order information.

To set up a project

On Project Setup

Figure 21–1 Project Setup screen



1. To identify the project, complete the following fields:
 - Parent W.O. Number
 - Customer (optional)
 - Job or BU (optional)
2. To describe each step of the project, complete the following field:
 - Task
3. To further define each step of the project, complete the following optional fields:
 - Start (Date)
 - Complete (Date)
 - W.O. (Number)
 - Phas (Phase)
 - Hours
4. Choose More Detail.

Figure 21–2 Project Setup screen (Detail area)

5. Complete the following optional fields:
- Std. Desc. (Standard Description)
 - Manager

Field	Explanation
Parent W.O. No	This is the parent work order number. You can use this number to: <ol style="list-style-type: none"> 1. Enter default values for newly added work orders, for example, Type, Priority, Status, or Manager. 2. Group work orders for project setup and reporting
Hours	The estimated hours that are budgeted for this work order.
Manager	The address book number of a manager or planner. Note: A processing option for some screens allows you to enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors screen. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. You can either accept or override the default value.

21.1.1 What You Should Know About

Topic	Discussion
Adding additional work order information	You can add additional information to each work order within the project. For example, you can add status comments or an extended description of the task. Choose Work Order Detail for each work order for which you want to add information.

21.1.2 Processing Options

See [Section 55.2, "Default Values for Speed Project Setup \(P48015\)"](#)

Review and Approve Work Orders

This chapter contains these topics:

- [Section 22.1, "Reviewing and Approving Work Orders"](#)
- [Section 22.2, "Approving a Work Order"](#)
- [Section 22.3, "Reviewing the Approval History of a Work Order"](#)

22.1 Reviewing and Approving Work Orders

You can review, approve, or reject a work order. When you approve a work order, the system sends an electronic mail message to the next person on the work order approval route. When you reject a work order, the system sends an electronic mail message to the person who requested the work order.

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

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

22.2 Approving a Work Order

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Processing

From Work Order Processing (G1317), choose Work Order Approval

After you enter the information to create a work order, the system sends an electronic mail message to notify the person responsible for approving the work order that they have a work order to review. Use Work Order Approval to review and approve work orders.

When you access Work Order Approval, the system automatically enters your address book number in the Approver Number field and displays a description of the work orders for which you are responsible for approving. You can use processing options to limit the work orders that display according to:

- Order type (document type)
- Work order type
- Approval type

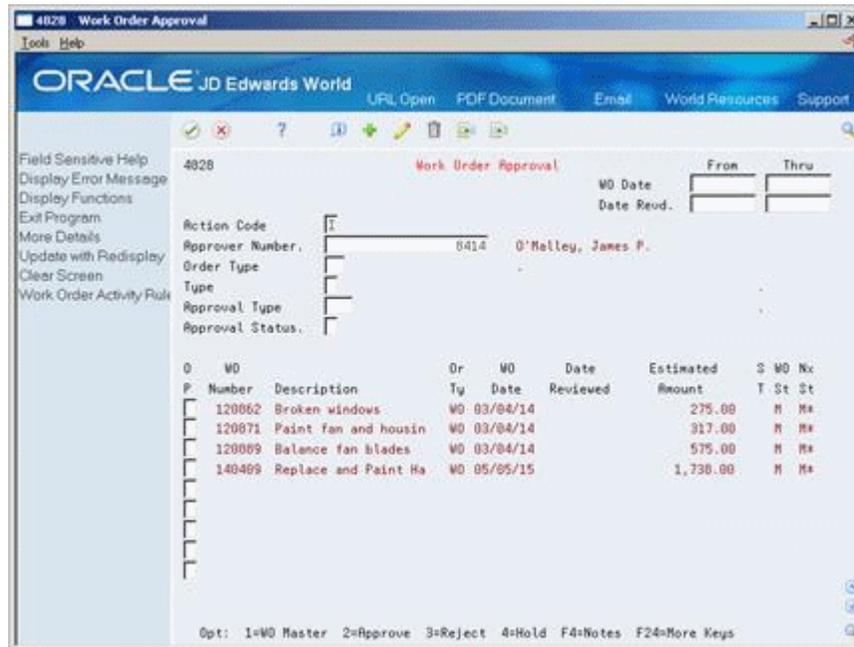
22.2.1 Before You Begin

- Verify that all work order approvers are included in the work order approval routing. See [Section 38.5.5, "Setting Up Work Order Approval Routes"](#)

To approve a work order

On Work Order Approval

Figure 22–1 Work Order Approval screen



- Complete the following fields:
 - Type
 - Approval Type

These fields might already contain default values.
- To limit your search to specific work orders, complete the following optional fields:
 - Order Type
 - Approval Status
 - WO Date From/Thru
 - Date Revd. (Reviewed) From/Thru
- Choose Approve, Reject, or Hold.
- To complete the process, enter your password.

Field	Explanation
Approval Type	A user defined code (system 48, type AP) indicating the type of work order approval path that a work order follows. You can use processing options to specify a default approval type based on the type of work order.

Field	Explanation
Approval Status	A code that limits the display of work orders according to their approval status. A – Display approved only R – Display rejected only H – Display held only * – Display all work orders blank – Display new records

22.2.2 What You Should Know About

Topic	Discussion
Reviewing details about specific work orders	You can access the work order master directly from the Work Order Approval screen when you need to review details about the work order. Choose Work Order Master from Work Order Approval.
Adding an explanation	You can enter a brief explanation regarding your approval decision. Choose Notes from Work Order Approval.
Passwords	Your password for this program is based on your user ID number. See Section 38.5.7, "Setting Up Work Order Approver Profiles" .
Approving a work order from Message View/Entry	You can access Work Order Approval directly from Message View/Entry. When a work order requires your approval, the system sends an electronic mail message (JDE4805) that requests your approval. After you review the work order approval request, choose Requisition Approval. The system displays Approval Audit/Review, from which you can approve the work order.

22.2.3 Processing Options

See [Section 55.3, "Work Order Approval \(P4828\)"](#)

22.3 Reviewing the Approval History of a Work Order

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Processing

From Work Order Processing (G1317), choose Approval Audit/Review

You can use Approval Audit/Review to review the approval history of a work order. When you enter the number of a work order, the system displays:

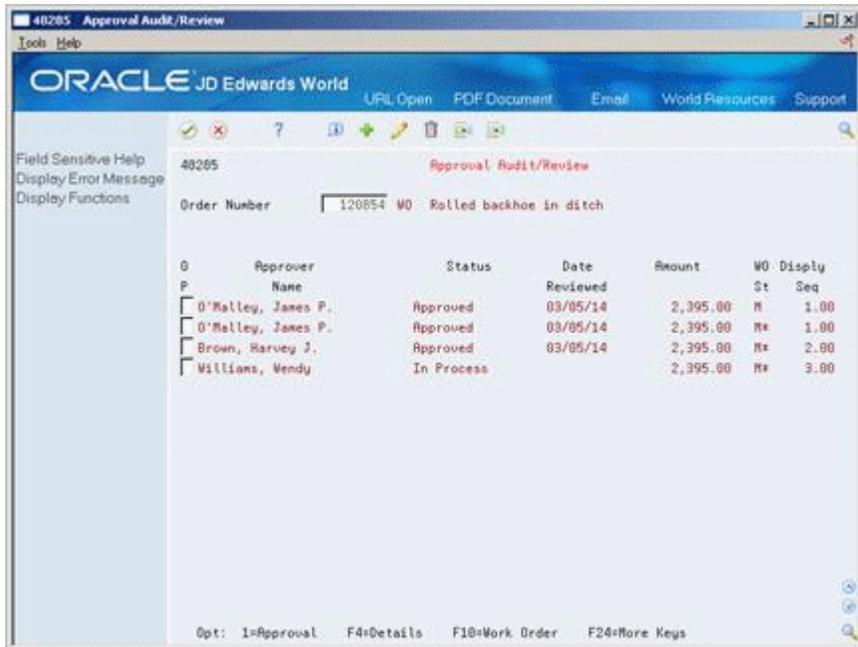
- A list of all the people that must approve the work order
- The date that the work order was approved or reviewed
- The status of the work order, such as approved or in process

You can also review any notes that an approver might have recorded when approving, rejecting, or holding a work order.

To review the approval history of a work order

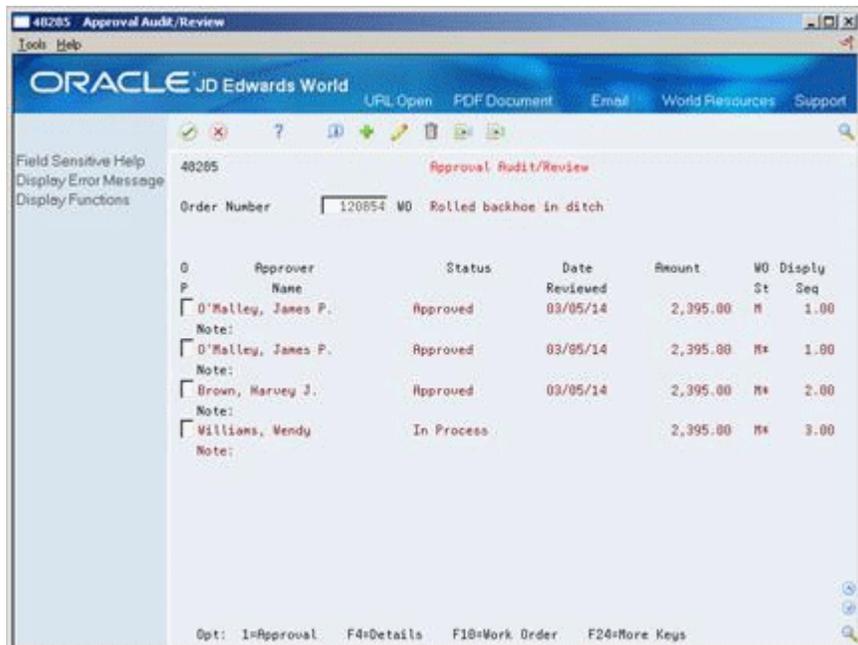
On Approval Audit/Review

Figure 22–2 Approval Audit/Review screen



1. Complete the following field:
 - Order Number
2. To review any notes the approver might have recorded for the work order, choose Details.

Figure 22–3 Approval Audit/Review screen (Details area)



3. To review additional information about the work order, choose Work Order Master.

22.3.1 What You Should Know About

Topic	Discussion
Locating a work order	If you don't know the number of the work order that you want to review, you can search for it with Backlog Management. Access the field help for Work Order Number to display Backlog Management. See Section 23.2.1, "Locating Work Orders Using Backlog Management" .

Work with Work Orders

This chapter contains these topics:

- [Section 23.1, "Working with Work Orders"](#)
- [Section 23.2, "Locating Work Orders"](#)
- [Section 23.3, "Revising Work Orders"](#)
- [Section 23.4, "Printing Work Orders"](#)

23.1 Working with Work Orders

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

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

23.2 Locating Work Orders

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Backlog Management

You can use a variety of search criteria to locate work orders in your maintenance organization. You can locate work orders using Backlog Management or Equipment Backlog. The method that you choose depends on the information that you know about the work orders you want to locate, as well as the tasks that you want to perform after you locate the work orders.

Locating work orders consists of the following tasks:

- Locating work orders using Backlog Management
- Locating work orders using Equipment Backlog

You can use Backlog Management or Equipment Backlog to complete multiple tasks with a single work order. For example, after you locate a work order using Backlog

Management, you can access Work Order Parts List, a program that allows you to make revisions to the parts list without returning to the Equipment/Plant Maintenance menu.

You can access the following review and analysis screens directly from either Backlog Management or Equipment Backlog.

Figure 23–1 Work Order Summary Window

Work Orders	Total Est Hrs	Total Hours	Avg. Hours
126	3,404.50		

Figure 23–2 Estimated and Actual Window

	Estimated	Actual	Difference
Work Orders		126	
Hours	3,404.50		3,404.50
Labor Cost			
Material Cost			
Other Cost	116,352.21		116,352.21
<hr/>			
Total	116,352.21		116,352.21

Figure 23-3 Equipment Backlog screen

13220 Equipment Backlog

Tools Help

ORACLE JD Edwards World UPL Open PDF Document Email World Resources Support

13220 Equipment Backlog W.O. Typ / Pri * *

13CCR Category Code Analysis

Category Code	Fail Type	Work Orders	Actual Downtime	Actual Hours	Actual Labor Cost	Actual Material Cst	Total Cost
F1		3					
F2		4					
F4		3					
F6		2					
F8		1					

1906 Honda Accord 3800 mil 1922 RR
 1994 250 HR Maint-1906 140 1940 RR
 2006 250 HR Maint Proc 1942 RR
 4052 Paint Railings and Fl 1221 RE

Opt:1=W.O. Entry 2=Item Master 4=Return Number F10=Workbench F24=More Keys

The following graphic shows many of the screens and functions that you can access when you use Backlog Management or Equipment Backlog.

Figure 23-4 Screens and Functions Available when Using the Backlog Management or Equipment Backlog



Search for Work Orders by:

- * Equipment Number
- * Work Order Dates
- * Category Codes
- * Address Number
- * Job or Shop



Exit To:

- * Work Order Inventory Issues
- * Unscheduled Maintenance
- * Capacity Messages
- * Work Order Analysis Windows
- * Completed PM
- * Work Order Master
- * Work Order Approval
- * Work Order Parts List and Labor Routings
- * Open Order Inquiry
- * Projected Setup
- * Parent Work Order Cost
- * Work Order Cost
- * Budget to Actual Variance

23.2.1 Locating Work Orders Using Backlog Management

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Backlog Management

Use Backlog Management to review work order information that is not specific to a piece of equipment or a category of equipment. When you use Backlog Management, you can use any combination of the information shared among work orders as search criteria to locate them. For example, you can locate all the work orders for a business unit that are assigned to a particular supervisor.

You can specify that the system locate work orders for a parent piece of equipment or the parent and all of its child components.

Information that you can use to locate work orders with Backlog Management includes:

- A job or business unit

- A subsidiary or cost code
- Equipment for which the work orders apply
- The work center or craft to which work orders are assigned
- The estimated hours and duration of the work orders
- The person who originated the work orders
- The manager or supervisor of the work to be performed
- Any combination of the user defined information associated with the work orders, such as category codes and work order type
- Any of the dates associated with the work orders, such as start date and planned completion date

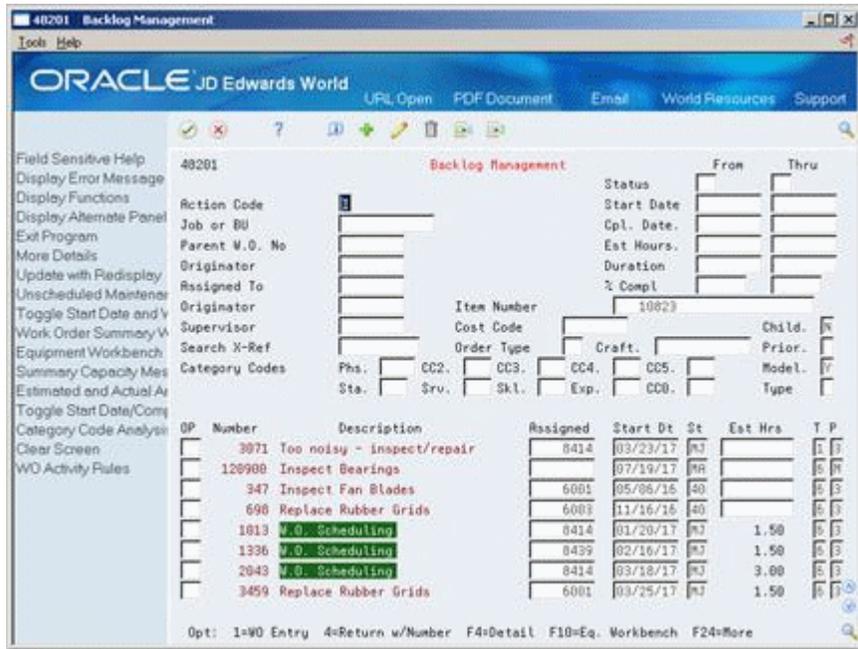
Some of the tasks that you can perform from Backlog Management include:

- Updating the start date and status of a work order
- Creating a work order for unscheduled maintenance
- Reviewing the work order activity rules
- Reviewing labor capacity messages
- Reviewing a summary of equipment failures and downtime
- Reviewing or revising work order text
- Reviewing a summary of estimated and actual work order costs
- Reviewing a summary of selected work orders that displays:
 - The number of work orders that meet your criteria
 - The estimated hours to complete all of the work orders
 - The estimated average number of hours needed to complete each work order
- Approving work orders
- Reviewing the approval history of a work order
- Reviewing parts and labor routing instructions
- Reviewing open purchase orders for work orders
- Issuing parts to a work order
- Printing work orders

To locate work orders using Backlog Management

On Backlog Management

Figure 23–5 Backlog Management screen



To limit your search to specific work orders, complete any combination of fields in the header portion of the screen.

23.2.2 What You Should Know About

Topic	Discussion
Alternate display formats	<p>Display formats specify the detail information that the system displays on the first detail line for each work order. Depending on the display format that you choose, you can update different work order information directly from Backlog Management without accessing the detail portion of the screen. For example, different formats allow you to update information, such as:</p> <ul style="list-style-type: none"> ■ The person assigned to perform the work ■ Start date ■ Estimated hours <p>Choose the Display Alternate Panel Format function to toggle between formats.</p>

23.2.3 Processing Options

See [Section 55.15, "Scheduling Workbench - Equipment Entry \(P48201\)"](#)

23.2.4 Locating Work Orders Using Equipment Backlog

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Equipment Backlog

Use Equipment Backlog to review and analyze work order information for a particular piece of equipment or group of equipment. When you use Equipment Backlog, you can use any combination of information shared by equipment, such as equipment category codes, responsible business unit, location, and so on. For example, you might want to analyze all failures associated with your heavy equipment. You can locate all work orders associated with equipment class 30 (Heavy Equipment), or you can further narrow your search to only type 5 (Emergency) work orders for heavy equipment. The more information you enter, the more quickly you can narrow your search to specific work orders.

After you locate a work order or group of work orders, you can perform a variety of tasks. For example, you can:

- Review a summary of selected work orders that displays:
 - · The number of work orders that meet your criteria
 - · The estimated hours to complete all of the work orders
 - · The estimated average number of hours needed to complete each work order
- Review a summary of equipment failures and downtime.
- Access a work order master.
- Review a summary of estimated and actual work order costs.
- Review purchase order information for parts and materials.
- Create a work order for unscheduled maintenance.

To locate work orders using Equipment Backlog

On Equipment Backlog

Figure 23–6 *Equipment Backlog screen*

W.O. Number	Work Order Description	Item Number	W.O. Complete St	Date	Actual Hours
3071	Too noisy - inspect/r		10023	MJ 03/23/17	
120900	Inspect Bearings		10023	MR	
347	Inspect Fan Blades		10023	40 05/06/16	
590	Replace Rubber Grids		10023	40 11/16/16	
1013	Inspect Bearings		10023	MJ 01/20/17	
1396	Replace Rubber Grids		10023	MJ 02/16/17	
2043	Replace Hydraulics		10023	MJ 03/10/17	
3459	Replace Rubber Grids		10023	MJ 03/25/17	

To limit your search to work orders associated with specific pieces of equipment, complete any combination of fields in the header portion of the screen.

23.2.5 Processing Options

See [Section 55.4, "Equipment Scheduling Workbench \(P13220\)"](#)

23.3 Revising Work Orders

You can revise information about your work orders as they move through the life-cycle. For example, you can change the start date of the work order if you do not have the labor resources or parts to complete the maintenance task. You can revise a variety of other information, including:

- Life-cycle statuses
- Planned completion dates
- Percentage of work completed
- Work order priority

You can use Backlog Management to revise identical information shared by multiple work orders. You use search criteria to narrow your search to the specific work orders that you want to revise. This is especially convenient when you need to revise a single field, such as Status, for a group of similar work orders.

Note: If you already know the work order number, you can quickly revise work order information on Enter Work Orders.

Revising work orders consists of the following tasks:

- Updating the life cycle information of a work order
- Revising the detail information of a work order

23.3.1 Updating the Life Cycle Information of a Work Order

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Backlog Management

The life cycle of a work order includes the steps or statuses through which a work order must pass in order to accurately communicate the progress of the maintenance tasks it represents. For example, the life cycle of a work order can include statuses that indicate:

- Work order entered
- Work order pending review
- Waiting for parts
- Work in progress

When you have completed all of the tasks requested on a work order, you can change the work order's status to complete. Depending on how you set processing options for Work Order Entry, when you change the status of a work order to complete, the system provides a warning message that alerts you to any open purchase orders associated with the work order.

Whenever you change the status of a work order, the system automatically calculates the current meter readings for the piece of equipment associated with the work order

and updates the status history table (F1307). This allows you to track the statistical units for a piece of equipment at every change in the work order's status.

To update the life cycle information of a work order

On Backlog Management

1. To limit your search to work orders associated with specific pieces of equipment, complete any combination of fields in the header portion of the screen.
2. Choose W.O. Entry.
3. On Work Order Entry, update the following field:
 - Status
4. Enter C in the following field:
 - Action Code

Figure 23–7 Status Change Date and Time screen

5. On Status Change Date and Time, complete the following optional fields to override any default values that the system provides:
 - Beginning Date
 - Beginning Time
6. Complete the following optional field:
 - Remark

Field	Explanation
Status	A user defined code (system 00, type SS) that describes the status of a work order.

23.3.2 What You Should Know About

Topic	Discussion
Overriding the completion date on a completed PM	<p>When you complete a work order associated with a PM, the system uses the completion date from the work order as the completion date for the PM. The system uses the system date as the default work order completion date. Occasionally, you might need to indicate a completion date that is prior to the system date.</p> <p>For example, assume that you complete maintenance on a piece of equipment but postpone entering the information into the system until a later date. You want your maintenance records to reflect the date that the work was actually completed. When you change the status of the work order to complete, you can override the system date on the Status Change Date and Time window.</p> <p>If the date that you enter overlaps the system date, a warning message appears, but does not prevent you from making the change.</p>
Closing a work order	<p>You can close a work order to prevent transactions from being entered against the work order. To close a work order, enter a value other than blank in the Subledger Inactive field on the work order master.</p> <p>See Section 42.2, "Updating Work Order Cost" for more information about the Update Work Order Cost program.</p>
Automatically assigning a completed date	<p>The Completed Date field is controlled by the Work Order Activity Rules. You can use the lock field is used to populate the Completed Date based on the status of the work order.</p>

See Also:

- [Section 42.3, "Updating Work Order Status Based on Purchase Order Receipt"](#)

23.3.3 Revising the Detail Information of a Work Order

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Backlog Management

You can revise the information in any of the fields on Backlog Management except the following:

- Work Order Number
- Description
- Equipment Number

If you use work order approvals, you might not be able to revise some life-cycle statuses, depending on how your system is set up.

To revise the detail information of a work order

On Backlog Management

1. Follow the steps to locate a work order or group of work orders.

2. Revise the following fields, if necessary:
 - Status
 - Start Date
 - Estimated Hours
 - Type
 - Priority
3. Choose Detail.

Figure 23–8 Backlog Management screen

4. Revise the following fields, if needed:
 - Percent Complete
 - Flash Message
 - Status Comment
5. To revise any information not included on Backlog Management, choose Work Order Entry for each work order.

23.3.4 What You Should Know About

Topic	Discussion
Revising actual and estimated hours	<p>Change information in these fields only if you are not using labor routing. Any value that you enter in the Actual Hours field overrides the actual hours' value generated through the Payroll system.</p> <p>See Section 26.1, "Adding Costs to Work Orders" for more information.</p>

Topic	Discussion
Over-capacity conditions	<p>Depending on how you set up the work order activity rules, changing the following work order dates might create an over-capacity condition:</p> <ul style="list-style-type: none">■ Start date■ Request date <p>If the new dates create an over-capacity condition, the system displays a warning message.</p> <p>See Section 33.4, "Revising Labor Resources" for more information about adjusting labor resources to accommodate over-capacity conditions.</p> <p>See Section 38.5.2, "Setting Up Work Order Activity Rules" for more information about capacity warning messages.</p>

23.4 Printing Work Orders

You can print work orders when you need a hard copy of a work order or group of work orders. If you already know the work order number, you can quickly print the work order from the work order master. If you need to print multiple work orders, you can use data selection criteria to specify which work orders to print. You can also use Backlog Management to select a specific work order to print.

Printing work orders consists of the following tasks:

- Printing work orders using Backlog Management
- Printing a batch of work orders

23.4.1 Printing Work Orders Using Backlog Management

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Work Orders**

From **Equipment Work Orders (G1316)**, choose **Backlog Management**

You can use Backlog Management to locate and print work orders for which you need a hard copy. Use search criteria to broaden or narrow your search for the work orders for which you need hard copies.

Processing options allow you to choose which version of the Equipment Work Order Print program the system uses to print work orders.

23.4.2 Before You Begin

- Set up Default Locations and Printer. See [Section 38.8, "Defining Default Location and Printers"](#) for more information.

To print multiple work orders, choose Print Work Orders. When you choose Print Work Orders, the system displays a versions list. The versions list includes a DEMO version that you can run or copy and revise for your business needs.

To print work orders using Backlog Management

On Backlog Management

1. Complete the steps for locating a work order or group of work orders.
2. For each work order that you want to print, choose Print Work Order.

23.4.3 What You Should Know About

Topic	Discussion
Printing work orders directly from the work order master	<p>If you know the number of the work order that you want to print, you can print it directly from the work order master. Enter the number of the work order on Work Order Entry and choose Print.</p> <p>You can use processing options to choose which version of the Equipment Work Order Print program the system uses to print work orders. See Section 20.1, "Creating Corrective Work Orders" for the processing options for Work Order Entry.</p>

See Also:

- [Section 23.2, "Locating Work Orders"](#) for the processing options for Backlog Management

23.4.4 Printing a Batch of Work Orders

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Work Orders**

From **Equipment Work Orders (G1316)**, choose **Print Work Orders**

You can use Print Work Orders to print a batch of work orders. When you use Print Work Orders, you use data selections to specify which work orders to print. You then use processing options to specify the amount of work order information that you want the system to print. For example, you can specify whether the system prints:

- Parts lists and routing instructions on a separate page
- Dates associated with work order record types
- Equipment specification data
- A pick list report

You can also specify the record types that you want to print and whether to print work order supplemental data. In addition, you can update the status of the work orders at the same time that you print them.

See Also:

- *JD Edwards World Technical Foundation Guide* for information about running, copying, and changing a DREAM Writer version

23.4.5 Processing Options

See [Section 55.5, "Equipment Work Order Print \(P48425\)"](#).

Swap a Component

This chapter contains this topic:

- [Section 24.1, "Swapping a Component"](#)

24.1 Swapping a Component

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Entry

To simplify moving equipment components from parent to parent, you can swap an equipment component for another on a work order. When you swap a component, you can specify changes that you want to make to the parent/component relationships for each component. For example, you might need to install a new exhaust fan in Production Line 1 while you service the old exhaust fan. You can update the parent/component relationships to indicate that the new exhaust fan is now a child of Production Line 1.

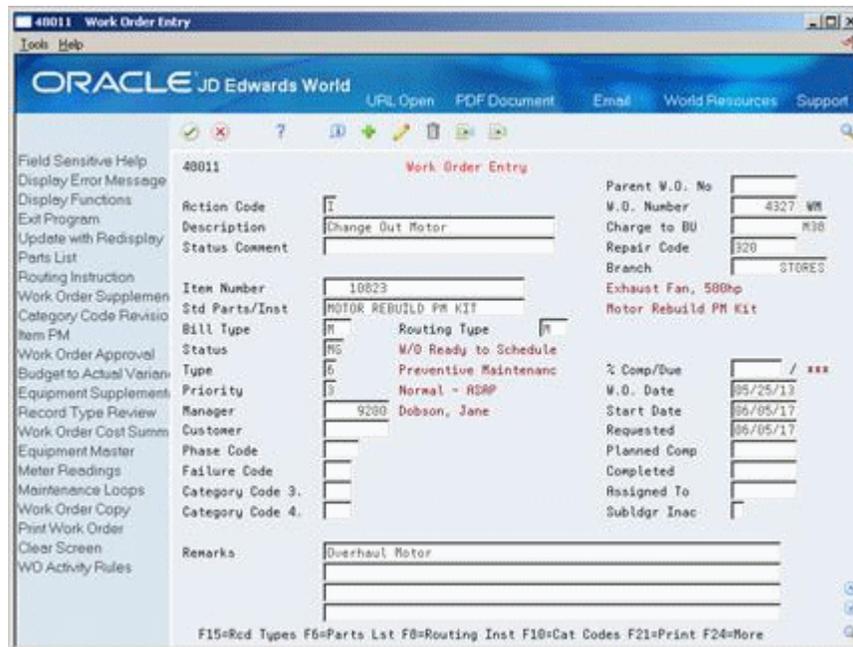
When you swap components, you can update the status of each component affected by the swap. For example, you can indicate a status of Down for the exhaust fan that you removed from Production Line 1 and a status of Working for the new exhaust fan that you installed.

You can also revise the responsible business unit of the old component. In addition, you can revise the location information for either component. If you revise the location information for the new component, you can specify a location or use the location of the component's parent.

To swap a component

On Work Order Entry

Figure 24–1 Work Order Entry screen



1. To locate a work order, complete the following field:
 - W.O. Number
2. Update the following field:
 - Status
3. Enter C in the following field:
 - Action Code

Figure 24–2 Status Change Date and Time screen



4. On Status Change Date and Time, complete the following fields:
 - Changeout Code
 - Equipment Status (optional)
5. Press Enter to return to the Work Order Entry screen. The Component changeout fields display.

Figure 24-3 Component Changeout Fields on the Work Order Entry screen

The screenshot shows the 'Work Order Entry' screen in Oracle JD Edwards World. The window title is '40011 Work Order Entry'. The main area displays a form for 'Component Changeout' with the following fields and values:

- Action Code: 13COMP
- Description: Component Changeout
- Status Comment: Parent Number 10091
- Parent V.O. No: 327 WM
- Production Line 1: Exhaust Fan, 500hp
- Old Component: 1002
- BU Code: BU
- Change Loc: Location
- Create WO:
- New Component:
- Children Code:
- BU Code:
- Eq Status:
- Update Children:
- Change Loc: Location

At the bottom of the screen, there are function keys: F6=Update and F24=More Keys. The status bar shows 'F15=Red Types F' and '4=More'.

6. For the old component, complete the following optional fields:
 - BU Code
 - BU
 - Change Loc (Location)
 - Location
 - Create WO
7. Complete the following field:
 - New Component
8. For the new component, complete the following optional fields:
 - Children Code
 - BU Code
 - Eq (Equipment Status)
 - Update Children
 - Change Loc (Location)
 - Location
9. Choose Update.

Field	Explanation
Changeout Code	This code is used to determine whether an Equipment Component Changeout was done on the work order. Valid Codes are: 0 – Component Changeout was not done. 1 – Component Changeout was done.

Field	Explanation
Eq Status	A user defined code (12/ES) that identifies the equipment or disposal status of an asset, such as available, down, or disposed.
New Component	If the asset being disposed of was traded in on the acquisition of a new asset, you must first set up the new asset. The system reclassifies the Net Book Value of the old asset (trade in) to the new asset.
Children Code	This code is used during a component changeout from a work order. It determines whether the children of the component being changed out stays with that component or whether they are attached to the new component. Valid Codes are: 0 – Children stay with the original component. 1 – Children are attached to the new component.
Update Children	When you change the status of a piece of equipment, the system prompts you to update the status of the children of the equipment as well. Valid codes are: Y – Update the status of the children with the parent item. N – Do not update the children. Update only the equipment item being processed. If you leave this field blank, the default value is N.
BU Code	This code is used to determine whether the Responsible Business Unit of the equipment component(s) should be changed to be the same as the parent's Responsible Business Unit. Valid Codes are: 0 – Responsible Business Unit will not be changed. 1 – Responsible Business Unit will be changed.
Create WO	This code determines whether the system creates a work order for the old component when you do a component changeout. When the system creates a work order, it uses default values from the processing options from the ZJDE0001 version of Work Order Entry (P48011). Valid values are: blank – Do not create a work order 1 – Create a work order
Location	The current physical location of an asset. This must be a valid business unit or job number in the Business Unit Master file (F0006).

24.1.1 What You Should Know About

Topic	Discussion
Relocating a new component	To relocate a new component to the same location as its parent, enter a value of Y in the Change Location field and leave the Location field blank.

24.1.2 Processing Options

See [Section 55.1, "Equipment Work Order Entry \(P48011\)"](#)

See Also:

- [Section 20.2, "Entering Basic Work Order Information"](#) for the processing options for this program

Purchase Parts for a Work Order

This chapter contains this topic:

- [Section 25.1, "Purchasing Parts for a Work Order"](#)

25.1 Purchasing Parts for a Work Order

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Work Orders**

From **Equipment Work Orders (G1316)**, choose **Work Order Entry**

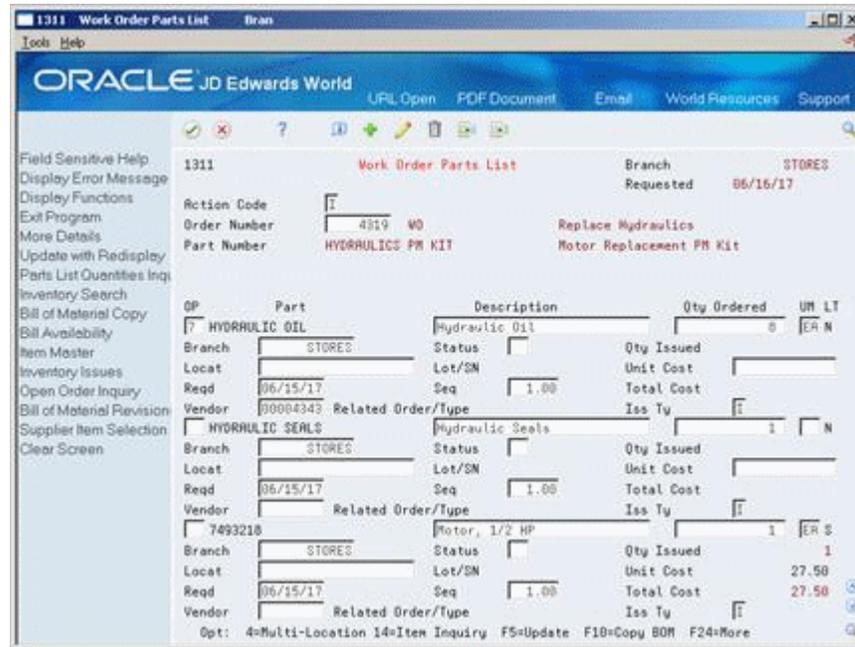
You can purchase parts for a work order by creating purchase orders directly from the work order parts list. This is particularly useful if a maintenance task requires parts that you do not usually stock, such as unusually costly parts or parts that have long order lead times.

When you create purchase orders directly from the work order parts list, you can use processing options to specify the initial status of the purchase order, as well as the approval route for the purchase order. After the system creates the purchase order, the purchase order number and document type appear in the detail portion of the work order parts list.

25.1.1 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to use Work Order Parts List:
 - · System 30 - Product Data Management
 - · System 31 - Shop Floor Control
 - · System 40 - Inventory Base and Order Processing
 - · System 41 - Inventory Management
 - · System 43 - Procurement
- Verify that the FP AAI is set up. See [Section 35.2.3, "Setting Up Equipment/Plant AAIs"](#) for more information.
- Verify that processing options for Work Order Parts List Revisions have been set to allow you to create purchase orders. See [Section 38.7.1, "Revising Processing Options for Parts Lists and Labor Routings"](#) for more information.

Figure 25–3 Work Order Parts List screen (Details area)



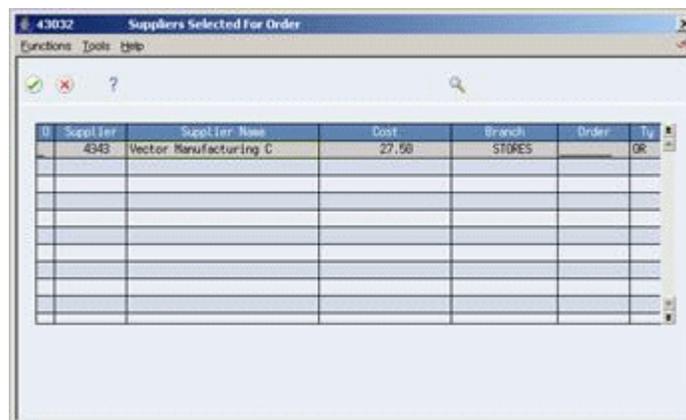
4. Complete the following fields:

- UM
- Vendor

This field might already contain a value. You can accept this value or revise it.

5. For each part that you want to order, choose Create Purchase Order.

Figure 25–4 Suppliers Selected for Order screen



6. On Suppliers Selected for Order, choose Create Order.

The purchase order number appears on the screen. If you decide not to order the part at this time, you must choose Cancel before you return to Work Order Parts List.

7. Press Enter to return to Work Order Parts List.

25.1.2 What You Should Know About

Topic	Discussion
Purchasing parts on a recurring basis	<p>When you need to purchase parts for which you have a recurring need, such as purchasing parts for PM work orders, you can create purchase orders for parts using Purchase Management or generate purchase orders using the parts planning features in Equipment/Plant Maintenance.</p> <p>See <i>Entering Purchase Order Header Information</i> and <i>Entering Purchase Order Detail Information</i> in the <i>JD Edwards World Procurement Guide</i> for more information about creating purchase orders.</p>
Equipment under warranty	<p>When you create a purchase order for a piece of equipment for which you have defined a warranty service type, the system displays a warning message to alert you that a warranty is in effect.</p> <p>See Section 14.3.1, "Creating PM Schedules for Each Piece of Equipment" for more information about creating PM service types for equipment under warranty.</p>
Viewing supplier catalogs	<p>If you have set up supplier catalogs, you can view the catalogs directly from Work Order Parts List. You must first identify a supplier in the vendor field in the detail portion of the screen. To view catalogs for the supplier, place the cursor in the Part field and choose the Supplier Item Selection function. This is especially useful if you want to review costs associated with non-stock parts.</p> <p>See <i>Entering Supplier Prices</i> in the <i>JD Edwards World Procurement Guide</i> for more information about setting up supplier catalogs.</p>

25.1.3 Processing Options

See [Section 55.1, "Equipment Work Order Entry \(P48011\)"](#).

Add Costs to Work Orders

This chapter contains these topics:

- [Section 26.1, "Adding Costs to Work Orders"](#)
- [Section 26.2, "Issuing Parts to a Work Order"](#)
- [Section 26.3, "Entering Employee Time on a Work Order"](#)

26.1 Adding Costs to Work Orders

You add costs to a work order whenever you issue parts and materials to a work order or enter employee time on a work order. You can use any JD Edwards World system that creates transactions (journal entries) with a subledger type of W in the Account Ledger table (F0911) to add costs to a work order. Each transaction contains the work order number.

26.2 Issuing Parts to a Work Order

When the maintenance tasks associated with a work order require parts, you add the cost of the parts to the work order by issuing parts to the work order. Depending on the parts requirements of the maintenance tasks and how you have applied parts to a work order, you can choose from the following methods to issue parts to a work order:

Method	Description
Issuing parts included on parts lists	Use this method if you have set up parts lists for your work orders. When you issue parts included on the work order parts list, the system reflects a reduction in available inventory for the parts by reducing the commitment for the parts. See Section A.1.3, "Commitments" in Appendix A for more information about inventory commitments.
Issuing miscellaneous parts to a work order	Use this method if you need to assign different account numbers to parts issues than the account from the work order parts list. You can also use this method if you want to add parts costs directly to a piece of equipment without using a work order.

Issuing parts to a work order consists of the following tasks:

- Issuing parts included on the work order parts list
- Issuing miscellaneous parts to a work order
- Posting inventory issues to the G/L

26.2.1 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to issue parts to a work order:
 - · System 30 - Product Data Management
 - · System 31 - Shop Floor Control
 - · System 40 - Inventory Base and Order Processing
 - · System 41 - Inventory Management
- Set up the 4122 and 4124 automatic accounting instructions in the Inventory Management system. See Understanding Automatic Accounting Instructions for the Inventory Management System in the *JD Edwards World Inventory Management Guide*.
- Set up branch/plant constants in the Inventory Management system to specify how you want the system to display parts transactions in the G/L. You can specify either part numbers or part descriptions, but not both. See Defining Branch/Plant Constants in the *JD Edwards World Inventory Management Guide*.

See Also:

- [Appendix A, "Inventory Concepts and Setup"](#) for more information about inventory setup requirements specific to Equipment/Plant Maintenance

26.2.2 Issuing Parts Included on the Work Order Parts List

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Processing

From Work Order Processing (G1317), choose Work Order Inventory Issues

You issue parts included on the work order parts list when you need to add costs to a work order for parts that you included on the parts list. This method is especially useful when you want to issue all parts from the parts list to the work order at the same time. You can specify the debit account to which any or all of the parts are charged if it differs from the charge to business unit specified on the work order.

You can also use Work Order Inventory Issues to issue parts to a work order that are not included on the work order parts list. When you issue parts that are not included on the work order parts list, the system updates the parts list to include the additional parts. You can use processing options to restrict the parts issued to a work order to only parts that are included on the parts list.

You can use processing options to direct the system to automatically preload all part detail lines with the Process Issue option. This is particularly useful if you rarely choose not to issue parts from the parts list to the work order. Other processing options allow you to update the work order status based on whether all or only some of the parts have been issued to the work order. This is especially useful for lengthy parts lists for which the availability of some of the parts might be delayed.

To issue parts included on the work order parts list

On Work Order Inventory Issues

Figure 26–1 Work Order Inventory Issues screen

31111 Work Order Inventory Issues - P1

Tools Help

ORACLE JD Edwards World URL Open PDF Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Update with Redisplay
Inventory Issues Inquiry
Inventory Search (Cursor)
Clear Screen

31111 Work Order Inventory Issues Plant STORES
Requested: 06/16/17
G/L Date: 09/12/06

Action Code
Order Number 4319 WO
Part Number HYDRAULICS PM KIT
Quantity Ordered 1
Issue Material For 1
Account Number

Replace Hydraulics
Motor Replacement PM Kit
Issued To

Part	Description	Qty Ordered	Qty Issued	Issues	UM
7493218	Motor, 1/2 HP	1	1		ER
512-EATON	Hydraulic Pump	1	1		ER

Opt: 6=Loc Search 9=Close Out Line F6=Inv Issues Inquiry F24=More Keys

1. To locate a work order, complete the following field:

- Order Number

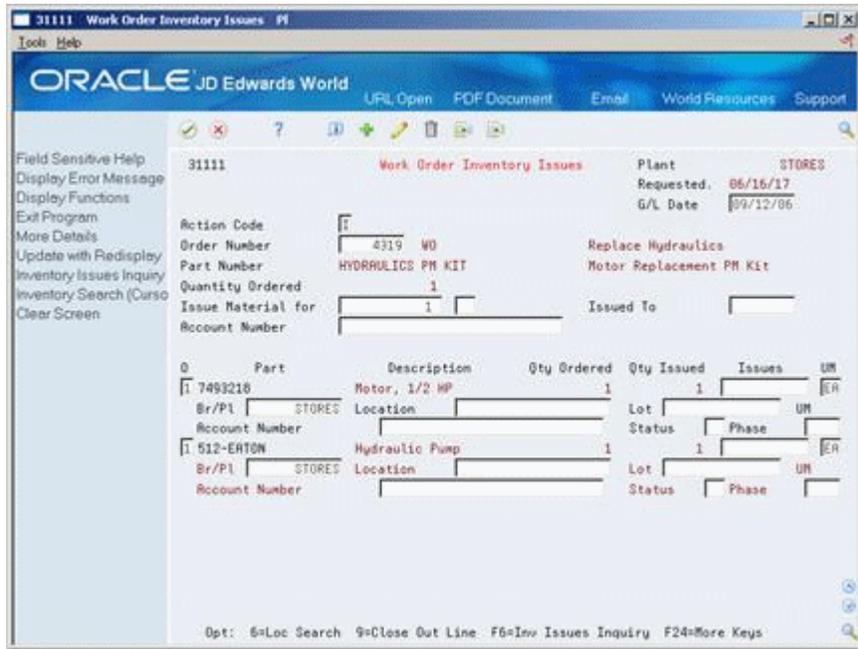
The system updates the screen with default values for all inventory items and quantities from the work order parts list.

2. Complete the following optional fields:

- Issue Material For
- Issued To
- Issue Quantity
- Account Number

3. Choose More Details.

Figure 26–2 Work Order Inventory Issues screen



4. Complete the following optional fields:
 - Br/P1 Branch or Plant
 - Location
 - Lot
 - Account Number
 - Phase
5. For each part to issue to the work order, choose Process Issue.

Field	Explanation
Issue Material for	The number of parent items you want to process. The system calculates lower-level values in quantity per the number of parent items requested. For example, if 3 components are needed for a parent item, and the requested quantity is 10, the system plans for 30 components.
Issued To	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members. <i>Form-specific information</i> The system enters a default value based on the second address book number (AN8) entered on the work order header.
Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant.
Lot	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.

Field	Explanation
Account Number	<p>A field that identifies an account in the general ledger. You can use one of the following formats for account numbers:</p> <ul style="list-style-type: none"> ■ Standard account number (business unit.object.subsidiary or flexible format) ■ Third G/L number (maximum of 25 digits) ■ 8-digit short account ID number ■ Speed code <p>The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program.</p> <p><i>Form-specific information</i></p> <p>Identifies the debit account to which the parts are charged. The account that you enter in this field overrides the charge to business unit on the work order. If you leave this field blank, the system charges the parts based on the charge to business unit on the work order and the object account from the Inventory system AAls.</p> <p>This field appears in the header and detail portions of the screen. If you enter an account in the header portion of the screen and leave the account fields blank in the detail portion of the screen, the header account applies to all detail lines. If you enter an account in the detail portion for a particular item, it overrides the account specified in the header portion.</p>

26.2.3 What You Should Know About

Topic	Discussion
Reversing an inventory issue transaction	You can reverse an inventory issue transaction by typing the quantity of the item that you want to reverse as a negative number in the Issues field.
Closing out parts no longer required	You can close out parts no longer required for a maintenance task by choosing Close Out Line for each item that you no longer need. You must also remove the value from the Issues field for the items that you do not want to process. When you close out an item, the system indicates closed in the Issues field for that item.
Equipment under warranty	When you issue parts to a work order for a piece of equipment for which you have defined a warranty, the system provides a soft warning indicating the warranty status.
Issuing non-stock parts	<p>You can issue non-stock parts to a work order if you have defined them on the work order parts list. When you use Work Order Inventory Issues to issue non-stock parts, the system updates the work order parts list, but does not create any accounting transactions.</p> <p>See Appendix A, "Inventory Concepts and Setup" for more information about stock and non-stock parts.</p>
Import/Export Functionality for Work Order Inventory Issues (P31111) (Release A9.3 Update)	<p>You can use the Import/Export functionality to allow Import and export Equipment Work Order Inventory issues.</p> <p>Use the Function Key to create a template to export P31111 to a file or upload data from an outside file to P31111.</p>

26.2.4 Processing Options

See [Section 55.7, "Work Order Inventory Issues \(P31111\)"](#)

26.2.5 Issuing Miscellaneous Parts to a Work Order

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Processing

From Work Order Processing (G1317), choose Inventory Issues

Use Inventory Issues to issue miscellaneous parts to a work order when you need to assign different account numbers to charge parts issues than the account from the work order parts list. You can also use this method if you want to add parts costs directly to a piece of equipment without using a work order.

Note: If you use Inventory Issues to issue parts from inventory that are already included in the parts list for the work order, the system does not relieve the inventory commitment. If you need the system to relieve the inventory commitment, use Work Order Inventory Issues.

26.2.6 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to access Inventory Issues:
 - · System 40 - Inventory Base and Order Processing
 - · System 41 - Inventory Management
- You must set the processing option for Screen Control to display equipment-based issues or equipment and subledger-based issues to enter an equipment number and a work order number on Inventory Issues.

See Also:

- [Section 26.2.2, "Issuing Parts Included on the Work Order Parts List"](#) for more information about using Work Order Inventory Issues

To issue miscellaneous parts to a work order

On Inventory Issues

Figure 26-3 Inventory Issues screen

4112 Inventory Issues - Branch

Tools Help

ORACLE JD Edwards World URL Open PDF Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Additional Information
Copy Bill of Material
Journal Entries
Warehouse Movement
Clear Screen

4112 Inventory Issues Branch/Plant STORES
Trans. Date 06/30/17

Action Type
Document Number
Document Type II
G/L Date 06/30/17

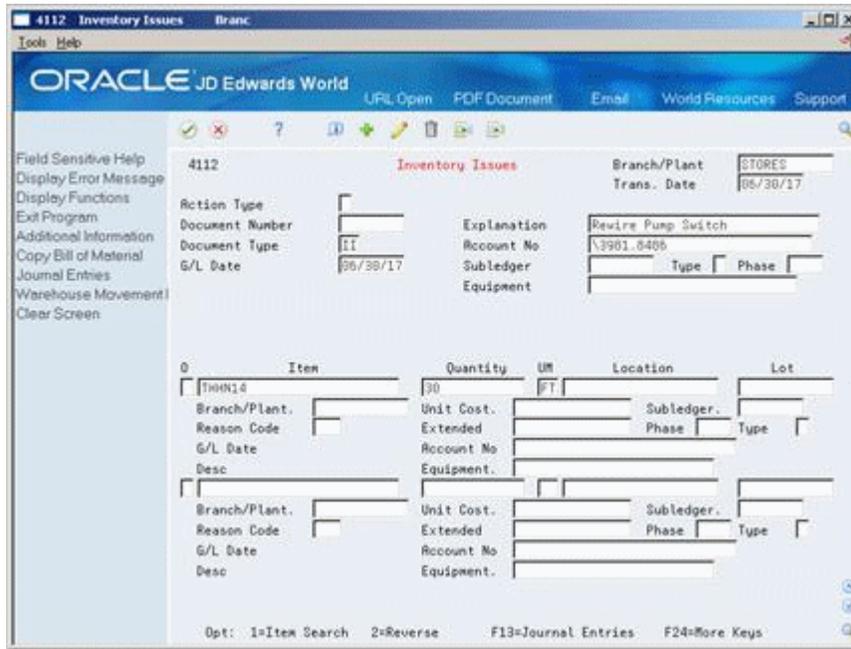
Explanation Rewire Pump Switch
Account No. \3901.0406
Subledger
Equipment

Item	Quantity	UM	Location	Lot
170010	30	FT		

Opt: 1=Item Search 2=Reverse F13=Journal Entries F24=More Keys

1. Complete the following fields:
 - Branch/Plant
 - Account Number
 - Subledger
 - Equipment Number
 - Explanation
2. For each part, complete the following fields:
 - Number
 - Quantity
 - Location
 - Lot
3. For each part, complete the following optional field:
 - Unit of Measure
4. Complete the following optional fields:
 - Transaction Date
 - Type
 - Phase
5. Choose Additional Information.

Figure 26–4 Inventory Issues screen (Additional Information area)



6. Complete the following optional fields:

- Branch or Plant
- Extended Cost

Field	Explanation
Branch/Plant	<p>An alphanumeric field 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, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p> <p><i>Form-specific information</i></p> <p>The Branch/Plant field in the fold area lets you indicate from which branch to issue if an item has more than one branch location.</p>
Explanation	<p>This text identifies the reason that a transaction occurred.</p> <p><i>Form-specific information</i></p> <p>A specific explanation for a particular issue. If you leave this field blank, the system automatically supplies this explanation from the descriptions that are associated with the document type that you specified.</p>

Field	Explanation
Quantity	<p>The available quantity can be on-hand balance minus commitments, reservations, and backorders. This is user defined in branch/plant constants.</p> <p><i>Form-specific information</i></p> <p>This is the quantity of an inventory item to be issued.</p>
Location	<p>A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant.</p>
Lot	<p>A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.</p> <p><i>Form-specific information</i></p> <p>You can set the processing options to have the system use the lot specified in the primary location as the default.</p>
Trans. Date	<p>The date the work order was entered into the system.</p>
Phase	<p>A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.</p> <p>Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a screen for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup screen. You can either accept or override the default value.</p> <p><i>Form-specific information</i></p> <p>You can charge inventory costs to a particular phase of a project.</p>
Extended	<p>For accounts receivable and accounts payable, this is the invoice (gross) amount. For sales orders and purchase orders, this is the unit cost times the number of units.</p>

26.2.7 What You Should Know About

Topic	Discussion
Using work order speed entry	<p>You can use work order speed entry to save time and reduce the possibility of data entry error. To use speed entry, complete the Account Number field by entering a backslash (\) followed by the work order number, a period (.), and the number of the object account.</p> <p>For example, to enter information for work order number 3981 and object account number 8486, enter \3981.8486.</p> <p>When you use speed entry, the system enters values in the following fields:</p> <ul style="list-style-type: none"> ■ Business Unit. The system uses the Charge to Business Unit from the work order. ■ Account Number. The system enters the object account number based on the object account that you entered. The system enters the subsidiary account number based on the repair code from the work order. ■ Subledger. The system enters the work order number. ■ Type. The system enters W for the work order subledger type.

26.2.8 Processing Options

See [Section 55.8, "Equipment and Subledger Inventory Issues \(P4112\)"](#)

See [Section 55.9, "Simple Inventory Issues \(P4112\)"](#)

See [Section 55.10, "Work Order \(Subledger\) Inventory Issues \(P4112\)"](#)

26.2.9 Posting Inventory Issues to the G/L

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Processing

From Work Order Processing (G1317), choose Post Inventory to G/L

When you issue parts to a work order, the system creates unposted G/L transaction records in the Account Ledger table (F0911). Each transaction contains the work order number and the equipment number. You must post these transactions to the G/L. You use Post Inventory to G/L to post transactions to the G/L. When you post transactions to the G/L, the system updates the Account Balances table (F0902).

After you post inventory transactions to the G/L, you must post them to equipment in order to update the Item Balances table (F1202). Processing options in the G/L post program enable you to post transactions to equipment at the same time you post to the G/L.

When you choose Post Inventory to G/L, the system displays Processing Options Revisions. After you choose the appropriate processing options, the system displays a message that the batch was submitted to post.

26.2.10 What You Should Know About

Topic	Discussion
Reviewing inventory issues prior to posting	<p>You can review inventory issues before you post them to the G/L. Choose G/L Journal Review from the Work Order Processing menu. Complete any of the following fields to display a specific batch:</p> <ul style="list-style-type: none"> ■ User ID ■ Batch Number ■ Batch Date From ■ Batch Date Thru <p>You can also display all posted batches by entering an asterisk (*) in the Batch Status field.</p>

26.2.11 Processing Options

See [Section 55.16, "General Ledger Post \(P09800\)"](#)

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about copying, changing, and running DREAM Writer versions

26.3 Entering Employee Time on a Work Order

You can enter employee time on a work order to account for labor costs associated with the work order. You can use the following methods to enter employee time:

Method	Description
Entering time by employee	Use Time Entry by Employee to charge hours and costs for an individual employee to a work order, a piece of equipment, or an individual routing step. For example, you might use this method to enter employee time for an employee who has worked on multiple jobs during the pay period.
Entering time by shop or business unit	Use Time Entry by Shop or Business Unit to charge hours and costs for multiple employees to a work order, a piece of equipment, or an individual routing step.

When you use the Time Accounting system, you can enter labor time for individual routing steps. When you use the Payroll system, the system calculates payroll liabilities, such as payroll taxes and employee benefits.

You can enter employee time for a work order using the following methods:

- Enter work order time by employee
- Enter work order time by shop or business unit

26.3.1 Before You Begin

- Verify that you have purchased and installed at least one of the following systems. You must have installed at least one of these systems to be able to enter employee time on a work order:
 - System 05 - Time Accounting and HRM Base

- · System 07 - Payroll
- · System 77 - Payroll (Canadian)
- Verify that the Debit - Labor/Billings/Equipment table is set up. See Setting Up Automatic Accounting Instructions in either the *JD Edwards World U.S. Payroll II Guide* or the *JD Edwards World Time Accounting Guide*.

26.3.2 What You Should Know About

Topic	Discussion
Choosing speed entry or standard entry	<p>You can use either speed entry or standard entry to enter time on a work order. When you use speed entry, the system automatically enters the following information:</p> <ul style="list-style-type: none"> ■ The object account number from the Accounting Rules table ■ The subledger and subledger type ■ The business unit and subsidiary (Repair Code) from the work order <p>In addition, depending on the method that you use, you can use processing options to direct the system to enter the equipment number from the work order on the time entry screen.</p> <p>If you need to enter an account other than the one on the work order, you can use standard entry. When you use standard entry, you can enter any account in your chart of accounts, but you must manually enter the business unit, object account, subsidiary (Repair Code), subledger, and subledger type.</p>
Speed entry	<p>You can use speed entry to save data entry time and reduce the chance for errors. To use speed entry, complete the Account Number field or the Cost Code field by typing a backslash (\), followed by the work order number, and then a period (.). For example, to enter an account number and related information for work order #2314, type \2314. To create the account number, the system will then use the Charge to BU and Repair Code field in the Work Order Header. The system also references the Payroll Constants and Debit-Labor/Billing/Equipment tables related to the Object Account screen.</p>

26.3.3 Entering Work Order Time by Employee

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Processing

From Work Order Processing (G1317), choose TE by Employee

Alternately, you can choose Time Entry from the Payroll Master Menu or the Canadian Payroll Master Menu.

Enter work order time by employee when you need to:

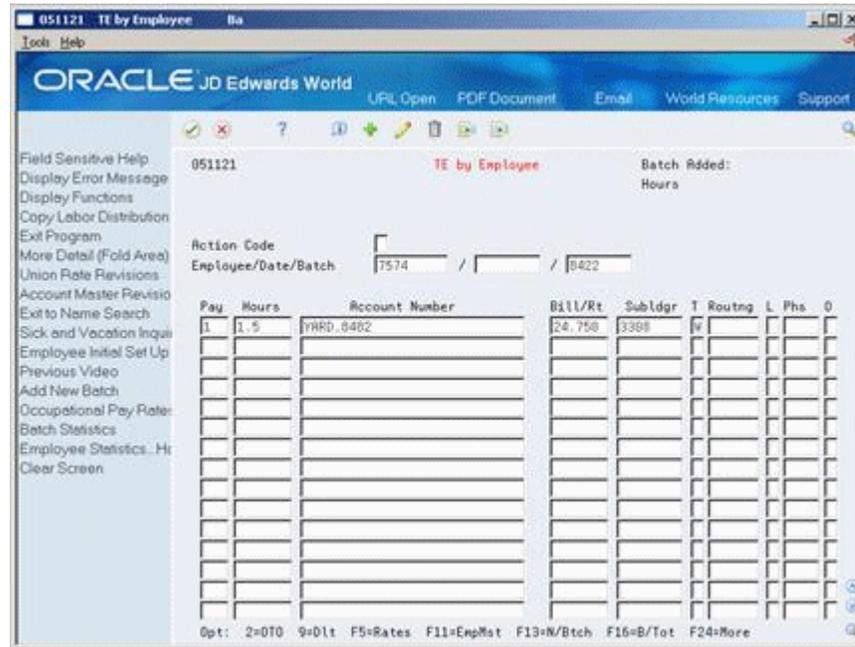
- Transfer employee information for an individual employee from a work order to payroll

- Charge employee hours and costs to a work order, a piece of equipment, or an individual routing step

To enter work order time by employee

On TE by Employee

Figure 26-5 TE by Employee screen



1. Complete the following fields:

- Employee
- Date
- Batch Number
- Pay Type
- Hours

Note: You may add your own batch number or have the system automatically assign the batch number by selecting 1 in Processing Option #4.

2. Complete the following field:

- Account Number

3. If you are not using speed entry, complete the following fields:

- Subledger
- Subledger type

4. Complete the following optional fields:

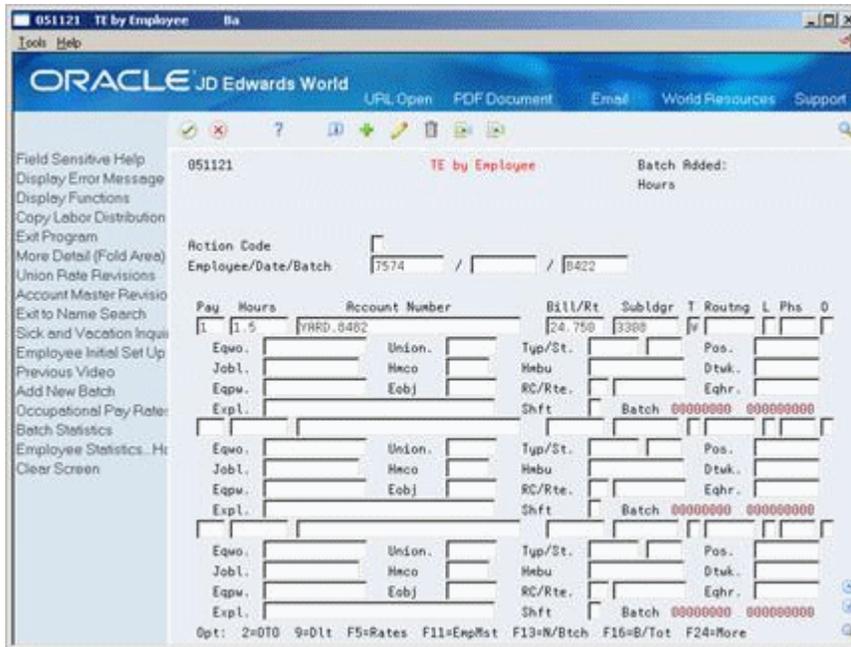
- Billing Rate

- Routing (Time Accounting only)

Note: You can set the processing options to allow you to select which employee rate will be used, such as Employee Occupational Rate or the Union Rate.

5. Choose More Detail.

Figure 26–6 TE by Employee screen (Detail area)



6. If you are not using speed entry, complete the following field:

- Eqwo (Equipment Worked On)

To generate a timecard journal

Navigation

From Time Accounting System (G05), choose Time Card Post/History Update

From Time card Post and History Update (G0513), choose Generate Timecard Journals

On Generate Timecard Journals

Figure 26–7 Generate Timecard Journals screen

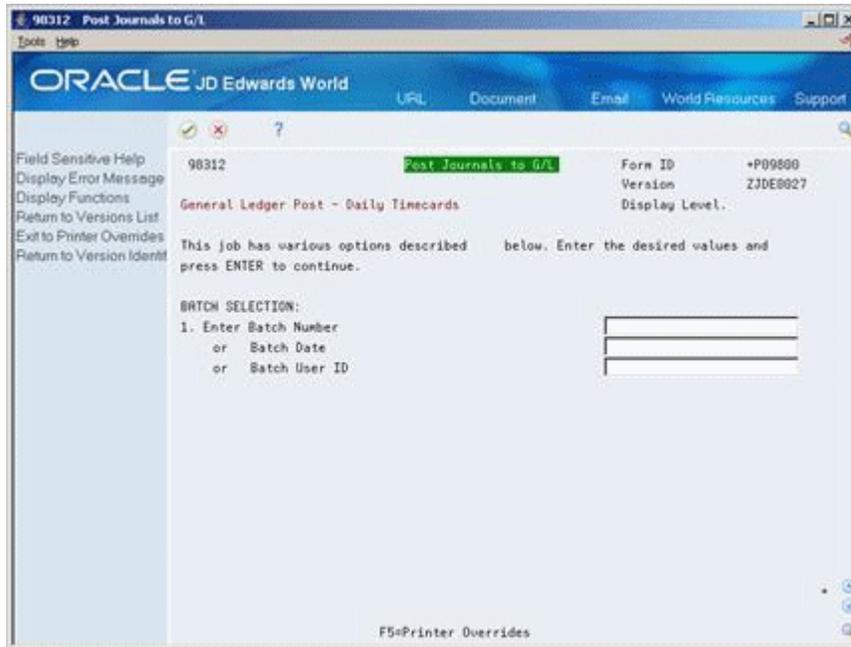


1. Create a version of P062901.
2. In Processing Options, enter the correct G/L date for Journal Entries and set the other processing options to your preference.
3. In Data Selection, make sure you enter the batch number created from Time Entry.
4. Run the Program.
5. Select Journal Batch Review.
6. Review the new Batch number.
7. Approve the batch.

To post the timecard journal

On Post Journals to G/L

Figure 26–8 Post Journals to G/L screen



1. Enter the Batch number
2. Choose Enter.

After running the program, you will have G/L entries for employee time entry on a work order, which you can review for the proper accounts, credit and debit entries. You will also have a batch record, which you can review in the Batch Header Revisions program P0011.

Field	Explanation
Bill/Rt	<p>A rate used for the billing of labor services. This rate is often referred to as the billing or recharge rate. The extended amount based on this rate will be charged to the primary distribution account on the timecard with an offset being made to an account derived from the Accounting Rules table. This rate will not affect the employee's payroll. To allow billing rates in time entry, you must set the employee's record type as either 2 or 3 on the Basic Employee Entry screen.</p> <p>A rate entered on any of the following screens overrides the rate in the Employee Primary Job table:</p> <ul style="list-style-type: none"> ■ Pay Rate Information ■ Employee Labor Distribution ■ Occupational Pay Rates ■ Time Entry by Employee ■ Time Entry by Job or Business Unit ■ Daily Timecard Entry ■ Time Entry by Employee with Equipment ■ Time Entry by Shop Floor Control

Field	Explanation
Account Number	<p>A field that identifies an account in the general ledger. You can use one of the following formats for account numbers:</p> <ul style="list-style-type: none"> ■ Standard account number (business unit.object.subsidiary or flexible format) ■ Third G/L number (maximum of 25 digits) ■ 8-digit short account ID number ■ Speed code <p>The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program.</p> <p><i>Form-specific information</i></p> <p>You can use speed codes to reduce data entry when you enter work order information. When you enter a speed code, the system automatically enters account information that is stored elsewhere in the system. To enter a speed code, enter a back slash (\), the work order number, and a period (.) For example, work order 145648 is entered as \145648. in the Account Number field.</p> <p>When you add the timecard information, the system:</p> <ul style="list-style-type: none"> ■ Replaces the speed coding information with account number information ■ Uses the Charge to Business Unit number from the work order ■ Uses the Object Account number from the Automatic Accounting Instructions for Debit/Labor/Billing/Equipment for Journal Type LD ■ Enters the work order number in the Subledger field in the detail area ■ Enters W as the subledger type
Routing	<p>In routings, this number is used to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.</p> <p>In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Control system uses this field in the backflush/preflush by operation process.</p> <p>In engineering change orders, this number is used to sequence the assembly steps for the engineering change.</p> <p>Skip To fields allow you to enter an operation sequence that you want to begin the display of information.</p> <p>You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.</p>

26.3.4 What You Should Know About

Topic	Discussion
Speed entry with the Payroll system	When you use speed entry on the Time Entry by Employee program, or the Time Entry by Employee with Equipment program, the system does not enter the equipment number from the work order. However, when you post the time entry transaction, the system enters the equipment number from the work order on the transaction record.

26.3.5 Processing Options

See [Section 55.11, "Time Entry by Individual \(P051121\)"](#).

26.3.6 Entering Work Order Time by Shop or Business Unit

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Work Order Processing

From Work Order Processing (G1317), choose TE by Shop or Business Unit

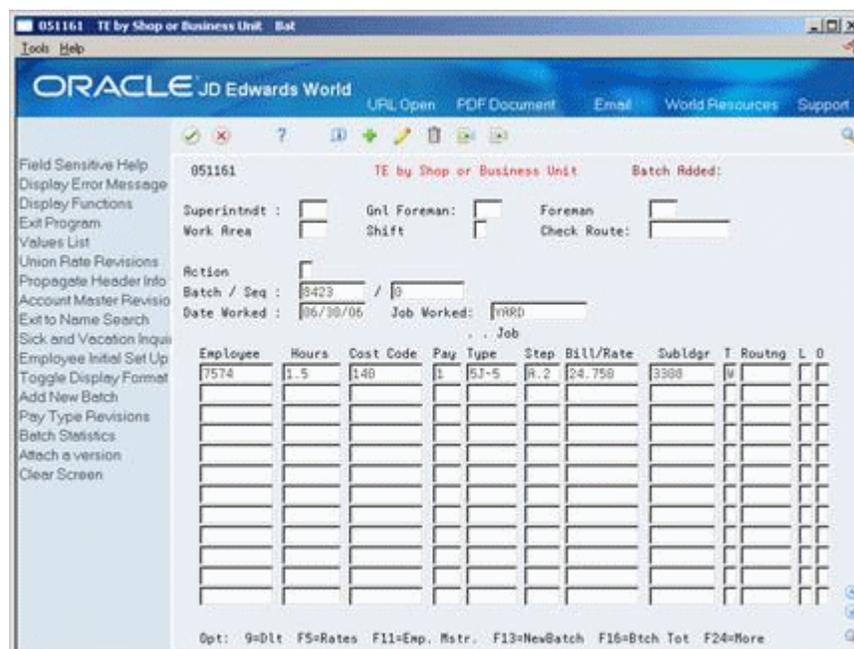
You can enter employee time on a work order to account for labor costs associated with the work order. You can enter time by job or business unit when you need to:

- Transfer shared information for multiple employees from a work order to payroll
- Charge hours and costs for multiple employees to a work order or multiple accounts

To enter work order time by shop or business unit

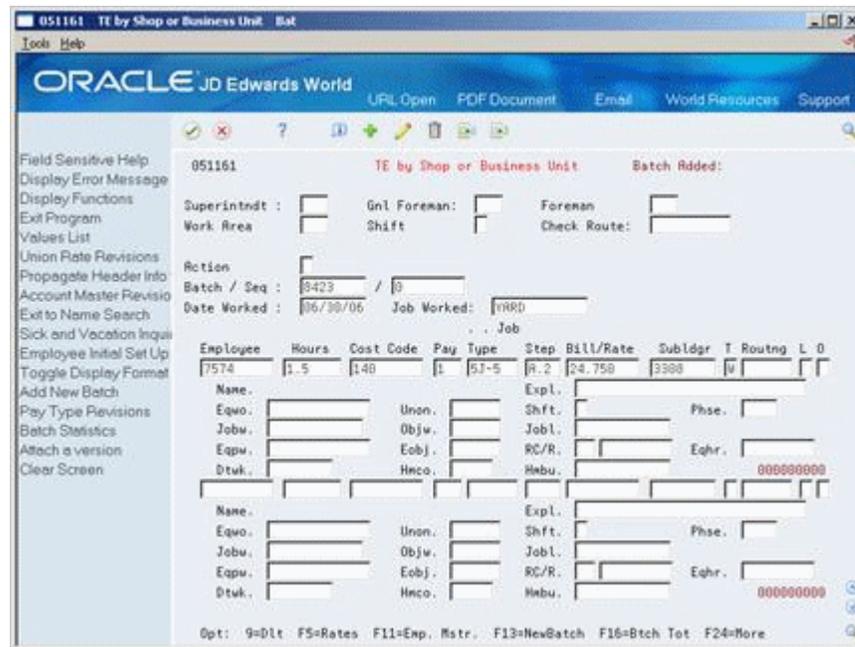
On TE by Shop or Business Unit

Figure 26–9 TE by Shop or Business Unit screen



1. Complete the following fields:
 - Batch Number
 - Date Worked
 - Job Worked
 - Employee
 - Hours
 - Cost Code
 - Pay Type
2. If you are not using speed entry, complete the following fields:
 - Subledger
 - Subledger Type
3. Complete the following optional field:
 - Routing Step (Time Accounting only)
4. To display equipment fields, choose Values List.

Figure 26–10 TE by Shop or Business Unit screen (Equipment fields)



5. If you are not using speed entry, complete the following field:
 - Eqwo (Equipment Worked On)

26.3.7 What You Should Know About

Topic	Discussion
Using the Payroll system	The procedures for entering time to a work order through Payroll are similar to those for Time Accounting. However, when you use the Payroll system, you cannot enter a routing step.
Speed entry with the Payroll system	When you use speed entry with the Time Entry by Job or Business Unit program, you can use processing options to direct the system to enter the equipment number from the work order.

26.3.8 Processing Options

See [Section 55.12, "Time Entry by Job \(Business Unit\) \(P051161\)"](#).

Review Work Order Information

This chapter contains these topics:

- [Section 27.1, "Reviewing Work Order Information"](#)
- [Section 27.2, "Reviewing Work Order Parts Lists"](#)
- [Section 27.3, "Reviewing Work Order Transactions"](#)
- [Section 27.4, "Reviewing Work Order Costs by Category Code"](#)
- [Section 27.5, "Reviewing Project Costs"](#)
- [Section 27.6, "Reviewing Estimated and Actual Work Order Amounts"](#)

27.1 Reviewing Work Order Information

You can review work order information to help increase productivity and control costs. You can review a variety of information related to your work orders without having to create reports. For example, you might need to review all work orders that are over budget, or review all current costs that are associated with a project to determine future budgeting requirements.

27.1.1 What You Should Know About

Topic	Discussion
Locating additional work order information	You can use Backlog Management or Equipment Backlog to locate and review work orders that match criteria that you specify. See Section 23.2, "Locating Work Orders" .

27.2 Reviewing Work Order Parts Lists

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Parts List Inquiry

Review work order parts lists to view the most current information about the parts requirements of your work orders. Use Parts List Inquiry to review information for individual work orders or a selection of related work orders. You can review the following:

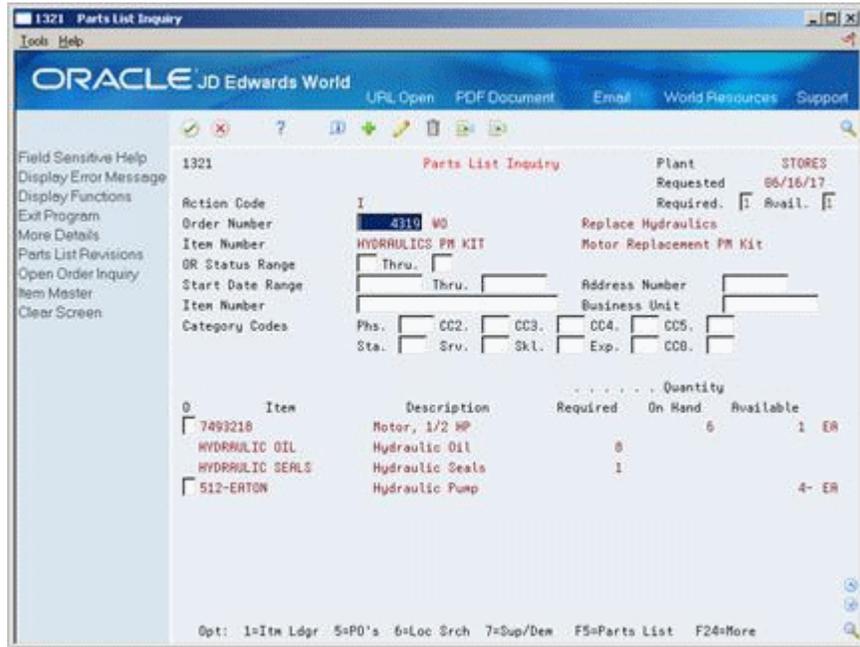
- Parts requirements based on work order status

- Parts requirements based on a specified period of time
- Parts with a negative availability

To review work order parts lists

On Parts List Inquiry

Figure 27-1 Parts List Inquiry screen



1. Complete the following field to locate the parts list for a specific work order:
 - Order Number

You can search for parts information based on a single work order number or on a combination of the fields in step 2 for multiple work orders, but not on both.
2. Complete any combination of the following fields to search for parts associated with multiple work orders:
 - Status Range From
 - Status Range Thru
 - Start Date Range From
 - Start Date Range Thru
 - Category Codes
 - Item Number
 - Address Number
 - Business Unit
3. Complete the following fields:
 - Required
 - Available

Field	Explanation
Address Number	<p>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.</p> <p><i>Form-specific information</i></p> <p>This address book number corresponds to the address book number entered in the AN8 field on the work order header.</p>
Required	<p>This field indicates whether to display all parts or only those parts with a requirement.</p> <p>1 – Display all parts.</p> <p>2 – Display only those parts with a requirement.</p>
Avail	<p>This field indicates whether to display all parts or only those parts with a negative availability.</p> <p>1 – Display all parts.</p> <p>2 – Display only those parts with a negative availability.</p>

27.2.1 What You Should Know About

Topic	Discussion
Determining supply and demand	To determine which work orders are creating a demand for a part, choose Supply/Demand for the part. The Supply/Demand window opens, from which you can choose to review the associated work orders.

27.2.2 Processing Options

See [Section 55.13, "Parts List Inquiry \(P1321\)"](#)

27.3 Reviewing Work Order Transactions

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Cost by Work Order

Review work order transactions to track specific costs at the individual work order level. Use Cost by Work Order to review all posted and unposted general ledger transactions associated with a work order.

You can use date selections to limit the number of transactions that appear. You can also specify a ledger type to review actual amounts or budget amounts.

27.3.1 Before You Begin

- Verify that Summary Document Types (user defined code 48/DC) are set up. See [Chapter 36, "Set Up User Defined Codes"](#).

To review work order transactions

On Cost by Work Order

Figure 27–2 Cost by Work Order screen



1. Complete the following field:
 - W.O. Number
2. Complete the following fields to limit the range and type of G/L transactions displayed:
 - From Date/Period
 - Thru Date/Period
 - Ledger Type
3. Choose the More Details function to review the following information:
 - Document Type
 - Document Number
 - Account Number
 - Batch Number/Date
 - User ID
 - Item (Part Number)
 - Description

Field	Explanation
Units	The quantity of something that is identified by a unit of measure. For example, it can be the number of barrels, boxes, cubic yards, gallons, hours, and so on. <i>Form-specific information</i> In this case, the number of hours charged against a work order.

Field	Explanation
Rate	<p>A number that represents the number of units multiplied by the unit cost.</p> <p><i>Form-specific information</i></p> <p>In this case, the amount charged per hour. The system calculates the rate by dividing the amount of the transaction by the hours.</p>
Amount	<p>A number that identifies the actual amount. Type debits with no sign or a plus sign (+). Type credits with a minus sign (-) either before or after the amount. You can use decimals, dollar signs, and commas. The system ignores non-significant symbols.</p> <p><i>Form-specific information</i></p> <p>The current balance of all charges against a work order from the Account Ledger file (F0911) for both posted and unposted transactions. The rate times the hours equals the amount.</p> <p>Note: The amount may not be exact if rounding has been included as part of the calculation.</p>

27.3.2 What You Should Know About

Topic	Discussion
Summarizing by document type	To limit the number of records that display on this screen, you can specify that only certain document types appear. Choose Document Types. If you use this feature, you must specify all document types that you want to review.

27.4 Reviewing Work Order Costs by Category Code

Navigation

From Equipment/Plant Management (G13), choose **Equipment Work Orders**

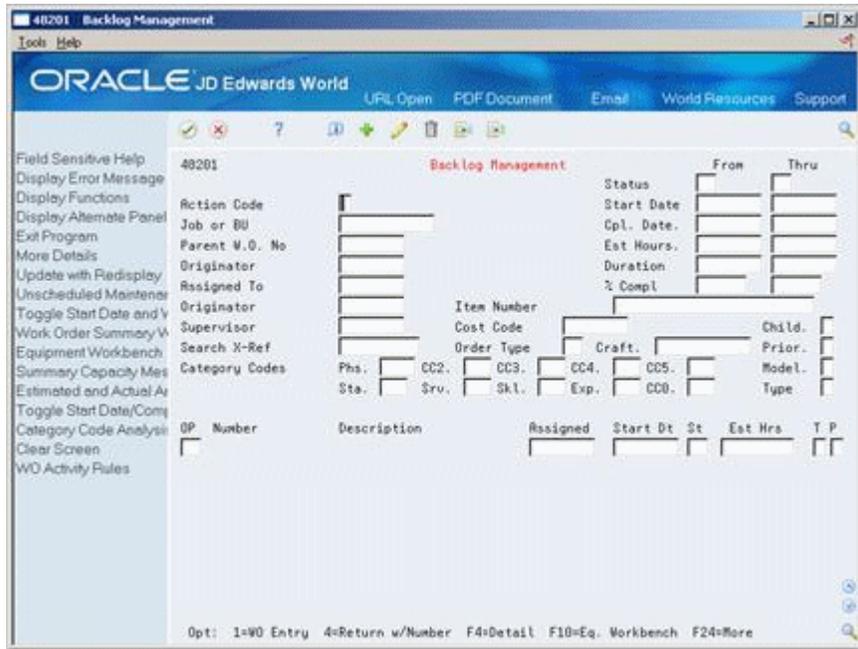
From Equipment Work Orders (G1316), choose **Backlog Management**

You can review work order costs that are summarized based on work order category codes. This is especially useful to review the number of work orders and the associated costs, based on the category of work order and the characteristics of the work performed. For example, assume that you designate a work order category code to represent equipment failures, with each code assigned to represent a different type of failure, such as inadequate lubrication, operator error, and so on. When you review work order costs by that category code, a summary of work order costs appears that also includes the number of work orders for each type of failure that you define.

To review work order costs by category code

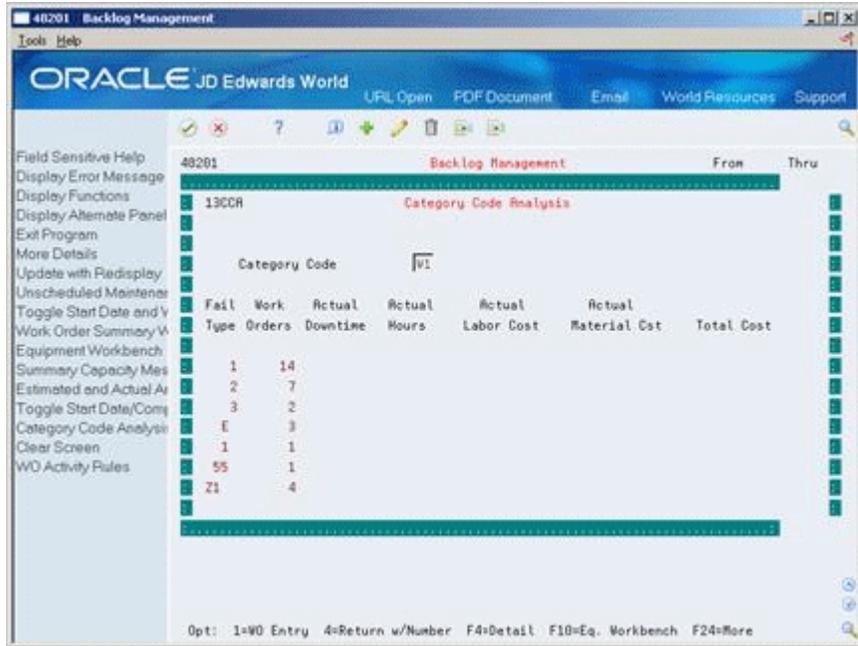
On Backlog Management

Figure 27-3 Backlog Management screen



1. Choose Category Code Analysis Window. The Category Code Analysis fields display.

Figure 27-4 Category Code Analysis window



2. Complete the following field:
 - Category Code

Field	Explanation
Category Code	Identifies the table that contains user defined codes for work order failure. The system uses the table you specify to summarize work order failure codes based on work order selection from the Backlog Management screen (P48201). <i>Form-specific information</i> Identifies the work order category code for which you want to review work order costs.

27.4.1 What You Should Know About

Topic	Discussion
Equipment Backlog	You can access Category Code Analysis from Equipment Backlog. Choose Category Code Analysis Window.
Selection criteria	Costs for all work orders on Category Code Analysis appear, regardless of any selection criteria on Backlog Management or Equipment Backlog,

27.5 Reviewing Project Costs

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Cost by Parent Work Order

You can review all costs associated with a project. When you set up a project, you establish a hierarchy of work orders based on a parent work order. Use Cost by Parent Work Order to review the total project amount and hours at the parent work order level, with individual work orders summarized as follows:

- Estimated amount or hours
- Actual amount or hours
- Variance between estimated and actual

You review costs by amounts or hours. After you review a summary of costs for the parent work order, you can review detailed costs for each work order in the project.

To review project costs

On Cost by Parent Work Order

Figure 27-5 Cost by Parent Work Order screen

Order Number	Description	Estimated Amount	Actual Amount	Amount Variance
122841	Plant Shutdown - Area 2			
122850	Teardown Line #1	5,350.00	5,455.13	105.13-
122868	Retool Line #1	11,550.00	12,556.09	1,006.09-
122876	Clean Line #1	1,000.00	995.50	3.50
122884	Test Line #1	3,550.00	3,618.97	68.97-
122892	Teardown Line #2	8,675.00	688.79	7,986.21
122905	Retool Line #2	16,500.00		16,500.00
122913	Clean Line #2	1,000.00		1,000.00
122921	Test Line #2	6,000.00		6,000.00
Total:		59,625.00	29,315.48	30,309.52

1. Complete the following field:
 - Order Number
 Information for all child work orders appears.
2. To toggle between display formats, choose Hours/Amount.

27.5.1 What You Should Know About

Topic	Discussion
Reviewing individual work orders	Choose Work Order Cost Detail to review costs for each work order in the project. See Section 27.3, "Reviewing Work Order Transactions" .

27.6 Reviewing Estimated and Actual Work Order Amounts

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Work Orders**

From **Equipment Work Orders (G1316)**, choose **Estimate to Actual Variance**

Use Estimate to Actual Variance to review and analyze labor costs for each operation sequence charged to a work order. In addition, you can review:

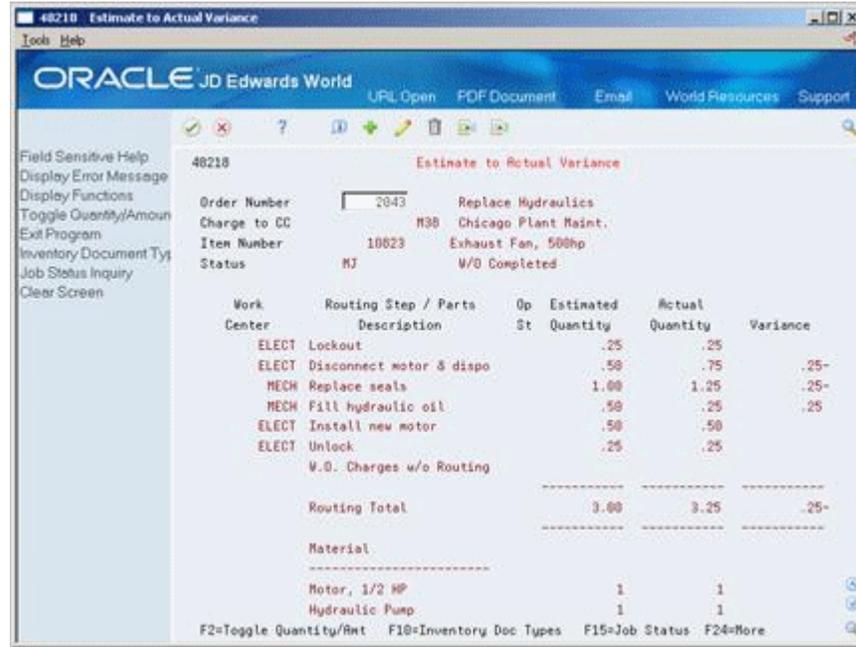
- Total labor amounts or hours charged to a work order.
- Individual parts amounts charged to a work order.
- Total parts amounts charged to a work order.
- All miscellaneous costs charged to a work order, such as an accounts payable voucher for an outside service.

- A comparison of actual amounts with estimated amounts. You can review quantities or currency amounts.

To review estimated and actual work order amounts

On Estimate to Actual Variance

Figure 27–6 Estimate to Actual Variance screen



1. Complete the following field:
 - Order Number
2. To toggle between display formats, choose Toggle Quantity/Amount.

27.6.1 What You Should Know About

Topic	Discussion
Estimated amounts for parts and routings	If the work order that you review does not include a parts list or labor routing instructions, the system uses the estimated amounts from Work Order Cost Summary.
Actual amounts for routings	<p>To review actual amounts for a specific routing, you must enter the operation sequence when you enter time against a work order through Time Accounting.</p> <p>If you do not use routings and equipment constants are set up to allow you to enter actual amounts on the Work Order Cost Summary window, those amounts appear. If equipment constants do not allow entry of actual amounts, labor amounts appear, based on payroll transactions from the following tables:</p> <ul style="list-style-type: none"> ■ Payroll Transaction History Table (F0618) ■ Employee Transaction Detail Table (F06118)

Topic	Discussion
Actual amounts for parts and materials	<p>To review actual amounts for parts and materials, you must set up inventory document types (user defined code 48/ID).</p> <p>If you do not use parts lists and equipment constants are set up to allow you to enter actual amounts on the Work Order Cost Summary window, those amounts appear. If equipment constants do not allow entry of actual amounts, amounts for parts and materials appear, based on inventory transactions from the Item Ledger table (F4111).</p> <p>See Chapter 36, "Set Up User Defined Codes".</p>
Actual amounts for miscellaneous costs	<p>If equipment constants are set up to allow you to enter actual amounts on the Work Order Cost Summary window, those amounts. If equipment constants do not allow entry of actual amounts, miscellaneous amounts from general ledger transactions appear.</p>
Reviewing shop costs by repair code	<p>You can access Shop Cost by Repair Code from Estimate to Actual Variance by choosing Job Status. The Job Status Inquiry screen appears. This screen is identical to the Shop Costs by Repair Code screen. The system enters the job number (business unit) and subledger (work order number) from the Estimate to Actual Variance screen.</p> <p>See Section 10.5, "Reviewing Shop Costs by Repair Code" for more information.</p>

27.6.2 Processing Options

See [Section 55.14, "Budget to Actual Variance \(P48218\)"](#).

Part IV

Maintenance Planning

This part contains these chapters:

- [Chapter 28, "Overview to Maintenance Planning"](#)
- [Chapter 29, "Work with PM Projections"](#)
- [Chapter 30, "Generate a Parts Plan"](#)
- [Chapter 31, "Review the Parts Plan"](#)
- [Chapter 32, "Generate a Labor Plan"](#)
- [Chapter 33, "Work with the Labor Plan"](#)

Overview to Maintenance Planning

This chapter contains these topics:

- [Section 28.1, "Objectives"](#)
- [Section 28.2, "About Maintenance Planning"](#)

28.1 Objectives

- To understand the maintenance planning process
- To run and review PM projections
- To generate parts and labor plans
- To review and respond to system-generated planning messages

28.2 About Maintenance Planning

Use the maintenance planning features of the Equipment/Plant Management system to accurately forecast parts and labor resources needed to complete your maintenance tasks. Use maintenance planning to minimize equipment downtime by ensuring that the necessary parts, materials, and maintenance personnel are available when a piece of equipment requires maintenance.

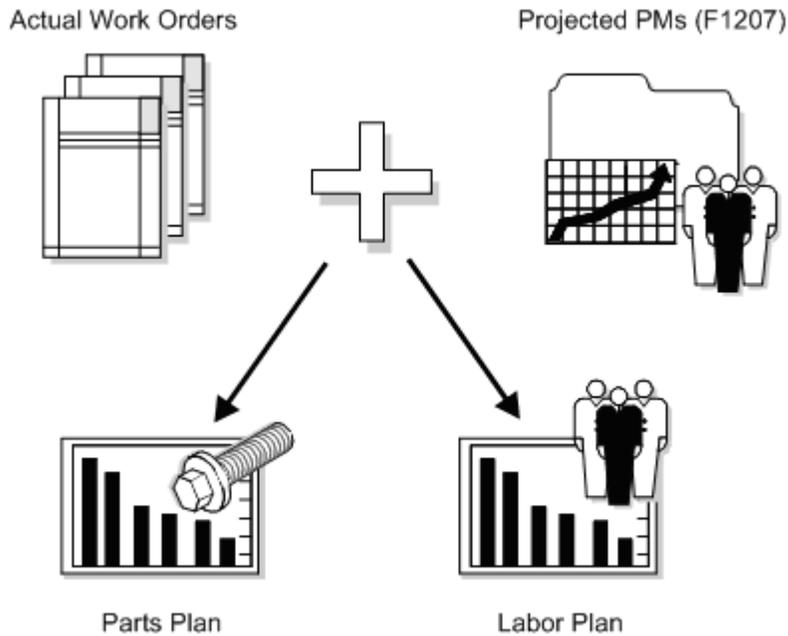
When you use maintenance planning, you define a range of maintenance work orders for which the system projects parts requirements and labor requirements. Additionally, you can integrate this information with forecasted (planned) work orders that the system generates when you run a PM projection.

After the system generates a PM projection, you can:

- Review information from the PM projection
- Generate a parts plan
- Respond to system recommendations for purchasing parts and materials
- Generate a labor plan
- Revise a labor plan to accommodate available resources

The following graphic shows the elements that the system uses to generate parts and labor plans:

Figure 28-1 Elements Used to Generate Parts and Labor Plans



This section describes features and functions that depend on the installation of the complete Equipment/Plant Management system. To be able to use Maintenance Planning, you must have purchased and installed the following systems:

- 30 - Product Data Management
- 31 - Shop Floor Control
- 33 - Resource and Capacity Planning
- 34 - Material Planning
- 40 - Inventory Base and Order Processing
- 41 - Inventory Management
- 43 - Procurement

Check with your system administrator to verify which systems you have purchased and installed.

Maintenance planning consists of the following tasks:

- Working with PM projections
- Generating a parts plan
- Reviewing the parts plan
- Generating a labor plan
- Working with the labor plan

28.2.1 PM Projections

When you run the PM projection, you can use the information that the system generates to help plan your maintenance activities. You specify the time period for which you want the system to forecast when equipment requires maintenance. The PM projection includes the following information:

- All equipment that requires maintenance
- The dates when the equipment will require maintenance
- The parts and materials required for the maintenance
- The estimated amount of time required to perform the maintenance

PM Projections uses information from the equipment masters and the equipments' preventive maintenance schedules to update the following tables:

Table	Description
PM Projections (F13411)	<p>This table stores the following information:</p> <ul style="list-style-type: none"> ■ Equipment numbers ■ Service types associated with the equipment ■ Projected start dates for each service type ■ Estimated hours for each service type ■ Estimated parts and labor costs ■ Forecast type
Forecast (F3460)	<p>This table stores the following information:</p> <ul style="list-style-type: none"> ■ Standard parts list and routing instructions from the model work order associated with a PM ■ Branch where parts are stocked ■ Requested date for maintenance ■ Forecast type ■ Document type

28.2.2 Parts Plans

Use the parts plan to review the availability of required parts. When you generate a parts plan, the system generates messages which you should review to identify various parts planning needs. For example, you review parts messages to determine the quantity needed for a particular part at a future date. You can also direct the system to create purchase orders for parts currently not on hand, but needed in the future.

28.2.3 Labor Plans

Use the labor plan to review the demands that maintenance tasks place on your labor resources. When you generate a labor plan, the system generates messages that alert you to over-capacity or under-capacity conditions. You can adjust your labor resources accordingly or reschedule selected maintenance tasks to alleviate the over- or under-capacity conditions.

Work with PM Projections

This chapter contains these topics:

- [Section 29.1, "Working with PM Projections"](#)
- [Section 29.2, "Running the PM Projection Batch Update"](#)
- [Section 29.3, "Reviewing PM Projections"](#)

29.1 Working with PM Projections

You can use PM Projections to collect and review detailed information about future maintenance tasks. For example, depending on the time period that you specify, you can review:

- All future maintenance for a piece of equipment or a class of equipment
- All future maintenance tasks by service type
- All future maintenance tasks at a specific location

29.2 Running the PM Projection Batch Update

Navigation

From **Equipment/Plant Management (G13)**, choose **Maintenance Planning**

From **Maintenance Planning (G1322)**, choose **PM Projection Batch Update**

Run the PM Projection Batch Update program to forecast parts and labor requirements for future PMs. When you run this program, you specify the dates for which you want the projection to apply.

The system uses information from a joined table based on the Equipment Master table (F1201) and the Maintenance Schedule table (F1207; specifically, the estimated occurrences value and the last completed date for each service type) to determine when a piece of equipment will be due for maintenance. The system also uses parts and labor resource information from the model work order to determine future parts and labor requirements.

When you run the PM Projection Batch Update, the system updates the following tables:

Table	Description
PM Projections (F13411)	The system uses information from this table to calculate values for the PM Projection Inquiry and the PM Projection Report.

Table	Description
Forecast table (F3460)	The system uses values from this table to calculate parts and labor requirements for projected PMs.

Note: You must have purchased and installed Requirements Planning (system 34) and Capacity Requirements Planning (system 33) to use parts and labor planning functions. In addition, you must associate model work orders with PM schedules to supply the system with the necessary data to determine parts and labor requirements.

When you select PM Projection Batch Update, the system displays a versions list. The versions list includes DEMO versions that you can run or copy and modify to suit your needs. When you run a version, the system displays Processing Option Revisions before submitting the job for processing.

After you select the appropriate processing options, the system displays a message that the job was submitted to batch.

29.2.1 Before You Begin

- Create model work orders for PM schedules. See [Section 15.6, "Creating a Model Work Order"](#)

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about running, copying, and changing DREAM Writer versions

29.2.2 Processing Options

See [Section 56.1, "PM Projections \(P13411\)"](#)

29.3 Reviewing PM Projections

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose PM Projection Inquiry

You can use PM Projection Inquiry to review detailed information about future PMs. For example, you can review:

- Projected dates for PMs
- Projected service types for specific pieces of equipment
- Estimated hours for each service type

You can use any of the following types of information to limit the PM information that the system displays:

- Schedule dates
- Service types
- Equipment location
- Equipment number

- Category codes

To review PM projections

On PM Projection Inquiry

Figure 29–1 PM Projection Inquiry screen

Item Number	Service Type	Description	Schedule Date	Estimated Hours
00001006	HALON	Halon Inspection	01/03/17	
00001006	HALON	Halon Inspection	04/04/17	
00001006	HALON	Halon Inspection	07/03/17	
00001006	HALON	Halon Inspection	10/01/17	
00001006	HALON	Halon Inspection	12/30/17	
00001006	WINDOW	Window Washing	02/03/17	
00001006	WINDOW	Window Washing	06/03/17	
00001006	WINDOW	Window Washing	10/01/17	

1. Complete the following field:
 - Forecast Type
2. To limit your search to specific PM projection information, complete any of the following fields:
 - Service Type From and Thru
 - Service Date From and Thru
 - Location
 - Item Number
 - Category Codes

29.3.1 What You Should Know About

Topic	Discussion
Reviewing and revising projected PMs	<p>You can review and revise information about projected PMs. From the MPS Daily Operations menu (G3412), choose Enter/Change Detail Forecast. From this screen you can:</p> <ul style="list-style-type: none"> ■ Manually revise forecast information for an existing projection ■ Add or delete a parts forecast ■ Enter descriptive text for the forecast <p>You can access forecasts that you want to revise by item number, branch plant, forecast type, or any combination of these elements. If your forecast is extensive, you can specify a beginning request date to limit the amount of information that the system displays.</p> <p><i>Form-specific information</i></p> <p>When you revise information on Enter/Change Detail Forecast, the changes you make only affect the Forecast table (F3460). They do not affect the PM Projections table (F13411).</p> <p>See Revising Detail Forecasts in the <i>JD Edwards World Manufacturing and Distribution Planning Guide</i> for more information.</p>

Generate a Parts Plan

This chapter contains this topic:

- [Section 30.1, "Generating a Parts Plan"](#)

30.1 Generating a Parts Plan

Navigation

From **Equipment/Plant Management (G13)**, choose **Maintenance Planning**

From **Maintenance Planning (G1322)**, choose **Material Planning**

From **Material Planning (G1323)**, choose **Plan Generation**

You can generate a parts plan to assist you in planning parts and materials requirements for work orders. When you generate a parts plan, the system compares the parts inventory you have on hand with the parts needed for work orders. The system determines parts requirements for actual work orders, such as work orders generated for corrective maintenance, and forecasted (planned) work orders.

Based on this comparison, the system determines the availability of the parts needed for work orders. The system also generates messages that you can review to ensure that the right parts are available when they are needed. The messages include the following recommendations:

- Which parts and materials you should order
- When you should place orders for parts
- What quantity you should order
- Whether you should cancel, defer, expedite, or increase existing orders

You use processing options to define a planning horizon for the parts plan. A planning horizon refers to the period for which a plan applies and how the period is ordered for display purposes. For example, you can generate a parts plan with a six-month planning horizon ordered as follows:

- Days - 14
- Weeks - 7
- Months - 4

You can include up to 52 periods in a planning horizon.

When you review part availability by time, the system uses the planning horizon as the basis for the parts projection information it displays.

When you run Plan Generation, the system displays Processing Option Revisions before submitting the job for processing.

After you select the appropriate processing options, the system displays a message that the job was submitted to batch.

30.1.1 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to generate a parts plan:
 - · System 30 - Product Data Management
 - · System 31 - Shop Floor Control
 - · System 34 - Material Planning
 - · System 40 - Inventory Base and Order Processing
 - · System 41 - Inventory Management
 - · System 43 - Procurement
- Verify that the workday calendar has been set up for the time period for which you want to generate the parts plan. If your parts planning requires order lead time, you must account for backward and forward scheduling to accommodate the lead time. See [Section 39.2.3, "Setting Up the Workday Calendar"](#).

30.1.2 What You Should Know About

Topic	Discussion
Deleting previous planning messages	Every time you generate a parts plan, the system deletes all previous messages regarding parts availability. The system also deletes all detail messages for the parts you specify, except: <ul style="list-style-type: none"> ■ Messages you direct the system to hold ■ Messages you enter manually See Section 31.3, "Working with Parts Detail Messages" for more information about holding messages or entering messages manually.
Inventory item balance records	In order for the system to include an inventory part when the system calculates part availability, the inventory part must have an item balance record. See Appendix A, "Inventory Concepts and Setup" for more information about inventory records.
Inventory commitments	Work order commitments are determined by the work order activity rules. The Commit field is used to determine if inventory is committed at a specific status. Inventory is automatically committed when the status is changed on the work order to a commit status. Hard and soft commitments are determined by the hard/soft commitment flag in the manufacturing constants.
Ensuring accurate planning information	To ensure accurate information when you generate a parts plan, other system users should not access programs that use inventory or planning tables.

See Also:

- *Generating a Material Requirements Plan in the JD Edwards World Manufacturing and Distribution Planning Guide* for more information about defining a plan generation
- *JD Edwards World Technical Foundation Guide* for more information about running, copying, and changing DREAM Writer versions

Review the Parts Plan

This chapter contains these topics:

- Section 31.1, "Reviewing the Parts Plan"
- Section 31.2, "Reviewing Parts by Planning Family"
- Section 31.3, "Working with Parts Detail Messages"
- Section 31.4, "Reviewing Parts Availability by Time"
- Section 31.5, "Reviewing Part Supply and Demand"
- Section 31.6, "Reviewing Component Part Information"
- Section 31.7, "Reviewing and Revising Part Cross-References"

31.1 Reviewing the Parts Plan

When the system generates a parts plan, it updates several screens and generates a variety of messages. You can review these screens and messages to plan the parts requirements for your maintenance tasks. The screens and messages include information on planning family, inventory parts details and availability, supply and demand, component parts, and cross-reference information.

31.1.1 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to review parts plans:
 - · System 30 - Product Data Management
 - · System 31 - Shop Floor Control
 - · System 34 - Material Planning
 - · System 40 - Inventory Base and Order Processing
 - · System 41 - Inventory Management
 - · System 43 - Procurement

31.2 Reviewing Parts by Planning Family

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Material Planning

From Material Planning (G1323), choose Review Planning Family

You can review information about parts according to the person or planning family responsible for the parts. For example, you can review parts information by:

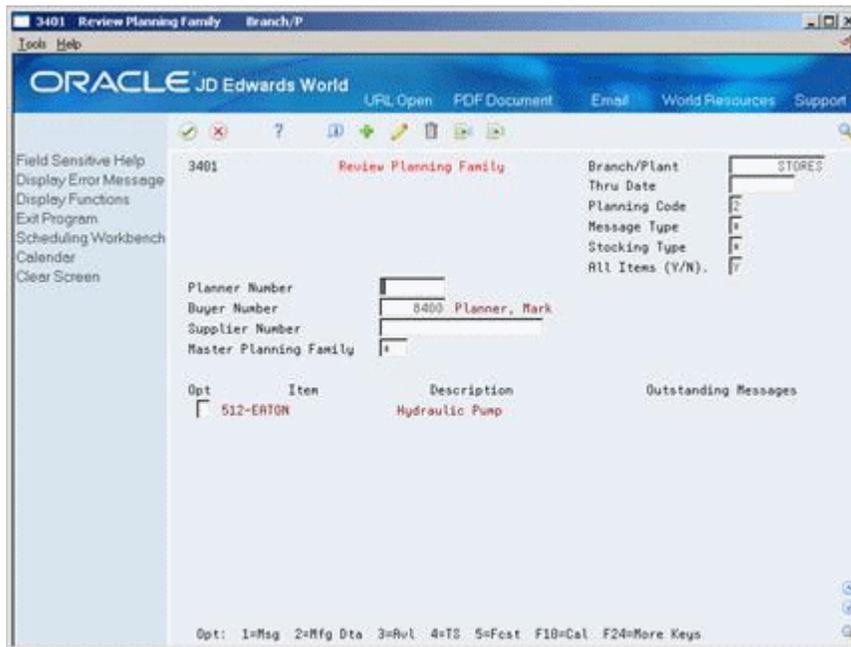
- Planner
- Buyer
- Supplier
- Master planning family

When you choose the person or planning family for which you want to review parts information, all parts associated with the person or planning family that have outstanding messages appear. You can specify the type of messages that you want to appear.

To review parts by planning family

On Review Planning Family

Figure 31–1 Review Planning Family screen



1. Complete the following field:
 - Branch/Plant

This field might already contain a default value.
2. To limit your search to a particular planning family, complete any of the following fields:
 - Planner Number
 - Buyer Number
 - Supplier Number
 - Master Planning Family

3. To limit the amount of information that appears, complete any combination of the following fields:
- Thru Date
 - Planning Code
 - Message Type
 - Stocking Type
 - All Items

Field	Explanation
Buyer Number	The address number of the person responsible for setting up and maintaining the correct stocking levels for the item.
Supplier Number	The address book number of the preferred provider of this item. You can enter the number for the supplier or you can have the system enter it each time that you receive the item from a supplier. You specify whether the system enters the supplier using processing options for Enter Receipts.
Master Planning Family	A code (table 41/P4) that represents an item property type or classification, such as commodity type, planning family, or so forth. The system uses this code to sort and process like items. This field is one of six classification categories available primarily for purchasing purposes.
Planning Code	A code that indicates how Master Production Schedule (MPS), Material Requirements Planning (MRP), or Distribution Requirements Planning (DRP) processes this item. Valid codes are: 0 – Not Planned by MPS, MRP, or DRP 1 – Planned by MPS or DRP 2 – Planned by MRP 3 – Planned by MRP with additional independent forecast 4 – Planned by MPS, Parent in Planning Bill 5 – Planned by MPS, Component in Planning Bill These codes are hard-coded. <i>Form-specific information</i> Equipment/Plant Management users must enter a 2 for Maintenance Planning.

Field	Explanation
Message Type	<p>A code that distinguishes different messages generated in the Distribution Requirements Planning/Master Production Schedule/Material Requirements Planning system. Valid codes are:</p> <p>A – Warning messages (user controlled) B – Order and expedite C – Cancel D – Defer E – Expedite F – Frozen order (user controlled) G – Increase order quantity to (user controlled) H – Decrease rate quantity to I – Increase rate quantity to L – Decrease order quantity to (user controlled) M – Manual reminder N – Create rate O – Order P – Firm order S – FPO adjustment suggestion T – Past due order</p> <p><i>Form-specific information</i></p> <p>If you are on the Message Type field at the top of this screen, you can enter a specific message type code to display only detail about that type of message.</p>
Stocking Type	<p>A user defined code (41/I) that indicates how you stock an item (for example, as finished goods, or as raw materials). The following stocking types are hard-coded and you should not change them:</p> <p>B – Bulk floor stock C – Configured item F – Feature K – Kit parent item N – Non-stock</p>
All Parts (Y/N)	Enter Y to see all items or work centers or N to see only items or work centers with messages associated with them.

31.2.1 Processing Options

See [Section 56.2, "Review Planning Family \(P3401\)"](#)

31.3 Working with Parts Detail Messages

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Material Planning

From Material Planning (G1323), choose Item Detail Messages

When you generate a parts plan, the system produces messages that identify when planning conflicts exist. For example, depending on how you set up your system, if a part's usage exceeds availability, the system produces an order message. You can process the messages according to the system's recommendations, delete them, hold them, or clear them. You can also create your own messages to serve as reminders about particular parts.

The types of messages that the system produces are determined by user defined codes (34/MT). Standard message types include warning messages and planned purchase order messages. Other messages include:

- Expedite an order
- Defer an order
- Increase an order
- Decrease an order

After you review a message, you can do one of the following:

Action	Description
Process the message	Use this command to resolve the planning conflict. When you direct the system to process an order message, it carries out actions to resolve the planning conflict. For example, when you direct the system to process a planned purchase order message, it automatically creates a purchase requisition.
Hold the message	Use this command to resolve the planning conflict at a later time. When you direct the system to hold a message, the system keeps the message active, but does not resolve the planning conflict. After you resolve the planning conflict for which the message applies and you want to clear or delete the message, you must do so manually.
Delete the message	Use this command to delete obsolete messages.
Clear the message	Use this command to prevent the message from appearing. You can retrieve a cleared message by completing the Cleared field.

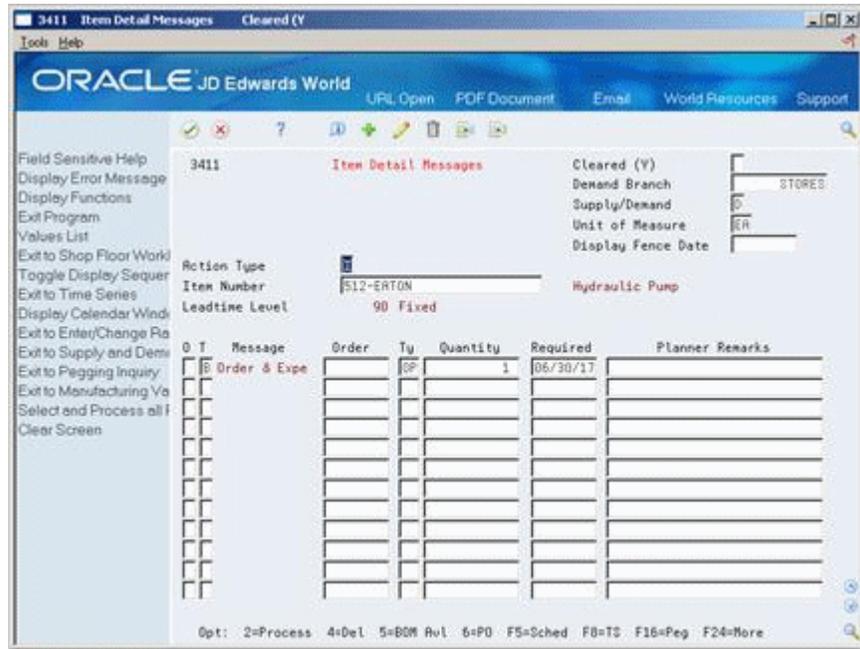
Working with parts detail messages consists of the following tasks:

- To review parts detail messages
- To create a purchase request for a part

To review parts detail messages

On Item Detail Messages

Figure 31–2 Item Detail Messages screen



1. Complete the following fields:
 - Item Number (Part Number)
 - Branch/Plant

The Branch/Plant field might already contain a default value.
2. Complete the following field:
 - Supply/Demand

This field might contain a default value.
3. To review both cleared and outstanding messages, complete the following optional field:
 - Cleared (Y)
4. Choose Process, Hold, Delete, or Clear for each message.

Field	Explanation
Supply/Demand	<p>This field allows you to view messages from the viewpoint of either the supply or demand branch. Changing this field from S to D also changes the Supply Plant field immediately below the Action Code field to Demand Plant.</p> <p>S – Supply branch/plant</p> <p>D – Demand branch/plant</p>

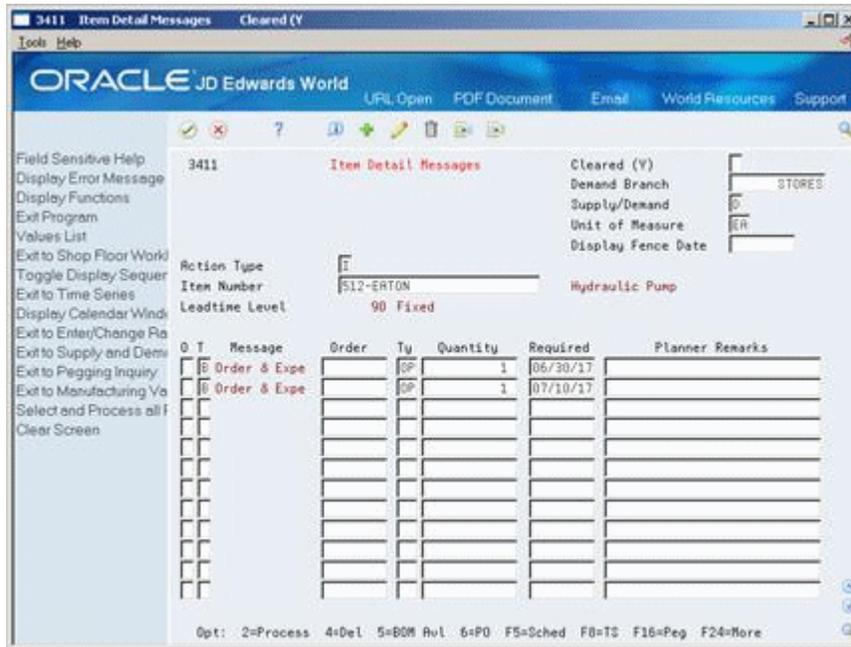
31.3.1 What You Should Know About

Topic	Discussion
Planning family	<p>You can view messages by planning family or individuals within a planning family. You use planning families to group individuals responsible for parts. For example, you can review messages pertaining to:</p> <ul style="list-style-type: none"> ■ Parts for which the maintenance planning family is responsible ■ Parts for which only the buyer is responsible
Inventory parts details	<p>Review parts detail messages when you want to review detailed ordering information about a particular part. The messages include recommendations about when you should order the part. In addition, you can review:</p> <ul style="list-style-type: none"> ■ Inventory locations where the part is needed ■ Required dates ■ Part suppliers <p>After you review the messages, you can take appropriate action on the messages.</p>
Inventory parts availability by time	<p>You can review the activity affecting an inventory part's availability over a time period that you specify. You can review the activity in daily, weekly, or monthly increments. Activity that affects availability includes:</p> <ul style="list-style-type: none"> ■ Beginning available amounts ■ Supplies created by purchase orders ■ Demands created by maintenance work orders
Supply and demand	<p>Review detailed supply and demand information for a particular part. For example, you can review detailed information about a work order that creates a demand for a part or a purchase order that creates a supply for a part.</p>
Component parts	<p>You can review component part information when you want to review all of the standard parts lists (or bills of material) for which a component part is used.</p>
Part cross-reference	<p>You can review part cross-reference information when you want to determine which parts can be used as substitutions or replacements for parts that are not available. You can also review substitute suppliers.</p>
Adding or changing messages	<p>You can add or change any message on Item Detail Messages. You can also direct the system to perform actions on messages that you add or change.</p> <p>See <i>Setting Up Message Types in the JD Edwards World Manufacturing and Distribution Planning Guide</i> for more information about adding or changing messages.</p>
Preventing messages from being deleted	<p>To prevent the system from deleting a system-generated message when you run a new parts plan, you must choose Hold for that message. The system does not delete messages that you specify as held or any messages that you enter manually.</p>

To create a purchase request for a part

On Item Detail Messages

Figure 31–3 Item Detail Messages screen



1. Follow the steps to review parts detail messages in the section above.
2. Choose Process Message for each part for which you want to create a purchase request.
3. Choose Enter.

The message type associated with the part must be a message type for which the system will create a purchase request. For example, if the message that displays for a part is a manual reminder message, the system will not create a purchase request.

4. Choose Exit.

Figure 31–4 Suppliers Selected for Order screen



5. On Suppliers Selected For Order, choose Create Order.
6. To complete the process, choose Exit.

See Also:

- Processing Purchase Order Messages for MRP in the *JD Edwards World Manufacturing and Distribution Planning Guide* for more information about message types that the system will create a purchase request

31.3.2 Processing Options

See [Section 56.4, "Message Detail \(P3411\)"](#)

31.4 Reviewing Parts Availability by Time

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Material Planning

From Material Planning (G1323), choose Item Availability by Time

Use Item Availability by Time when you need to see a projection of inventory activity for a particular maintenance part. The following information displays:

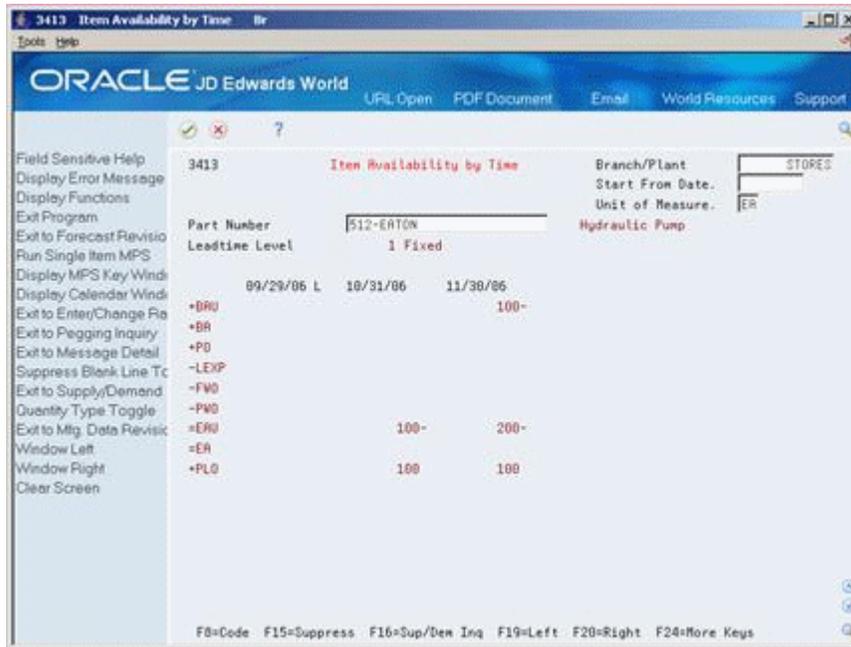
- Projected activity for the part in daily, weekly, or monthly increments, depending on how you set up your planning horizon
- Abbreviations for the activities that affect a part's availability, such as scheduled receipts, demand requirements, and so on

The system derives information for Item Availability by Time from your most recent parts plan generation. You can run a single part plan regeneration to ensure that you have the most recent inventory information for the part.

To review parts availability by time

On Item Availability by Time

Figure 31–5 Item Availability by Time screen



1. Complete the following fields:
 - Item Number (Part Number)
 - Branch/Plant

The Branch/Plant field might already contain a default value.
2. Complete the following optional field:
 - Start From Date

31.4.1 What You Should Know About

Topic	Discussion
Row descriptions	<p>When you review parts information on Item Availability by Time, abbreviated row descriptions appear. Choose Display MPS Key Window to view complete descriptions of the rows.</p> <p>The system provides information about part availability that suggests two scenarios. Row descriptions ending in U (unadjusted), such as BAU, show part availability with the assumption that any outstanding action messages will not be implemented by the responsible planner. Row descriptions that do not end in U, such as BA, show part availability with the assumption that action messages will be implemented.</p>
Suppressing rows without data	<p>You can review only rows that contain data by choosing Suppress Blank Line Toggle. When you choose this function, the system hides all rows that do not contain data.</p>
Updating planning information	<p>You can ensure that the system provides the most current planning information by running a single part plan regeneration. Choose Run Single Item MPS to run a single part plan regeneration.</p>

See Also:

- [Section 30.1, "Generating a Parts Plan"](#) for more information about the planning horizon.

31.4.2 Processing Options

See [Section 56.5, "Time Series \(P3413\)"](#)

31.5 Reviewing Part Supply and Demand

Navigation

From **Equipment/Plant Management (G13)**, choose **Maintenance Planning**

From **Maintenance Planning (G1322)**, choose **Material Planning**

From **Material Planning (G1323)**, choose **Supply/Demand Inquiry**

You can review the individual supply and demand for a particular maintenance part by date. You can also review the documents that affect the supply and demand for a part and take appropriate action.

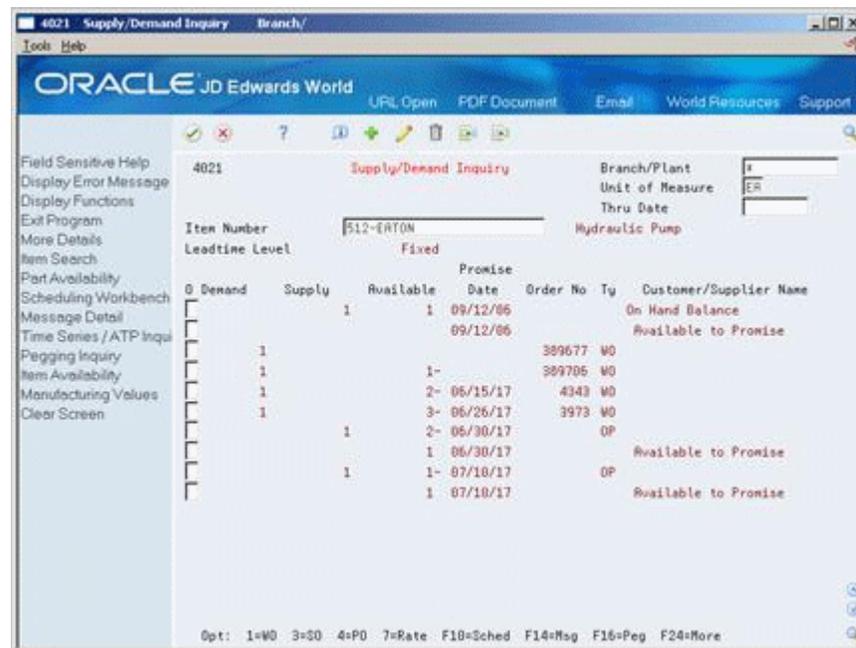
For example, on a particular date, the system might indicate a demand for a part, but no supply. You can review the work order that is creating the demand for the part and create a purchase order to satisfy the demand.

You determine which type of documents the system includes when it calculates supply and demand for a part by setting up supply and demand inclusion rules.

To review part supply and demand

On **Supply/Demand Inquiry**

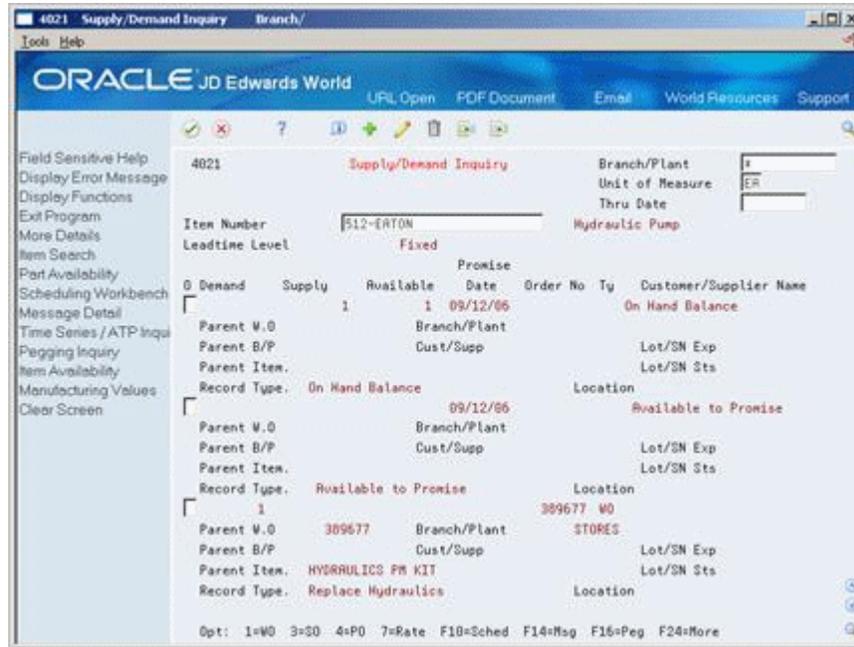
Figure 31–6 Supply/Demand Inquiry screen



1. Complete the following fields:

- Item Number (Part Number)
 - Branch/Plant
- The Branch/Plant field might already contain a default value.
2. Complete the following optional field:
 - Thru Date
 3. To review additional information, choose More Details.

Figure 31–7 Supply/Demand Inquiry screen



31.5.1 What You Should Know About

Topic	Discussion
Reviewing a work order	<p>You can review the work order master for the work order that is creating a demand for a part. Choose Work Order Header to view the work order master.</p> <p>You can also review the work order parts list to which the individual part is attached. Choose Work Order Details to view the work order parts list.</p> <p>When you review work orders or parts lists from Supply/Demand Inquiry, the manufacturing version of the screens displays, which might limit the information that you can review or revise.</p>
Reviewing the purchase order for a part	<p>You can review the purchase order for a part for which the system indicates a supply. Choose Purchase Order Inquiry to review the purchase order.</p>
Creating a purchase order for a part	<p>You can create a purchase order for parts for which a demand exists but for which no supply exists. Choose Purchase Order Entry to create a purchase order.</p>

Topic	Discussion
Searching for a part	If a part is not available, you can search for a part at another location. Choose Item Search to search for alternate part locations.
Reviewing component parts availability	You can review the availability of component parts of an inventory item. Choose Part Availability to review the bill of material for an inventory item. The requested quantity and availability of each component for that item appears.

See Also:

- [Section 38.9, "Setting Up Supply and Demand Inclusion Rules"](#)

31.5.2 Processing Options

See [Section 56.6, "Supply & Demand \(P4021\)"](#)

31.6 Reviewing Component Part Information**Navigation**

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Material Planning

From Material Planning (G1323), choose Where Used Inquiry

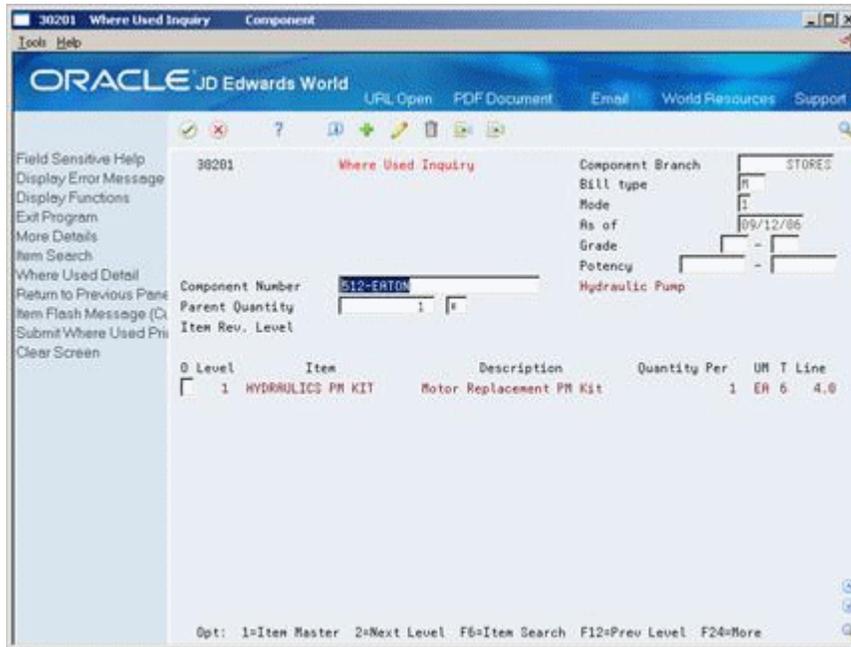
You can review a wide variety of information for all parent assemblies or kits for which a maintenance part is a component. This is particularly useful if you need to locate an alternate source for a component part.

You can also review a list of the work orders that include a particular component on the work order parts list or the pieces of equipment that use a particular part. This is useful if, for example, you have critical information about a part such as recall information, and you need to quickly determine where you have installed the part.

Reviewing component part information consists of the following tasks:

- Reviewing parent information for component parts
- Reviewing where used information by equipment or work order

Figure 31–8 Where Used Inquiry screen



31.6.1 Reviewing Parent Information for Component Parts

When you review parent information for component parts, the system displays each bill of material that includes the component part. The current parent information for a component part appears, but you can indicate that the system show historical or future parent information. You can also:

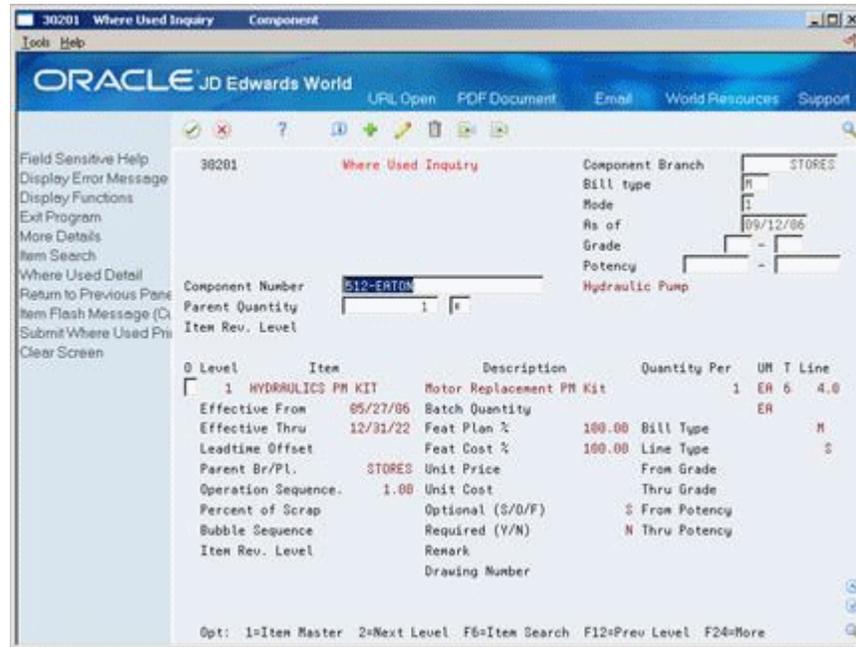
- Review effective dates of each bill of material
- Determine if the component is required or optional for the bill of material
- Review the inventory master information for each parent part

To review parent information for component parts

On Where Used Inquiry

1. Complete the following fields:
 - Component Branch
 - Component Number
2. To limit the information that appears, complete the following optional fields:
 - Mode
 - As of (Date)
3. To review additional information from the standard parts list, choose More Details.

Figure 31–9 Where Used Inquiry screen (Details area)



Field	Explanation
Mode	<p>Indicates the display mode for the bill of material.</p> <p>1 – Single Level Bill of Material. Shows level one (direct) components only.</p> <p>2 – Multi-Level Bill of Material. Shows all levels of components, with proximity to the parent item indicated by level 1, 2, 3, and so forth.</p> <p>3 – Indented Bill of Material. The multi-level bill of material with each level indented for differentiation.</p> <p>You can also set this value in the processing options.</p>
As of	<p>This field is used for effectivity checking. Enter a specific date to display documents (orders, bills of material, routings, as applicable) that are effective on or after that date. The current system date is the default, but you can enter any future or past date.</p>

31.6.2 Reviewing Where Used Information by Equipment or Work Order

You can review a list of the work orders that include a particular component on the work order parts list or the pieces of equipment that use a particular component. This is useful if, for example, you have critical information about a part such as recall information, and you need to quickly determine where you have installed the part.

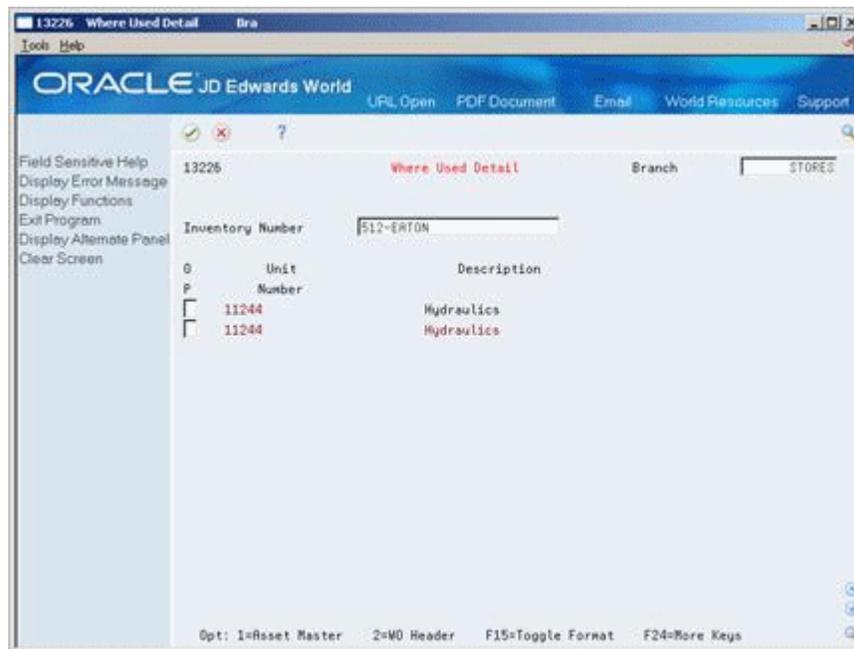
To review where used information by equipment or work order

On Where Used Inquiry

1. Complete the following fields:
 - Component Branch
 - Component Number

2. To limit the amount of information that appears, complete the following optional fields:
 - Mode
 - As Of (Date)
3. To review the equipment or work orders that use the component part, choose Where Used Detail.
4. To review parent information for a component by equipment or work order, choose Where Used Detail.

Figure 31–10 Where Used Detail screen



5. On Where Used Detail, choose Toggle Equipment/Work Order to review information either by equipment or by work order.

31.6.3 Processing Options

See [Section 56.7, "Where Used Inquiry \(P30201\)"](#)

31.7 Reviewing and Revising Part Cross-References

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Material Planning

From Material Planning (G1323), choose Item Cross-Reference

You can use part cross-references to track your maintenance parts in a variety of ways. When you set up part cross-references, you assign cross-reference types to each part. For example, you can assign cross-reference types for:

- Replacements for discontinued parts

- Substitute parts
- Alternate suppliers
- Alternate part numbers

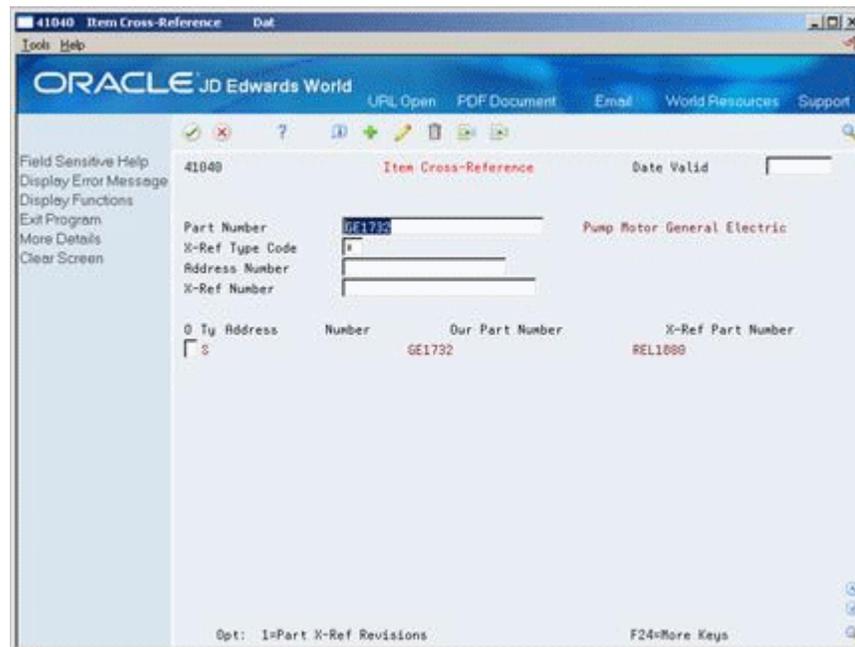
You can make changes to cross-reference information as new information becomes available. This is particularly useful when you need to access the most current information about a part. You can add or revise the following cross-reference information for a part:

- Cross-reference type code
- Address number
- Cross-reference part number
- Cross-reference description

To review and revise part cross-references

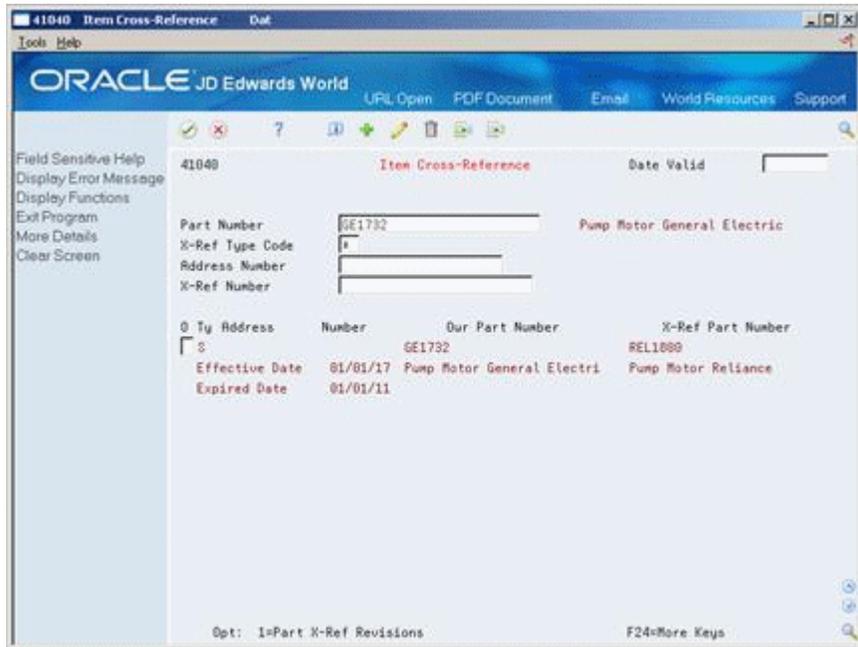
On Item Cross-Reference

Figure 31–11 Item Cross-Reference screen



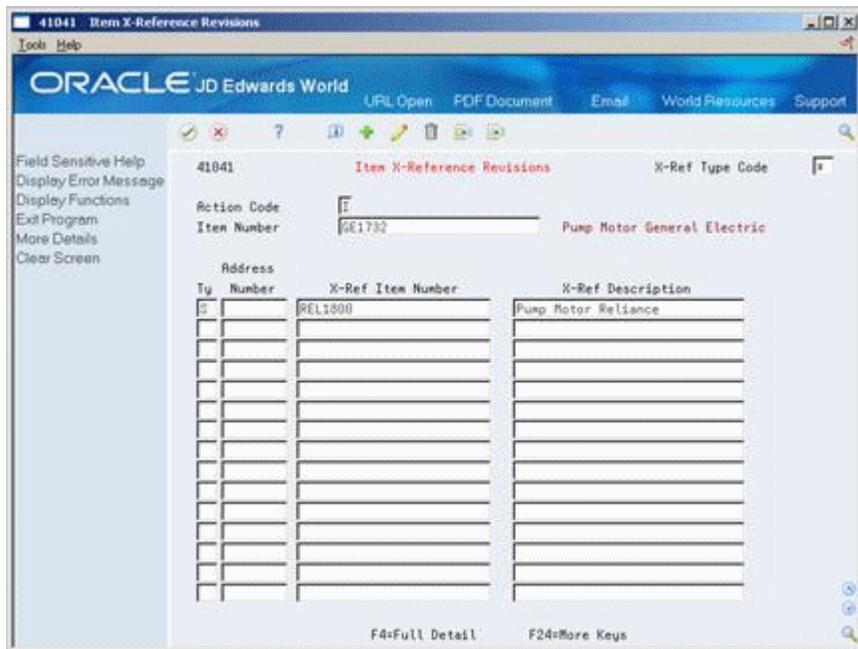
1. Complete the following field:
 - Item Number (Part Number)
2. Complete the following optional fields:
 - Date Valid
 - Cross-Reference Type Code
 - Address Number
 - Cross-Reference Number
3. To review effective dates and additional cross-reference description, choose More Details.

Figure 31–12 Item Cross-Reference screen (Details area)



4. Choose Part X-Ref Revisions.

Figure 31–13 Item X-Reference Revisions screen



5. On Item X-Reference Revisions, revise any of the appropriate fields.

Field	Explanation
X-Ref Type Code	<p>A code (UDC table 41\DT) that identifies the type of cross-reference you have set up for this customer. The system contains examples for:</p> <ul style="list-style-type: none">■ Substitutes■ Replacements■ Bar Codes■ Customer Numbers■ Supplier Numbers
X-Ref Number	<p>The cross-reference item number that the system assigns to an item number. A cross-reference number allows you to use a supplier's item number if it is different from your own item number when you are processing or printing an order.</p>

Generate a Labor Plan

This chapter contains this topic:

- [Section 32.1, "Generating a Labor Plan"](#)

32.1 Generating a Labor Plan

Navigation

From **Equipment/Plant Management (G13)**, choose **Maintenance Planning**

From **Maintenance Planning (G1322)**, choose **Labor Planning**

From **Labor Planning (G1324)**, choose **Labor Plan Generation**

You can generate a labor plan to assist you in planning labor resources for your maintenance tasks. When you generate a labor plan, the system compares available labor resources with the labor resources required by forecasted (planned) work orders and actual (firm) work orders. Based on this comparison, the system generates messages that alert you to over-capacity and under-capacity conditions.

Condition	Description
Over-capacity	When the system identifies an over-capacity condition, fewer labor resources are available than needed. You must adjust your resources or reschedule the sequence of maintenance tasks to correct an over-capacity condition.
Under-capacity	When the system identifies an under-capacity condition, it indicates that your labor resources are not being utilized to their full potential. You should adjust your resources or reschedule the sequence of maintenance tasks in order to better utilize your labor resources.

Ideally, you adjust your resources and schedule your maintenance tasks to achieve a 100-percent capacity throughout your maintenance organization.

When you run the Labor Plan Generation program, the system displays Processing Option Revisions before submitting the job for processing.

After you select the appropriate processing options, the system displays a message that the job was submitted to batch.

32.1.1 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to generate a labor plan:

- · System 30 - Product Data Management
- · System 31 - Shop Floor Control
- · System 33 - Resource and Capacity Planning
- · System 34 - Material Planning
- · System 40 - Inventory Base and Order Processing
- · System 41 - Inventory Management
- You must generate a parts plan before you generate a labor plan. See [Section 30.1, "Generating a Parts Plan"](#).

32.1.2 What You Should Know About

Topic	Discussion
Deleting previous planning messages	<p>Every time you generate a labor plan, the system deletes all previous capacity messages, except:</p> <ul style="list-style-type: none"> ■ Messages that you direct the system to hold ■ Messages that you enter manually <p>See Section 33.2, "Reviewing Labor Messages" for more information about holding messages or entering messages manually.</p>
Setting up critical work centers	<p>A critical work center is a work center that you want the system to include as a demand for labor resources when the system processes a labor plan. When you are selecting data for Labor Plan Generation, JD Edwards World recommends that you set critical work centers not equal to 4.</p> <p>See "Setting Up Work Centers" for more information about setting up critical work centers.</p>

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about running, copying, and changing DREAM Writer versions

Work with the Labor Plan

This chapter contains these topics:

- [Section 33.1, "Working with the Labor Plan"](#)
- [Section 33.2, "Reviewing Labor Messages"](#)
- [Section 33.3, "Reviewing Capacity Load"](#)
- [Section 33.4, "Revising Labor Resources"](#)

33.1 Working with the Labor Plan

When the system generates a labor plan, it updates several forms and generates a variety of messages. You can review these forms and messages to plan the resource units needed to complete your maintenance tasks. The forms and messages include the following information:

Information	Description
Labor messages	You can quickly identify over-capacity and under-capacity conditions by reviewing labor messages. You can review messages for an individual work center or for a dispatch group. A dispatch group is a group of related work centers that report to one business unit. Dispatch groups enable you to organize work centers according to common functions, similar operations, or steps in routing.
Capacity load	You can use capacity load to analyze the difference between the required labor resources (load) and the available labor resources (capacity) for any time period that you specify. You can review load versus capacity for a dispatch group or for individual work centers within the dispatch group. You can review detailed information by date, or you can view a bar graph that summarizes over-capacity and under-capacity conditions by date.
Period summary	You can review detailed information about the work orders scheduled to be completed within a period that you specify. You can also review a summary of the total capacity load for all work orders within a period.

33.1.1 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to review and revise labor plans:
 - System 30 - Product Data Management

- · System 31 - Shop Floor Control
- · System 33 - Resource and Capacity Planning
- · System 34 - Material Planning
- · System 40 - Inventory Base and Order Processing
- · System 41 - Inventory Management

33.2 Reviewing Labor Messages

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Labor Planning

From Labor Planning (G1324), choose Review Dispatch Group

Labor messages identify any labor resource conflicts. For example, you might have scheduled too many maintenance tasks for a work center without enough technicians to perform the work.

You can review the following types of labor messages:

Message	Description
Messages by dispatch group	Use Review Dispatch Group to quickly identify work centers that are over or under capacity. You can review messages for all work centers in a dispatch group or for a specific work center.
Capacity messages by work center	Use Capacity Messages to review detailed capacity requirements for each work center. You specify the time period for which you want to review capacity requirements. The system provides information that you can use to balance loads across machines or work centers. You can also use the information to plan for additional labor resources to relieve work centers that are over capacity.

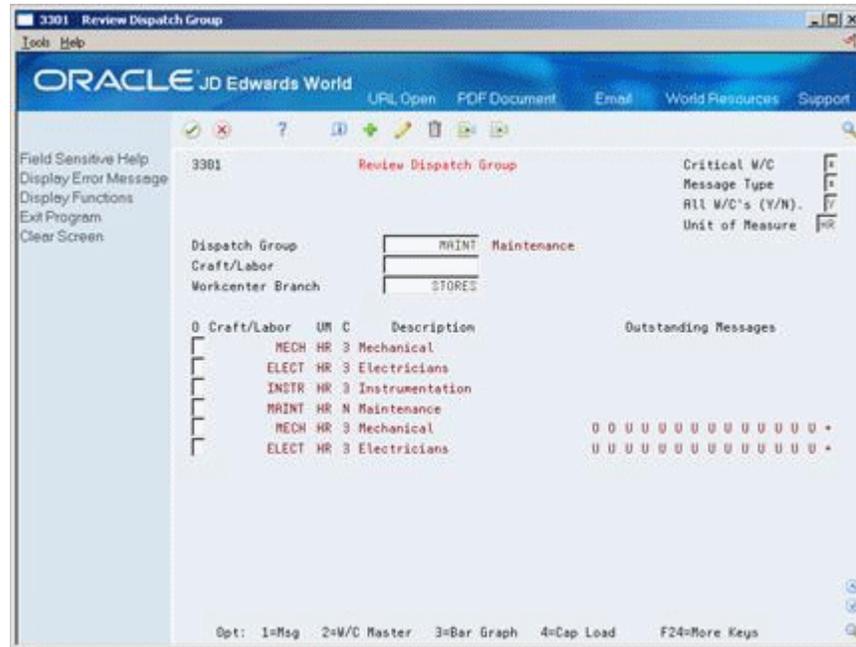
Reviewing labor messages consists of the following tasks:

- To review messages by dispatch group
- To review capacity messages by work center

To review messages by dispatch group

On Review Dispatch Group

Figure 33–1 Review Dispatch Group screen



1. Complete one of the following fields:
 - Dispatch Group
 - Craft/Labor
2. To limit your search to a specific type of work center or message, complete any of the following optional fields:
 - Critical Work Center
 - Message Type
 - All WC's (Work Centers) (Y/N)

Field	Explanation
Dispatch Group	<p>A super category code to group work centers within an overall business unit. For example, you can group like machines operating out of several work centers that report to one business unit under a dispatch group.</p> <p><i>Form-specific information</i></p> <p>You can enter a dispatch group to view all messages for all work centers in the group. To view messages, if any, generated for a specific work center, leave this field blank and enter the work center code in the Work Center field.</p>

Field	Explanation
Craft/Labor	<p>An alphanumeric field 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, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p> <p><i>Form-specific information</i></p> <p>Enter a work center code in this field to see detail messages only for that work center. To view detail messages for all work centers in a dispatch group, leave this field blank and enter a code in the Dispatch Group field.</p>
Critical W/C	<p>A code that identifies the work center as critical or not critical when the system calculates capacity. Valid values are:</p> <p>N – Not a critical work center</p> <p>1 – A critical work center in calculating resource requirement planning only</p> <p>2 – A critical work center in calculating capacity requirements planning only</p> <p>3 – A critical work center in calculating resource requirements planning and capacity requirements planning</p> <p>4 – Not a capacity work center (will not be generated in capacity planning)</p> <p>Note: The system displays Type 3 work centers whenever type 1 or type 2 is selected in this field.</p> <p><i>Form-specific information</i></p> <p>The field is display only and shows the specific work centers for which messages are generated. If you entered a code in the Craft/Labor field in the header area of the screen, the work centers listed in this field will be the same as the craft/labor field.</p>

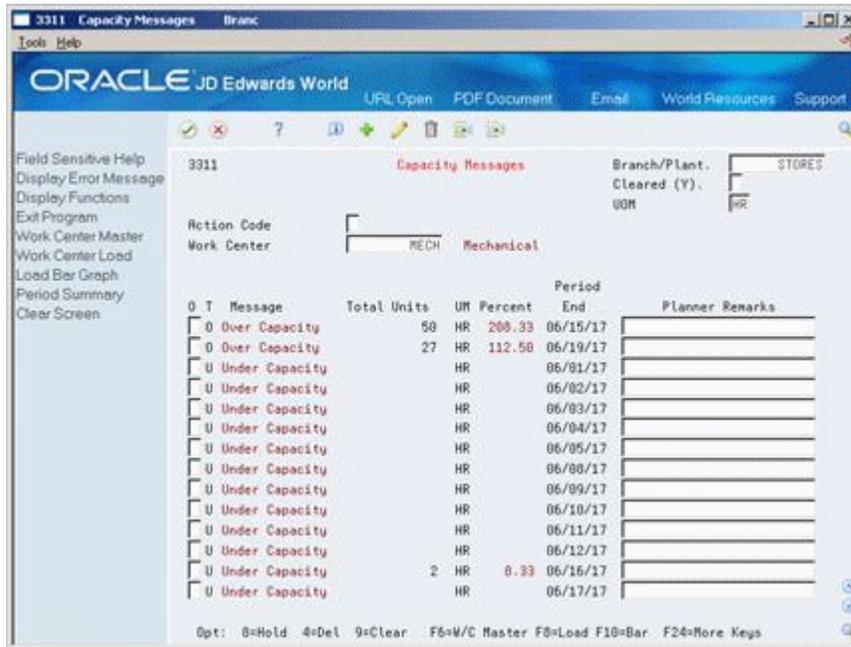
Field	Explanation
Message Type	<p>A code that distinguishes different messages generated in the Distribution Requirements Planning/Master Production Schedule/Material Requirements Planning system. Valid codes are:</p> <p>A – Warning messages (user controlled)</p> <p>B – Order and expedite</p> <p>C – Cancel</p> <p>D – Defer</p> <p>E – Expedite</p> <p>F – Frozen order (user controlled)</p> <p>G – Increase order quantity to (user controlled)</p> <p>H – Decrease rate quantity to</p> <p>I – Increase rate quantity to</p> <p>L – Decrease order quantity to (user controlled)</p> <p>M – Manual reminder</p> <p>N – Create rate</p> <p>O – Order</p> <p>P – Firm order</p> <p>S – FPO adjustment suggestion</p> <p>T – Past due order</p>
All W/C's (Y/N)	Enter Y to see all items or work centers or N to see only items or work centers with messages associated with them.

To review capacity messages by work center

On Review Dispatch Group

1. Complete the steps to review messages by dispatch group.
2. Choose Message for each work center for which you want to review capacity messages.

Figure 33–2 Capacity Messages screen



3. On Capacity Messages, complete the following field to limit the type of messages that display:
 - Cleared

Field	Explanation
Cleared (Y)	A code to indicate which messages should be displayed. A Y code will display all messages, including those that have been cleared or processed, but not those already deleted. Any value other than Y will display current messages only.

33.2.1 What You Should Know About

Topic	Discussion
Working with capacity messages	When you run the Labor Plan Generation program, the system deletes all messages except manual entries and held messages. Choose one of the following: Hold – Prevents the system from deleting a message Clear – Clears a message from the screen without deleting it Delete – Deletes a message

33.3 Reviewing Capacity Load

You can use capacity load information to help you allocate your labor resources as optimally as possible. You can compare the load created by your maintenance tasks with the labor resources available to perform the maintenance tasks.

Reviewing capacity load consists of the following tasks:

- Reviewing capacity load by work center

- Reviewing a bar graph of capacity load
- Reviewing capacity load by period summary

When you review detailed capacity load information by work center, you specify a work center and the unit of measure, such as hours, by which you track your maintenance tasks.

You can review capacity load information for a work center in a graphic format. This is particularly useful when you need a quick visual representation of over-capacity and under-capacity conditions by time period.

You can review all of the maintenance tasks that make up the capacity load on a work center. You can also specify the planning period you want to review. In addition, you can:

- Identify the percentage of the total load for the work center that each maintenance task accounts for
- Identify the resource units, such as hours, required for each maintenance task

33.3.1 Reviewing Capacity Load by Work Center

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Labor Planning

From Labor Planning (G1324), choose Capacity Load

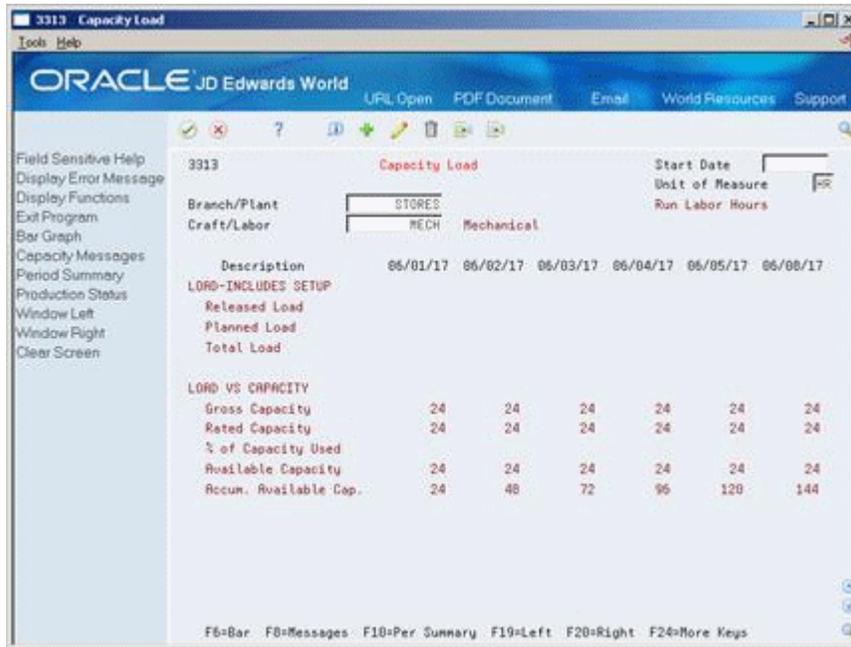
When you review detailed capacity load information by work center, you specify a work center and the unit of measure, such as hours, by which you track your maintenance tasks. Depending on how you set up your system, the system provides some or all of the following information by period.

- Released load - The load created from actual (firm) work orders.
- Planned load - The load created from forecasted (planned) work orders.
- Total load - The released load plus the planned load.
- Gross capacity - The units available from the work center.
- Rated capacity - The available units factored by efficiency and utilization. Efficiency is a user defined value that indicates how efficiently a work center operates. Utilization is a ratio of the actual time that a work center charges for maintenance activities to the planned time.
- Percent of capacity used - The total load divided by the rated capacity.
- Available capacity - The rated capacity minus the total load.
- Accumulated available capacity - A running total of available capacity.

To review capacity load by work center

On Capacity Load

Figure 33–3 Capacity Lead screen



1. Complete the following field:
 - Craft/Labor
2. Complete the following optional field:
 - Start Date
3. To move the calendar dates forward or backward to the period to review, choose Right or Left.

See Also:

- [Section 39.4.5, "Setting Up Resource Planning Codes"](#) for more information about defining the information that appears on Capacity Load

33.3.2 Processing Options

See [Section 56.8, "Load \(P3313\)"](#)

33.3.3 Reviewing a Bar Graph of Capacity Load

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

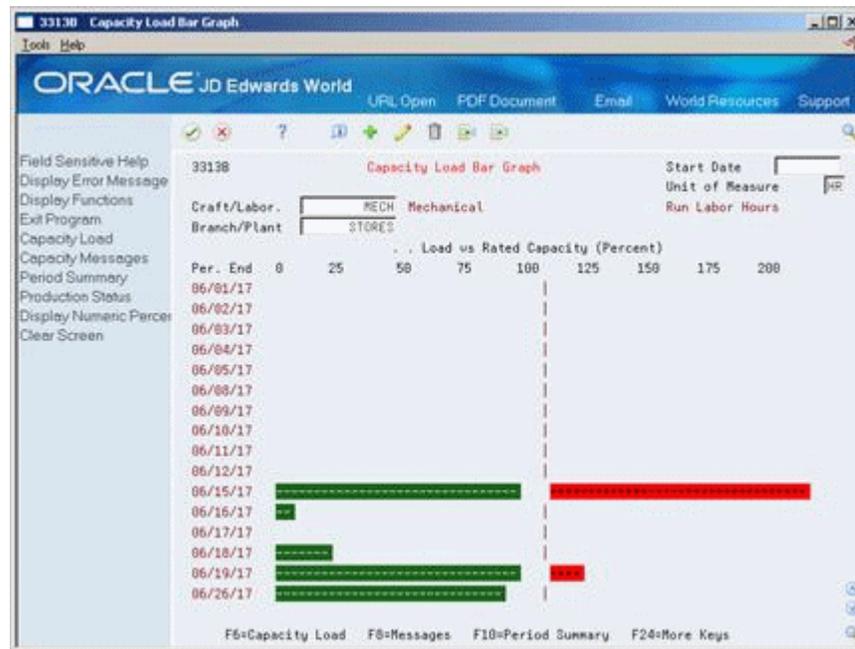
From Maintenance Planning (G1322), choose Labor Planning

From Labor Planning (G1324), choose Capacity Load Bar Graph

You can use Capacity Load Bar Graph to review capacity load information for a work center in a graphic format. This is particularly useful when you need a quick visual representation of over-capacity and under-capacity conditions by time period.

To review a bar graph of capacity load
On Capacity Load Bar Graph

Figure 33–4 Capacity Load Bar Graph screen



1. Complete the following fields:
 - Craft/Labor
 - Unit of Measure

The Unit of Measure field might already contain a default value
2. Complete the following optional field:
 - Start Date

33.3.4 What You Should Know About

Topic	Discussion
Color and monochrome monitors	If you are using a color monitor, the system uses contrasting colors to distinguish over-capacity conditions and under-capacity conditions. If you are using a monochrome monitor, over-capacity conditions appear in normal shading and under-capacity conditions appear in bold shading.

33.3.5 Processing Options

See [Section 56.9, "Load Bar Graph \(P3313B\)"](#).

33.3.6 Reviewing Capacity Load by Period Summary

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Labor Planning

From Labor Planning (G1324), choose Period Summary

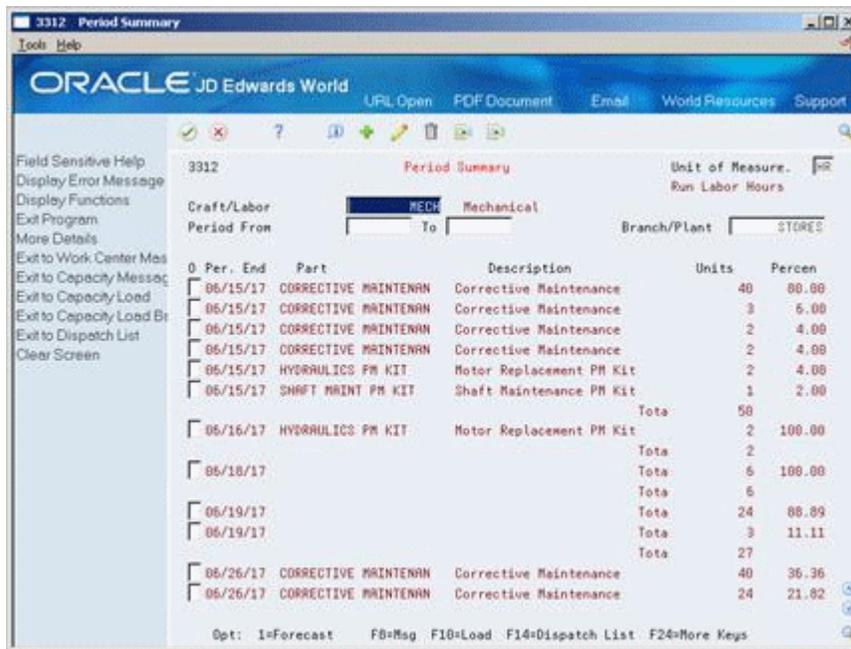
Use Period Summary to review all of the maintenance tasks that make up the capacity load on a work center. You can also specify the planning period that you want to review. In addition, you can:

- Identify the percentage of the total load for the work center that each maintenance task accounts for
- Identify the resource units, such as hours, required for each maintenance task

To review capacity load by period summary

On Period Summary

Figure 33–5 Period Summary screen



1. Complete the following field:
 - Craft/Labor
2. To limit the number of records that appear, complete the following fields:
 - Period From
 - Period To
3. To review work order number and type, choose More Details.

Figure 33–6 Period Summary screen

0	Per.	End	Part	Description	Units	Percent
<input type="checkbox"/>	06/15/17		CORRECTIVE MAINTENAN	Corrective Maintenance	40	80.00
	Order Number		3986	Order Type	FO	Firm Work Order W/Parts List
<input type="checkbox"/>	06/15/17		CORRECTIVE MAINTENAN	Corrective Maintenance	3	6.00
	Order Number		3085	Order Type	FO	Firm Work Order W/Parts List
<input type="checkbox"/>	06/15/17		CORRECTIVE MAINTENAN	Corrective Maintenance	2	4.00
	Order Number		3922	Order Type	FO	Firm Work Order W/Parts List
<input type="checkbox"/>	06/15/17		CORRECTIVE MAINTENAN	Corrective Maintenance	2	4.00
	Order Number		4159	Order Type	FO	Firm Work Order W/Parts List
<input type="checkbox"/>	06/15/17		HYDRAULICS PM KIT	Motor Replacement PM Kit	2	4.00
	Order Number		4343	Order Type	FO	Firm Work Order W/Parts List
<input type="checkbox"/>	06/15/17		SHAFT MAINT PM KIT	Shaft Maintenance PM Kit	1	2.00
	Order Number		4280	Order Type	FO	Firm Work Order W/Parts List
				Tota	50	
<input type="checkbox"/>	06/16/17		HYDRAULICS PM KIT	Motor Replacement PM Kit	2	100.00
	Order Number		4319	Order Type	FO	Firm Work Order W/Parts List

33.3.7 Processing Options

See [Section 56.10, "Period Summary \(P3312\)"](#)

33.4 Revising Labor Resources

After you have identified which work centers have over-capacity and under-capacity conditions, you should revise labor resources to correct the conditions and balance the workload. When you correct over-capacity and under-capacity conditions, you help maximize the efficiency of your maintenance organization and save costs.

You can use the following methods to revise labor resources:

- Change the date to perform the maintenance task
- Revise the labor resources allocated to a work center

For example, you have several work orders scheduled on a day that is 40 percent over capacity. You note that the following work day is 35 percent under capacity. You can balance your capacity load by rescheduling a portion of the work orders for the following day. You can also reschedule individual operation sequences (routing steps) on a work order.

You can also make short-term revisions to the work center that is responsible for the maintenance tasks. For example, you can:

- Indicate additional resources for a particular work day
- Add work days to a work week
- Revise the efficiency of the work center

Revising labor resources consists of the following tasks:

- Revising work order dates
- Revising resource units for a work center

33.4.1 Revising Work Order Dates

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Labor Planning

From Labor Planning (G1324), choose Capacity Load

You can revise work order dates to correct over-capacity and under-capacity conditions. You can also reschedule individual operation sequences (routing steps) on a work order.

To revise work order dates

On Capacity Load

Figure 33–7 Capacity Load screen

Description	06/01/17	06/02/17	06/03/17	06/04/17	06/05/17	06/08/17
LORD-INCLUDES SETUP						
Released Load						
Planned Load						
Total Load						
LORD VS CAPACITY						
Gross Capacity	24	24	24	24	24	24
Rated Capacity	24	24	24	24	24	24
% of Capacity Used						
Available Capacity	24	24	24	24	24	24
Recum. Available Cap.	24	48	72	96	120	144

1. Complete the following field:
 - Craft/Labor
2. Choose Production Status.

Figure 33–8 Production Status screen

Op	Start Date	Req Date	Qty Remaining	UM
347 WO	05/06/16	05/06/16	1	
698 WO	11/16/16	11/16/16	1	
1013 WO	01/19/17	01/19/17	1	
1336 WO	02/13/17	02/13/17	1	
2043 WO	03/17/17	03/17/17	1	
2843 WO	03/17/17	03/17/17	1	
3459 WO	03/25/17	03/25/17	1	ER
3483 WO	04/08/17	04/08/17	1	ER
3505 WO	04/17/17	04/17/17	1	ER
3514 WO	05/18/17	05/18/17	1	ER
3536 WO	06/01/17	06/01/17	1	ER
4927 WO	06/12/17	06/12/17	1	ER

3. On Production Status, complete the following field for each operation sequence on a work order that you want to reschedule:
 - Start Date
4. Complete the following optional field for each operation sequence on a work order that you want to reschedule:
 - Requested Date

33.4.2 Processing Options

See [Section 56.11, "Production Status \(P31226\)"](#)

33.4.3 Revising Resource Units for a Work Center

Navigation

From **Equipment/Plant Management (G13)**, choose **Maintenance Planning**

From **Maintenance Planning (G1322)**, choose **Labor Planning**

From **Labor Planning (G1324)**, choose **Craft Resource Units**

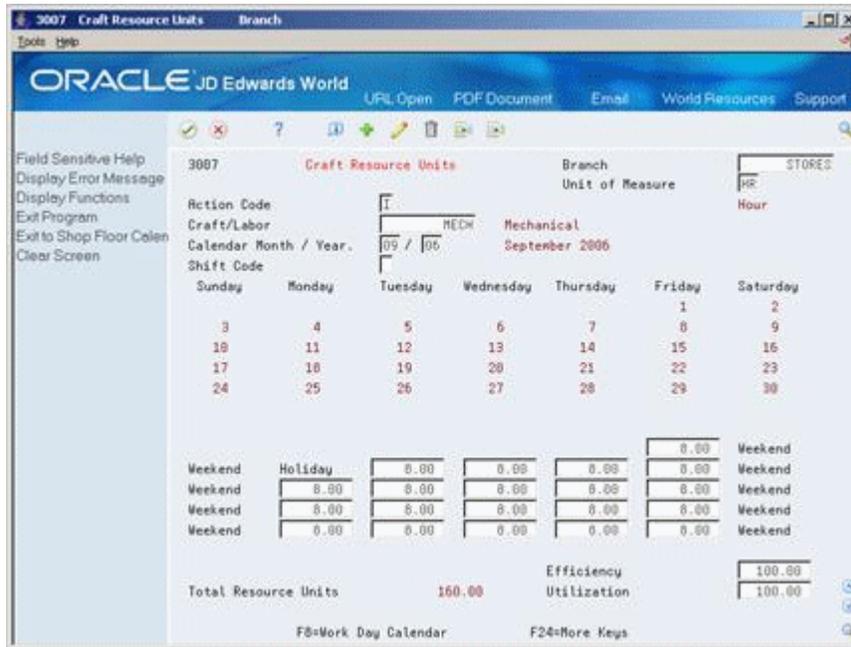
You can revise resource units for a work center to correct over-capacity and under-capacity conditions. Use Craft Resource Units to make short-term revisions to the work center responsible for the maintenance tasks. For example, you can:

- Indicate additional resources for a particular work day
- Add work days to a work week
- Revise the efficiency of the work center

To revise resource units for a work center

On Craft Resource Units

Figure 33–9 Craft Resource Units screen



1. Complete the following fields:

- Craft/Labor
- Calendar Month/Year
- Branch

The Branch field might already contain a default value.

2. Verify that the following field is blank:

- Shift

Shift codes are not applicable in Equipment/Plant Maintenance.

3. Complete the following field for each calendar day for which you want to revise resource units:

- Resource Unit

Each resource unit field corresponds to a calendar day.

4. To revise work center efficiency, complete the following field:

- Efficiency

Field	Explanation
Efficiency	<p>A user defined value that indicates how efficiently a work center operates. This value usually refers to people efficiency. When you enter a value in this field, and the Modify Cost by Work Center Efficiency field in the Job Shop Manufacturing Constants table (F3009) is set to Y, the system creates a new cost component (B4) from the cost calculated from the direct labor cost (B1). The system also uses this value to calculate rated capacity.</p> <p>Enter percents as whole numbers, for example, enter 80% as 80.00.</p>

33.4.4 What You Should Know About

Topic	Discussion
Revising work days on the workday calendar	<p>You can add or subtract work days to the workday calendar. For example, you might want to add a Saturday to the work week to compensate for an over-capacity condition. Choose Work Day Calendar to access the workday calendar. Enter a new type of day for each day you want to revise.</p> <p>See Section 39.2.3, "Setting Up the Workday Calendar."</p>
Adding long-term resources	<p>When you need to make permanent or long-term resource revisions to a work center, use Resource Revisions.</p> <p>See "Setting Up Work Centers" for more information about adding resources to a work center.</p>

33.4.5 Processing Options

See [Section 56.12, "Work Center Resource Units \(P3007\)"](#).

Part V

Setup

This part contains these chapters:

- [Chapter 34, "Overview to System Setup"](#)
- [Chapter 35, "Set Up Equipment"](#)
- [Chapter 36, "Set Up User Defined Codes"](#)
- [Chapter 37, "Set Up PM Schedule Information"](#)
- [Chapter 38, "Set Up Work Orders"](#)
- [Chapter 39, "Set Up Maintenance Planning"](#)

Overview to System Setup

This chapter contains these topics:

- [Section 34.1, "Objectives"](#)
- [Section 34.2, "About System Setup"](#)

34.1 Objectives

- To set up the information necessary to use the maintenance features within the Equipment/Plant Management system

34.2 About System Setup

Before you can use any of the maintenance features in Equipment/Plant Management, you must define certain information to customize the system for your specific business needs. This information consists of:

Information	Description
Equipment information	<p>You can set up equipment information to establish system basics, such as:</p> <ul style="list-style-type: none"> ■ Equipment and Fixed Asset constants ■ Next Numbers ■ Automatic accounting instructions (AAIs) that define the link between Equipment/Plant Maintenance and General Accounting systems
User defined codes	<p>Set up user defined codes to enter information to customize your system to your specific business needs. You can customize a wide variety of information using user defined codes.</p>
PM information	<p>You can set up PM information to:</p> <ul style="list-style-type: none"> ■ Define standard maintenance procedures ■ Create maintenance schedules ■ Define rules that govern when maintenance is performed

Information	Description
Work order information	<p>You set up work order information to provide the system with the information needed to process work orders according to your business needs. For example, you must:</p> <ul style="list-style-type: none">■ Identify the managers and supervisors who are responsible for maintenance tasks■ Determine the types of work order data that you want to track■ Determine the steps through which a work order must pass
Maintenance planning information	<p>You set up maintenance planning information to:</p> <ul style="list-style-type: none">■ Determine basic planning constants for each branch, such as the type of inventory commitment, the length of the work day, and so on■ Set up the work day calendar■ Determine the rules by which the system indicates a need for parts and labor resources

System setup consists of the following tasks:

- Setting up equipment
- Setting up user defined codes
- Setting up PM schedule information
- Setting up work orders
- Setting up maintenance planning

Set Up Equipment

This chapter contains these topics:

- [Section 35.1, "Setting Up Equipment"](#)
- [Section 35.2, "Setting Up Equipment Data"](#)
- [Section 35.3, "Setting Up Supplemental Data"](#)
- [Section 35.4, "Setting Up Shop Cost Inquiry"](#)

35.1 Setting Up Equipment

Before you can use Equipment/Plant Maintenance, you must establish certain information about your equipment, including equipment data, supplemental data, and shop cost inquiries.

35.2 Setting Up Equipment Data

You set up equipment data to establish basic information about your equipment. The system accesses the equipment data you set up when it executes various programs within Equipment/Plant Maintenance.

Setting up equipment data consists of the following tasks:

- Setting up equipment constants
- Setting up equipment/plant AAI's
- Setting up equipment next numbers
- Setting up depreciation account rules
- Setting up ledger depreciation rules
- Mapping equipment category codes

35.2.1 Setting Up Equipment Constants

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Equipment Constants

You set up equipment constants to control how your business uses Equipment/Plant Maintenance features. For example, when you define a default business unit for depreciation expense in equipment constants, the system automatically transfers this

information to Depreciation Information whenever you add a new piece of equipment to the system. You can also specify the business unit that appears as a default value for the asset accounts when you create equipment master information for a new piece of equipment.

You set up equipment constants only one time for Equipment/Plant Maintenance. Typically, you should not change the system constants. However, if you need to change them for any reason, you should understand the consequences. For example, if you change the default business unit for asset accounts, the change affects only the equipment that you add to the system after the change, and not the equipment that exists in the system prior to the change.

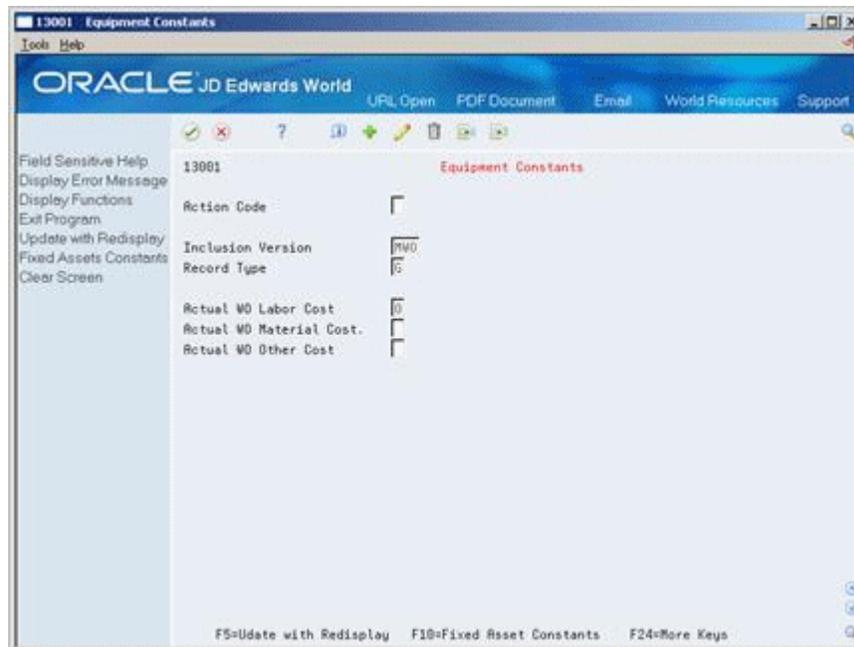
For some equipment constants, you must perform an additional process to update the system with your latest change. For example, if you change the symbol for the item number on the Equipment Constants screen, you must also run the Refresh Item Number program in Fixed Assets Global Updates to ensure that other programs that use symbols to identify the item number reflect the change.

Note: Equipment/Plant Maintenance shares system constants with the Fixed Asset system. You should work with the system administrator for Fixed Assets to ensure that the constants are set up to meet the needs of Fixed Assets and Equipment/Plant Maintenance.

To set up equipment constants

On Equipment Constants

Figure 35–1 *Equipment Constants screen*



1. To define supply and demand inclusion rules for material planning, complete the following field:
 - Inclusion Version
2. To define the work order record type for maintenance loops, complete the following field:

- Record Type
3. To specify whether entry of actual work order costs is allowed on Work Order Cost Summary, complete the following fields:
 - Actual Work Order Labor Cost
 - Actual Work Order Material Cost
 - Actual Work Order Other Cost
 4. Choose Update with Redisplay.
 5. Choose Fixed Assets Constants.

Figure 35–2 P & E Constants Revisions screen

Field Name	Current Value	Update
Action Code		<input type="checkbox"/>
Default Asset Cost BU: Y=Resp BU, N=Co No		<input type="checkbox"/> N
Default Depr Exp BU: Y=Resp BU, N=Deflt		<input type="checkbox"/> Y
Default Accum Dep BU: Y=Resp BU, N=Deflt		<input type="checkbox"/> N
Default Rev-Bill BU: Y=Resp BU, N=Deflt		<input type="checkbox"/> Y
Depreciation Cat. Cd	12	
Calculate Depr Utilizing Rules		<input type="checkbox"/>
Lock Accumulated Depr Account		<input type="checkbox"/>
Lock Depr Expense Account		<input type="checkbox"/>
Symbol to Identify Item Number		<input type="checkbox"/>
Symbol to Identify Unit Number		<input type="checkbox"/> E
Symbol to Identify Serial Number		<input type="checkbox"/> Y
Supplemental Cat. Cd	02	
Display all 10 report codes (Y/N)		<input type="checkbox"/> Y

6. On P & E Constants Revisions, complete the following fields to establish default values for business units:
 - Default Asset Cost Business Unit
 - Default Depreciation Expense Business Unit
 - Default Accumulated Depreciation Business Unit
 - Default Revenue-Billing Business Unit
7. To specify how the system calculates depreciation, complete the following field:
 - Calculate Depreciation Utilizing Rules
8. To specify whether the system allows changes to depreciation accounts after entries have been posted, complete the following fields:
 - Lock Accumulated Depreciation Account
 - Lock Depreciation Expense Account
9. To specify the number of category codes that appear on applicable entry screens, complete the following field:

- Display all 10 report codes (Y/N)
10. To specify how the system identifies equipment numbers, complete the following fields:
- Symbol to Identify Item Number
 - Symbol to Identify Unit Number
 - Symbol to Identify Serial Number
11. To specify which equipment category code the system uses to assign supplemental data types, complete the following field:
- Supplemental Category Code

Field	Explanation
Inclusion Version	<p>A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows:</p> <ul style="list-style-type: none"> ■ For Manufacturing - Allows multiple versions of resource rules for running MPS, MRP, or DRP. ■ For Advanced Warehouse Management - Allows multiple versions of inclusion rules for running put away and picking. The system processes only those order lines that match the inclusion rule for a specified branch/plant. <p><i>Form-specific information</i></p> <p>This code determines whether the system submits capacity planning interactively when you create a work order or when you change the status of a work order. The value you enter defines which version of the supply/demand inclusion rules the system uses to update the capacity plan.</p> <p>If you leave this field blank, the system does not update the capacity plan when you create a work order or change the status of a work order.</p>
Record Type	<p>The detail specification record type. Record types are user defined. You can set them up on the Detail Specification Types screen and use them to describe certain types of work order or engineering change order information.</p> <p><i>Form-specific information</i></p> <p>This is the work order record type that stores the associated equipment you define for maintenance routes. For example, if you enter record type E on this screen, when you set up a maintenance route, the system includes all equipment contained in record type E on the work order.</p>
Actual WO Labor Cost	<p>This code determines whether you can manually enter actual labor costs for a work order on the Work Order Cost Summary window. Valid values are:</p> <p>0 – The system calculates actual labor costs from Payroll.</p> <p>1 – Actual labor costs are manually entered and are not calculated by the system.</p>

Field	Explanation
Actual WO Material Cost	<p>This code determines whether you can manually enter actual material costs for a work order on the Work Order Cost Summary window. Valid values are:</p> <p>0 – The system calculates actual material costs from Inventory Issues.</p> <p>1 – Actual material costs are manually entered and are not calculated by the system.</p>
Actual WO Other Cost	<p>This code determines whether you can manually enter actual other costs for a work order on the Work Order Cost Summary window. Other costs are miscellaneous costs that are not associated with labor or materials, such as subcontracting costs. Valid values are:</p> <p>0 – The system calculates actual other costs from general ledger transactions.</p> <p>1 – Actual other costs are manually entered and are not calculated by the system.</p>
Default Asset Cst BU	<p>This code determines where the business unit for the asset cost account comes from when you add a new asset. When you add a new asset, the system uses the business unit that this value represents on Depreciation Information. Valid codes are:</p> <p>Y – Responsible Business Unit. The system uses the business unit from the responsible business unit on the Master Information screen.</p> <p>N – Company. The system uses the business unit from the company number on the Master Information screen.</p> <p>Typically the business unit and company share the same number. For example, business unit 50 usually contains general accounts for company 50.</p>
Default Depr Exp BU	<p>This code determines where the business unit for the depreciation expense comes from when you add a new asset. When you add an asset, the system uses the business unit that this value represents on Depreciation Information. Valid codes are:</p> <p>Y – Responsible business unit. The system uses the business unit from the responsible business unit on the Master Information screen.</p> <p>N – Default. The system uses the business unit from the Item Setup Default Coding screen.</p>
Default Accum Dep BU	<p>This code determines where the business unit for accumulated depreciation comes from when you add a new asset. When you add an asset, the system uses the business unit that this value represents on Depreciation Information. Valid codes are:</p> <p>Y – Responsible business unit. The system uses the business unit from the responsible business unit on the Master Information screen.</p> <p>N – Default. The system uses the business unit from the Item Setup Default Coding screen.</p>

Field	Explanation
Default Rev-Bill BU	<p>This code determines where the business unit for revenue and billing comes from when you add a new asset. When you add an asset, the system uses the business unit that this value represents on Depreciation Information. Valid codes are:</p> <p>Y – Responsible business unit. The system uses the business unit from the responsible business unit on the Master Information screen.</p> <p>N – Default. The system uses the business unit from the Item Setup Default Coding screen.</p>
Display all 10 report codes (Y/N)	<p>This code controls the number of category code fields the system displays on various screens. Examples of these fields might include Accounting Class, Equipment Class, and so on. Valid codes are:</p> <p>Y – Display first 10 category codes</p> <p>N – Display only the first five category codes</p> <p>Set the number of category codes that appear on your screens to accommodate the number of category codes you use in your system. You can change the value in this field at any time.</p>
Symbol to Identify Item Number	<p>You can assign one of three different numbers to an asset. These numbers are:</p> <ul style="list-style-type: none"> ■ Item Number-an eight-digit, computer assigned number ■ Serial Number-a twenty-five digit model or serial number ■ Unit Number-a twelve-digit, alphanumeric, user defined number <p>When you enter an asset number, you may use a prefix or symbol to designate the number you enter. If you use this number most often, you should leave the symbol blank so that you just need to enter the number. If it is not the number you use most often, you should define a symbol, such as / or *, that you will type before you enter the number so that the system knows which number you are representing.</p> <p>Note: You can leave only one asset number blank. The other two must have a symbol so that all three numbers are unique. Verify that the symbols you use are not significant for any other purposes of data entry, for example, a period or comma.</p>
Symbol to Identify Unit Number	<p>You can assign one of three different numbers to an asset. These numbers are:</p> <ul style="list-style-type: none"> ■ Item Number-An eight-digit, computer assigned number ■ Serial Number-A twenty-five-digit model or serial number ■ Unit Number-A twelve-digit, alphanumeric, user defined number <p>When you enter an asset number, you may use a prefix or symbol to designate the number you enter. If you use this number most often, you should leave the symbol blank so that you just need to enter the number. If it is not the number you use most often, you should define a symbol, such as / or *, that you will type before you enter the number so that the system knows which number you are representing.</p> <p>Note: You can leave only one asset number blank. The other two must have a symbol so that all three numbers are unique. Be sure that this symbol is not significant for any other purposes of entry, for example, a period or comma.</p>

Field	Explanation
Symbol to Identify Serial Number	<p>You can assign one of three different numbers to an asset. These numbers are:</p> <ul style="list-style-type: none"> Item Number - Eight-digit, computer assigned number Serial Number - Twenty-five-digit model or serial number Unit Number - Twelve-digit, alphanumeric, user-defined number <p>When you enter an asset number, you may use a prefix or symbol to designate the number you enter. If you use this number most often, you should leave the symbol blank so that you just need to enter the number. If it is not the number you use most often, you should define a symbol, such as ' or *, that you will type before you enter the number so that the system knows which number you are representing.</p> <p>Note: You can leave only one asset number blank. The other two must have a symbol so that all three numbers are unique. Be sure that this symbol is not significant for any other purposes of entry, for example, a period or comma.</p>
Supplemental Cat. Cd	<p>Enter the number of the equipment category code that controls which supplemental data types the system displays on the Equipment Management supplemental data screens.</p> <p>When you set up supplemental data, you use Data Type Cross Reference to specify which types of data appear on supplemental data screens. For example, on Equipment Constants, you can specify equipment category code 2 (Major Equipment Class) as the supplemental data category code. Then, on Data Type Cross Reference, you can specify which data types are appropriate for each class of equipment you set up under Major Equipment Class, such as specification sheets and transportation notes for heavy equipment.</p>

35.2.2 What You Should Know About

Topic	Discussion
Equipment data	<p>You should set up the following types of equipment data:</p> <ul style="list-style-type: none"> Equipment constants Automatic accounting instructions (AAIs) Next numbers Depreciation account rules Ledger depreciation rules Category code default values
Supplemental data	<p>You should complete the following setup procedures for supplemental data:</p> <ul style="list-style-type: none"> Set up supplemental data types Set up specification data types Assign supplemental data types to classes of equipment Set up security to limit user access to supplemental data

Topic	Discussion
Shop cost inquiry	<p>You should set up the format of the shop cost inquiry screen to meet your business needs. You can define the following:</p> <ul style="list-style-type: none"> ■ Inquiry columns ■ Inquiry formats ■ Inquiry paths

35.2.3 Setting Up Equipment/Plant AAI

Navigation

From **Equipment/Plant Management (G13)**, enter **29**

From **Equipment/Plant Management Setup (G1341)**, choose **Automatic Accounting Instructions**

Many JD Edwards World programs need information about your account structure and specific account values to process business transactions properly. You define your account structure and specific account values by using automatic accounting instructions (AAIs). The system stores the AAI values that you define for your company in the Automatic Accounting Instructions table (F0012). Whenever a program performs an accounting function, it accesses the Automatic Accounting Instructions table.

Equipment/Plant AAI define the rules by which Equipment/Plant Maintenance and the General Accounting system interact. When you define AAIs, you establish how the system processes transactions for various programs. For example, AAIs set the rules by which general ledger transactions can post to Equipment/Plant Maintenance.

You set up AAIs by company, based on account numbers, and in some cases, ranges of account numbers. The system includes predefined ranges. You must specify the business unit and object account for the AAIs as necessary. Additionally, you must specify subsidiary accounts for certain AAIs.

The system uses single AAI values to find individual accounts and AAI ranges to find account ranges. When you set up AAI ranges, you must observe the following guidelines:

- You can set up a maximum of 49 account ranges for a single company.
- The maximum number of account ranges that you can set up for all your companies combined is 200.
- Do not skip AAI ranges. For example, do not set up FX range 01 - 02 and FX05 - 06, leaving FX03 - 04 blank for later use. If the system searches the AAIs for an account and finds a gap in a range, the search is stopped.
- You must set up your AAI ranges in numerical order. However, you are not required to set up your object accounts in numerical order.

AAIs for Equipment/Plant Maintenance include the following categories:

Category	Description
Equipment AAIs	<p>You must set up the following equipment AAIs.</p> <ul style="list-style-type: none"> ■ FX: Identifies accounts that post to equipment ■ FC: Identifies asset cost accounts ■ AT: Identifies accounts and descriptive text that define totals for summary reporting
PM AAIs	<p>You must set up the following PM AAIs.</p> <ul style="list-style-type: none"> ■ AT00: Identifies the statistical account for units, such as hours ■ FMA: Identifies the statistical account for units, such as fuel ■ FMB: Identifies the statistical account for units, such as miles ■ FMC: Identifies the statistical account for the original meter reading that corresponds to the FMA statistical account ■ FMD: Identifies the statistical account for the original meter reading that corresponds to the FMB statistical account ■ FME: Identifies the statistical account for the original meter reading that corresponds to the AT00 statistical account
Work order AAIs	<p>You must set up the FP AAI. This AAI identifies the account that the system charges when you create a purchase order for parts on the work order parts list.</p>

See Also:

- Working with AAIs in the *JD Edwards World General Accounting I Guide* for more information about adding or changing AAIs

The guidelines that follow pertain only to AAIs relevant to Equipment/Plant Maintenance.

FX Range

The system uses the FX range in the AAIs to determine which journal entries in the general ledger can post to equipment. You must specify all equipment accounts within the FX range of accounts. For example:

- FX01 - FX02. Beginning and ending range for asset cost accounts
- FX03 - FX04. Beginning and ending range for accumulated depreciation accounts
- FX05 - FX06. Beginning and ending range for depreciation expense accounts

When you set up the FX range of AAIs, you must apply the following rules:

- Define up to 49 FX ranges, starting with FX01 - FX02 and ending with FX97 - FX98.
- Ending ranges must be even numbers, such as FX02 and FX98.
- FX ranges can be company specific, or you can use the default company 00000 to set up the FX range for all your companies at the same time. If you set up a company-specific FX range for one company, you must set up the FX ranges for all companies. In addition, you must begin the FX range for each company with FX01.

- Specify an object account for each FX range.
- Subsidiary accounts are optional. To include all subsidiaries in the FX range, include .99999999 in the ending range. For example, if you use subsidiary accounts, you might have a range of accounts that includes accounts 3000 - 4000.99999999. If you add other subsidiaries to your chart of accounts at a later time, you do not have to change your AAIs.

FC Range

The system uses the FC range in the AAIs to determine which accounts are reserved for asset cost accounts.

When you set up the FC range of AAIs, you must apply the following rules:

- Define up to 49 FC ranges.
- Define account ranges for all asset cost accounts.
- Set up FC account ranges for company 00000 only. The FC range is not company specific.

AT Range

The system uses the AT range of AAIs to determine which general ledger accounts are included in the summary lines on the Cost Summary screen. Use AT01 - AT99 to specify these interim total accounts and wording that appear for each total on Cost Summary. Use AT00 to define the account in which to store statistical information for hours. The AT range of AAIs is optional.

For example, you might specify that your balance sheet accounts are in account range 1000 - 3999 and your income and expense accounts are in the 4000 - 8999 range. You could set up your AT range as follows:

- AT01. Object account 4000. This interim total sums all object accounts below 4000, or accounts 0 - 3999. The system does not include object account 4000.
- AT02. Object account 9000. This interim total sums all object accounts between 4000 - 8999. The system does not include object account 9000.

When you set up the AT range of AAIs, you must apply the following rules:

- Define interim totals between AT01 - AT99.
- Use AT00 to define the account number that stores statistical information for hours.
- Do not specify an interim total for the Cost Summary grand total. The system automatically creates a grand total on Cost Summary.

FMA, FMB, and AT00 AAIs

The system uses these AAIs to determine the statistical accounts to use when equipment accumulates units, such as miles, hours, and fuel. The system uses statistical units to track equipment use. Programs that use these AAIs include:

- Meter Readings
- Item PM Schedule
- Update PM Schedule
- PM History and Completion
- Equipment Cost Analysis

When you set up FMA, FMB, and AT00 AAIs, you can set them up to be company-specific. In addition, you must apply the following rules:

- Include a business unit and object account for each AAI
- Do not include a subsidiary account

If you perform preventive maintenance based on equipment use measured by billed hours, you can use the same accounts for these AAIs as you use for billing accounts. AAIs applicable to equipment billing include:

- FTC
- FTC1 - FTC0
- FTxx

See Also:

- [Setting Up Automatic Accounting Instructions in the *JD Edwards World Equipment Billing Guide*](#)

FMC, FMD, and FME AAIs

The system uses these AAIs to define the statistical account that records the original meter reading determined by the Meter Readings program. Each of these AAIs corresponds to a statistical account as follows:

- FMC corresponds to the FMA account
- FMD corresponds to the FMB account
- FME corresponds to the AT00 account

When you set up FMC, FMD, and FME AAIs, you can set them up to be company-specific. Additionally, you must apply the following rules:

- Include a business unit and object account for each AAI
- Do not include a subsidiary account

FP AAI

The system uses the FP AAI to determine which account to charge when you create a purchase order from the work order parts list. You can set up the FP AAI to be company-specific. Additionally, you must apply the following rules:

- Include an object account for each AAI.
- Optionally include a business unit or subsidiary account. If you do not include a business unit or subsidiary account, the system uses the Charge to Business Unit and Repair Code from the work order for which you are purchasing parts.

Additionally, you must verify that line types have been set up in the system.

See Also:

- [Appendix A, "Inventory Concepts and Setup"](#) for more information about setting up line types

Example: AAI Screen

The Automatic Accounting Instructions screen shows an index, or list, of the AAIs used in the JD Edwards World systems. Select Automatic Accounting Instructions from the Equipment/Plant Management setup menu (G1341) to view the AAIs for Equipment/Plant Maintenance.

You can use the roll keys or the page up and page down keys to move through the screens and view all the AAIs. Or, you can skip to a specific AAI by entering its sequence number in the Skip to Sequence Number field.

You can access other AAI entry screens to make either single or multiple AAI revisions. Use Single AAI Revisions to revise any AAI for a particular company. Use Multiple AAI Revisions to revise or add more than one AAI for a company or specific AAIs for multiple companies.

35.2.4 What You Should Know About

Topic	Discussion
Entering an item number	The item number identifies the AAI and does not refer to an equipment item number.
Entering a description	You can change the description for the AAI account use to fit your needs. This field is for your information only and does not affect how individual programs use the AAI.

35.2.5 Processing Options

See [Section 57.1, "AAIs - Fixed Assets \(P00121\)"](#)

35.2.6 Setting Up Equipment Next Numbers

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Next Numbers

When you set up equipment next numbers, you enable the system to automatically assign unique numbers for certain items. For example, when you create an equipment master for a new piece of equipment, the system assigns a unique item number to the equipment. You must set up next numbers for the following items:

Item	Description
Item number	<p>The system generates an item number to uniquely identify each piece of equipment. Depending on how you set up equipment constants, you can use the item number as the primary equipment number.</p> <p>See Section 35.2.1, "Setting Up Equipment Constants" for more information about equipment numbers.</p>
Document number	<p>The system assigns unique document numbers to identify documents that it creates when you run various Fixed Assets programs, including:</p> <ul style="list-style-type: none">■ Compute Depreciation■ Single/Mass Asset Transfer■ Single/Mass Asset Disposal■ Enter Beginning Balances■ Asset Splits

Item	Description
Text key number	The system generates a text key number to uniquely identify each location and to associate location tracking text to the location. The system assigns every location a text number, whether you enter text for the location.
Transfer number	The system generates a transfer number to group location transfers. The transfer number can include multiple location information lines for multiple pieces of equipment. For example, when you enter location tracking information for several pieces of equipment on one screen, the system generates a transfer number to group each line of information as one transfer order.

The system stores these next numbers in the Fixed Assets system (system 12). The system generates next numbers from the Next Numbers table (F0002).

Caution: JD Edwards World strongly recommends that you do not use blank as a next number value.

To set up equipment next numbers

On Next Numbers

Figure 35–3 Next Numbers screen

Use	Next Number	Check Digit
Item Number	3425	Y
F/A Doc No.	675	N
Text Key	1795	N
Transfer No.	273	N

CAUTION:
Changing the data on this screen may make it impossible to retrieve previously added addresses and may result in attempts to assign duplicate numbers.

F8=Next Numbers by Co/FY F24=More Keys

- To locate next numbers for a particular system, complete the following field:
 - System Code
- Complete the following fields for each number that you need to set up:
 - Next Number
 - Check Digit

Field	Explanation
Next Number	The next number which will automatically be assigned by the system. Next numbers can be used for many types of documents including voucher numbers, invoice numbers, journal entry numbers, employee numbers, address numbers, and so on. Next numbers can be reviewed from the Operations Control Menu. You must adhere to the next numbers that have been pre-established unless custom programming has been provided.
Check Digit	A number that prevents the Next Numbers program (P0002) from assigning transposed numbers. If you use check digits, the system automatically adds a number to the end of each number that it assigns through Next Numbers.

35.2.7 What You Should Know About

Topic	Discussion
Changing next numbers	JD Edwards World recommends that you set up next numbers only once. To ensure data integrity and to prevent the system from assigning duplicate next numbers, you must never change a next number to a lesser value.
Deleting next numbers	Do not delete next number values. Deleting a next number value might prevent the system from assigning an automatic next number or cause other unpredictable results.
Using check digits	JD Edwards World recommends that you use a check digit with item numbers to help prevent the possibility of transposition errors. A check digit is a digit that the system assigns at random to a next number.

35.2.8 Setting Up Depreciation Account Rules

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Depreciation Account Rules

Before you create equipment masters, you must set up depreciation account rules. Depreciation account rules define links between asset cost accounts and depreciation accounts. Depreciation account rules simplify the creation of equipment masters by defining how the system classifies equipment. In addition, the system posts depreciation amounts to the accounts that you specify in the depreciation account rules.

You can set up date-sensitive depreciation account rules. For example, if depreciation for a particular class of assets, such as heavy equipment, must be posted to different accounts after January 1, you can set up a rule with an effective date of January 1. As of January 1, the system posts depreciation for heavy equipment to the accounts that you specify in the date-specific rule.

The values that you set up on Company Depreciation Account Rules are also used by the Fixed Assets system. JD Edwards World recommends that you coordinate with your accounting department when you set up or change depreciation account rules.

You must set up depreciation account rules for every combination of company and asset cost account. Ensure that you set up depreciation account rules for any new cost

accounts or companies that you add to your system at a later time. If you make any changes to depreciation account rules, you should verify that the values are correct before you create new equipment masters.

To set up depreciation account rules

On Company Depreciation Account Rules

Figure 35–4 Depreciation Account Rules screen

The screenshot shows the 'Depreciation Account Rules' screen in Oracle JD Edwards World. The window title is '12002 Depreciation Account Rules'. The screen displays a form with the following fields:

- Action Code: []
- Company Number: 50
- Asset Cost Obj/Subsidiary: 2095
- Effective From / Through: 01/01/2017 / 12/31/2118
- Depreciation Will Post To:

G/L Account	Bus. Unit	Obj.	Sub
Accum Depr			
Depr Expense			
Depr Subl Derived			
- Automatic Asset Creation Will Default To:

Major Accounting Class	Depreciation Cat. Cd
95	
- Revenue Credit:

G/L Account	Bus. Unit	Obj.	Sub
Revenue Credit			

At the bottom of the screen, there are function keys: F13=Account Master, F21=Print, and F24=More Keys.

- Complete the following fields:
 - Company Number
 - Asset Cost Object
- Complete the following optional fields:
 - Asset Cost Subsidiary
 - Effective From Date
 - Major Accounting Class
 - Major Equipment Class
- To specify an accumulated depreciation account, complete the following fields:
 - Accumulated Depreciation Business Unit
 - Accumulated Depreciation Object
 - Accumulated Depreciation Subsidiary
- To specify a depreciation expense account, complete the following fields:
 - Depreciation Expense Business Unit
 - Depreciation Expense Object
 - Depreciation Expense Subsidiary
- To specify a default account for revenue credit, complete the following fields:

- Revenue Default Credit Business Unit
- Revenue Default Credit Object
- Revenue Default Credit Subsidiary

Field	Explanation
Company Number	<p>A code that identifies a specific organization, fund, entity, and so on. This code must already exist in the Company Constants table (F0010). It must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p> <p>Note: You can use company 00000 for default values, such as dates and automatic accounting instructions (AAIs). You cannot use it for transaction entries.</p>
Asset Cost Object	<p>The general ledger account (object number) used to record a fixed asset's acquisition cost. Within each company, you define default coding instructions for asset cost accounts. Then, based on these default codes, when you set up a new asset, the system automatically assigns the following:</p> <ul style="list-style-type: none"> ■ Major and subclass codes ■ G/L accounts for depreciation and revenue ■ Depreciation books
Major Accounting Class	<p>A user defined code (12/C1) that determines the accounting class category code. You use this accounting category code to classify assets into groups or families, for example, 100 for land, 200 for vehicles, and 300 for general office equipment.</p> <p>JD Edwards World recommends that you set up major class codes that correspond to the major general ledger object accounts in order to facilitate the reconciliation to the general ledger.</p> <p>Note: If you do not want to use the major accounting class code, you must set up a value for blank in the user defined code table.</p>
Major Equipment Class	<p>A user defined code (12/C2) that is used to classify assets into groups or families. You use the equipment category code as a subclass to further define the accounting class, for example, 310 for copy equipment, 320 for projectors, and 330 for typewriters within the accounting class for general office equipment.</p> <p>Note: If you do not want to use the major equipment class, you must set up a value for blank in the user defined code table.</p>

35.2.9 What You Should Know About

Topic	Discussion
Depreciation calculation	Depreciation calculation is based on the rule in effect at the end of the year. If a rule is added or changed during the year, you must run the asset transfer program to bring existing balances into alignment with the new rule.
Revising depreciation account values	Any revisions that you make to the depreciation account values for an asset cost account or company affect only the new equipment that you add to the system after making the changes. The revisions do not affect existing equipment.

Topic	Discussion
Date sensitivity	When you enter a value in the Effective From field, the system applies the depreciation account rule from that date until you enter an identical depreciation account rule, but with a different beginning date. The Effective Through date of the original rule then becomes the day before the Effective From date of the new rule.
Company numbers	The company number that you associate with the asset cost and accumulated depreciation accounts must be the same as the company number that you assign to the piece of equipment.
Major Accounting Class	JD Edwards World recommends that you establish a one-to-one relationship between the asset cost account and the Major Accounting Class code (12/C1). If you establish this one-to-one relationship, you will not need to override the default values when you create new equipment masters.

35.2.10 Setting Up Ledger Depreciation Rules

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Ledger Depreciation Rules

Before you can create equipment masters, you must set up ledger depreciation rules. When you set up ledger depreciation rules, you define the depreciation methods that the system uses to calculate depreciation for specific ledger types. As a minimum, you must set up a depreciation rule for the AA (Actual Amounts) ledger type for each company and asset cost account combination that you have in the system. You can set up as many ledger depreciation rules as you need, based on any combination of the following:

- Company
- Accounting category
- Depreciation category
- Asset cost account
- Effective From

The values that you set up on Company Ledger Depreciation Rules are also used by the Fixed Assets system. JD Edwards World recommends that you coordinate with your accounting department when you set up or change ledger depreciation rules.

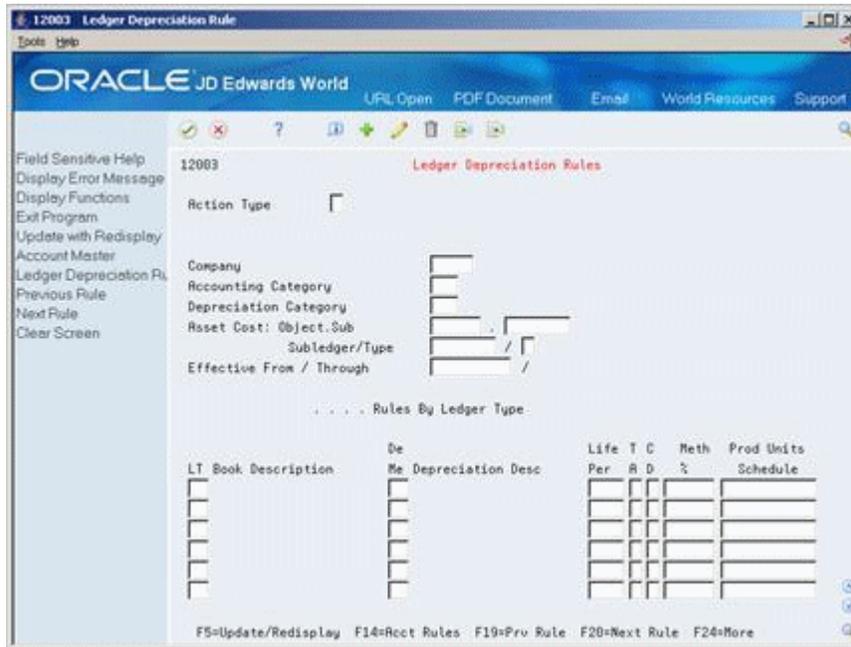
See Also:

- Understanding Depreciation Methods and Setting Up User Defined Depreciation in the *JD Edwards World Fixed Assets Guide* for more information about valid field combinations that you can apply to ledger depreciation rules

To set up ledger depreciation rules

On Company Ledger Depreciation Rules

Figure 35–5 Ledger Depreciation Rules screen



1. For each ledger depreciation rule that you want to set up, complete at least one of the following fields:
 - Company
 - Accounting Category
 - Depreciation Category
 - Asset Cost Object
2. Complete any of the following optional fields:
 - Asset Cost Subsidiary
 - Asset Cost Subledger
 - Subledger Type
 - Effective From Date
3. For each ledger depreciation rule that you want to set up, complete a valid combination of the following fields:
 - Ledger Type
 - Depreciation Method
 - Life Periods
 - Investment Term Apportionment Code (TA)
 - Compute Direction
 - Method Percent
 - Production Units Schedule

Field	Explanation
Company	<p>A code that identifies a specific organization, fund, entity, and so on. This code must already exist in the Company Constants table (F0010). It must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p> <p>Note: You can use company 00000 for default values, such as dates and automatic accounting instructions (AAIs). You cannot use it for transaction entries.</p>
Accounting Category	<p>A user defined code (12/C1) that determines the accounting class category code. You use this accounting category code to classify assets into groups or families, for example, 100 for land, 200 for vehicles, and 300 for general office equipment.</p> <p>JD Edwards World recommends that you set up major class codes that correspond to the major general ledger object accounts in order to facilitate the reconciliation to the general ledger.</p> <p>Note: If you do not want to use the major accounting class code, you must set up a value for blank in the user defined code table.</p>
Depreciation Category	<p>The depreciation category an asset belongs to. The value is derived from the User Defined Code specified as the "Depreciation Category Code", DPCC, in the Fixed Assets constants. Generally, a depreciation category will be used to group assets with identical depreciation characteristics for depreciation calculation and reporting purposes.</p>
LT	<p>A user defined code (system 09/type LT) that specifies the type of ledger, such as AA (Actual Amount), BA (Budget Amount), or AU (Actual Units). You can set up multiple, concurrent accounting ledgers within the general ledger to establish an audit trail for all transactions.</p>

Field	Explanation
Me	<p>The user defined code (system 12, type DM) that indicates the method of depreciation for the specified book. In addition to any user defined depreciation methods you set up for your company, the following standard depreciation methods are available in the Fixed Assets system:</p> <ul style="list-style-type: none"> 00 – No depreciation method used 01 – Straight Line Depreciation 02 – Sum of the Year's Digits 03 – 125% Declining Balance to Cross-Over 04 – 150% Declining Balance to Cross-Over 05 – Double Declining Balance to Cross-Over 06 – Fixed % on Declining Balance 07 – ACRS Standard Depreciation 08 – ACRS Optional Depreciation 09 – Units of Production Depreciation 10 – MACRS Luxury Cars - Domestic 11 – Fixed % Luxury Cars - Foreign 12 – MACRS Standard Depreciation 13 – ACRS Alternative Depreciation 14 – ACRS Alternate Real Property 15 – Fixed % of Cost 16 – Fixed % on Declining Balance to Cross-Over 17 – AMT Luxury Auto 18 – ACE Luxury Auto <p>Note: Any additional depreciation methods you create for your organization must have an alpha code.</p>
Life Per	<p>The life of an asset in months or periods. The system uses months or periods only to express the life of an asset. For example, if your company uses a 12-month calendar, then a five-year ACRS asset has a 60-month life. If your company uses a 13-month calendar, then a five-year ACRS asset has a 65-month life, and so on. You must specify a life month value for all user defined depreciation methods, and for all standard depreciation methods, except the standard methods 00, 06, 09, 11, and 15.</p>

Field	Explanation
T A	<p>A code for additional depreciation information. This code is used for Investment Tax Credit (ITC) and averaging conventions. The system validates the code you enter in this field against user defined code table 12/AC. Valid codes are:</p> <p>0 – No ITC Taken</p> <p>1 – Three Year Method (3 1/3%)</p> <p>2 – Five Year Method (6 2/3%)</p> <p>3 – Seven Year Method (10%)</p> <p>4 – ACRS Method with Basis Reduction (10% ITC)</p> <p>5 – ACRS Method without Basis Reduction (2% ITC or No ITC)</p> <p>A – Actual Date of Depreciation Start Period</p> <p>M – Mid-Month Convention</p> <p>Q – Mid-Quarter Convention</p> <p>Y – Mid-Year Convention</p> <p>P – Middle of Period</p> <p>F – First-half/Second-half</p> <p>W – Whole Year</p> <p>N – First Day of Next Period</p> <p>R – First Day of Next Year</p> <p>S – Actual Start Date for Primary Rule/First Day of Period for Secondary Rule</p> <p>Note: Numeric codes apply to standard depreciation methods only.</p> <p>To determine the date for F (First-half/Second-half), use the following guidelines:</p> <ul style="list-style-type: none"> ■ If the asset was placed in service in the first half of the year then the adjusted depreciation start date is the first day of the year. ■ If the asset was placed in service in the second half of the year then the adjusted depreciation start date is the first day of the succeeding year. ■ The first half of the year expires at the close of the last day of the calendar month which is closest to the middle of the tax year. ■ The second half of the year begins the day after the expiration of the first half of the tax year.

Field	Explanation
C D	<p>A code that indicates the method of computation that the system uses to calculate depreciation based on the depreciation method you specify.</p> <p>Valid codes are:</p> <p>C – Current year to date. Calculates only the current year's depreciation.</p> <p>I – Inception to date. Recalculates the entire depreciation amount from the start date through the current year. Prior-year depreciation is then subtracted to determine current year depreciation. This method results in a one-time current period correction for any errors in prior period depreciation.</p> <p>F – Inception to date. Calculates inception to date for the first rule (if there are two rules) and uses a C for the second rule.</p> <p>P – Current period. Calculates depreciation for the current period and then extrapolates the annual amount based on the cumulative percent from the period pattern and year-to-date posting. Any depreciation calculated for the current period is subtracted.</p> <p>R – Remaining months. Depreciates the net book value as of the beginning of the current tax year over the remaining life of the asset. This results in the amortization of prior period calculation errors over the remaining life of the asset.</p>
Meth	<p>Enter the percentage you want the system to use when calculating depreciation. Use whole numbers. For example, enter 10 for 10%. The system uses a percentage when computing the following methods of depreciation:</p> <p>06 – Fixed % on Declining Balance. (This method of depreciation is commonly used by Canadian and utility companies.)</p> <p>11 – Fixed % Luxury Car - Foreign.</p> <p>15 – Fixed % of Cost.</p> <p>16 – Fixed % on Declining Balance to Cross-Over.</p> <p>The system also uses this field to compute any user defined depreciation method in which you specify a percentage.</p>
Prod Units Schedule	<p>The alphanumeric code you assign to a units of production schedule. You must set up the schedules you want to use for method 09 (Units of Production Depreciation) in advance on the Units of Production Schedule screen.</p>

35.2.11 What You Should Know About

Topic	Discussion
Non-depreciating equipment	You must set up the AA ledger type as a minimum for all of your equipment. Use depreciation method 00 with the AA ledger type for non-depreciating equipment.

35.2.12 Mapping Equipment Category Codes

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Category Code Mapping

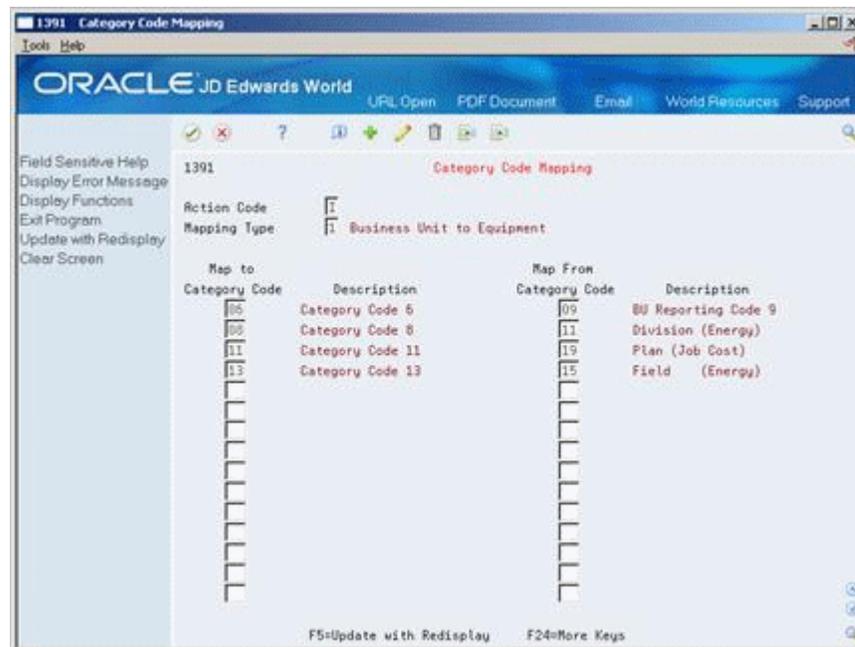
If you set up category codes for your business unit that would also be helpful for tracking and reporting on your equipment, you can set up default values to map, or tie specific business unit category codes to specific equipment category codes. You can also map specific equipment category codes to specific work order category codes.

When you set up an equipment master for a new piece of equipment, the system automatically enters the category codes that you specified from the responsible business unit on Equipment Master. Similarly, when you set up work orders for equipment, the system automatically enters the category codes that you specified from the equipment master on the work order.

To map equipment category codes

On Category Code Mapping

Figure 35–6 Category Code Mapping screen



1. To indicate how you want to map the category codes, complete the following field:
 - Mapping Type
2. Complete the following fields:
 - Map to Category Code
 - Map From Category Code

Field	Explanation
Mapping Type	Enter a 1 in this field to map Business Unit Category Codes to Equipment Category Codes. Enter a 2 in this field to map Equipment Category Codes to Work Order Category Codes.

Field	Explanation
Map to Category Code	Use this field to specify defaults for your category codes. If the mapping type is 1, the equipment category code number in this field receives its default value from the Business Unit category code you specify in the Map From Category Code field on this screen. If the mapping type is 2, the Work Order category code in this field receives its default value from the Equipment category code you specify in the Map From Category Code field.
Map From Category Code	Use this field to set up defaults for your category codes. If the mapping type is 1, the Business Unit category code value you enter in this field is the default value for the Equipment category code you specify in the Map To Category Code field on this screen. If the mapping type is 2, the Equipment category code value you enter in this field is the default value for the Work Order category code you specify in the Map To Category Code field.

35.2.13 What You Should Know About

Topic	Discussion
Changing the responsible business unit	The system uses the responsible business unit from the equipment master to determine from which business unit to assign codes. If you change the responsible business unit for a piece of equipment, the system reassigns equipment category codes based on the new business unit.
Mapping default category codes with different values	The default values you set up on Category Code Mapping appear on Equipment Master only if the values are valid for the business unit and the equipment. For example, if you want to map the value for category code 05 from the business unit master to category code 08 on the equipment master, the values for both category code tables must match. The same applies when you map equipment category codes to work order category codes.
Mapping category codes with different character lengths	Several category codes throughout the system exceed three characters in length. The system truncates any codes longer than three characters that you map onto the equipment master or the work order master into a 3-character category code field.

35.3 Setting Up Supplemental Data

You can use supplemental data to further define the equipment in your system. The system stores detailed equipment information as supplemental data. After you set up supplemental data, you can use it to report on and track details about equipment which are important to your company, but are not included on the equipment master. You can define as many types of supplemental data as you need. You can also control which users have access to specific types of supplemental data.

You define and maintain supplemental data by equipment class. For example, you might set up supplemental data for an equipment class that includes motor graders. The data might include fuel capacities, oil readings, and so on. You can also set up a specific supplemental data type (SP) for specification sheets. Use specification sheets to track nameplate data and other static information.

You can use the following formats to record supplemental data:

Format	Description
Narrative (N)	Use this data type to access the Supplemental Text Entry screen. You can use this text format to enter unlimited text information about equipment.
Columnar (C)	Use this data type to access Supplemental Code Entry. When you set up supplemental data screens using this data type, you can define the columns into which you enter information. The system edits the values that you enter in the columns against the user defined code table that you set up in Data Type Definition.
Columnar-Message (M)	Use this data type to access Supplemental Code Entry. You can use this data type in the same way as the columnar type. The only difference is that the system edits the values you enter in the columns of this data type against the Generic Rates and Messages table that you set up in Generic Rates and Message Records. Standard Procedures is an example of Generic Rates and Messages. Standard Procedures is used in Preventive Maintenance and Work Orders.

The system stores the supplemental data types you set up in the Supplemental Data Types table (F12090).

Setting up supplemental data consists of the following tasks:

- Defining supplemental data types
- Defining specification data types
- Assigning supplemental data types to equipment
- Setting up supplemental data security

35.3.1 Defining Supplemental Data Types

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Supplemental Data

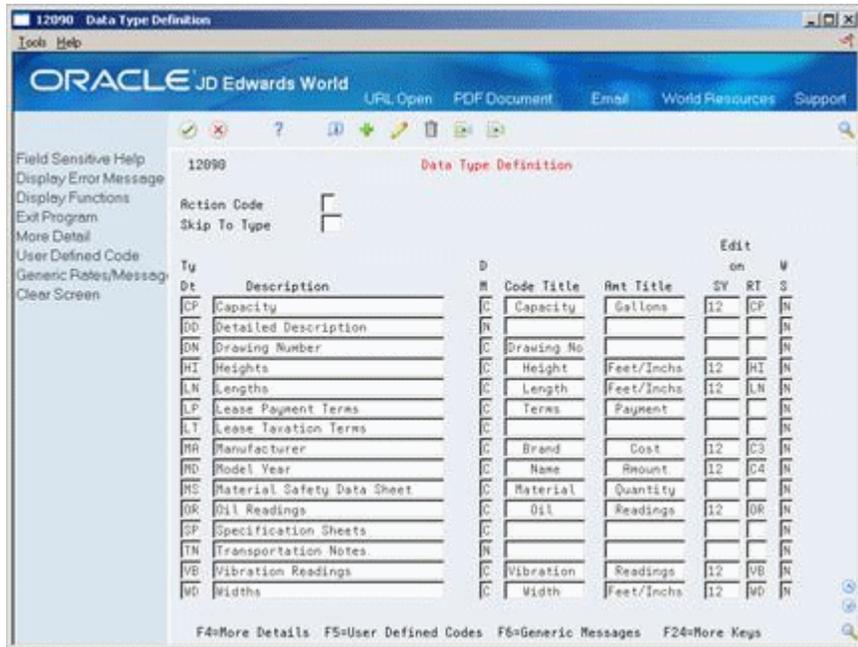
From Supplemental Data Setup (G1344), choose Data Type Definition

You must define the data types for the supplemental data that you want to maintain for your system. You can define as many types of supplemental data as you need. You can also specify that certain information stored in supplemental data be included as word search data when you perform query searches from Equipment Search.

To define supplemental data types

On Data Type Definition

Figure 35-7 Data Type Definition screen



1. Complete the following fields:
 - Type Data
 - Description
 - Display Mode
2. Complete the following optional fields:
 - Code Title
 - Amount Title
 - System Code (SY)
 - System Code (RT)
 - Word Search
3. Choose More Details.

Figure 35–8 Data Type Definition screen (Details area)

Ty	Dt	Description	Remark 1 Title	Remark 2 Title	D	M	Code Title	Amt Title	SY	RT	S	Edit
CP		Capacity			C		Capacity	Gallons	12	CP	N	on W S
DD		Detailed Description			N						N	
DN		Drawing Number			C		Drawing No.				N	
HI		Heights			C		Height	Feet/Inchs	12	HI	N	
LN		Lengths			C		Length	Feet/Inchs	12	LN	N	

4. Complete the following optional fields:

- Remark 1 Title
- Remark 2 Title

Field	Explanation
Ty Dt	A user defined code (system 12, type RT) used to group data. This code is alphanumeric and is typically an abbreviation, such as PT for lease payment terms, TX for lease taxation terms, and so on.
DM	<p>The format of a data type. This code determines the display mode for supplemental data. Valid codes are:</p> <p>C – Code format, which displays the screen for entering code-specific information. These codes are associated with User Defined Codes table (F0005).</p> <p>N – Narrative format, which displays the screen for entering narrative text.</p> <p>P – Program exit, which allows you to exit to the program you specified in the Pgm ID field.</p> <p>M – Message format, which displays the screen for entering code-specific information. However, the system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.</p> <p><i>Form-specific information</i></p> <p>Display Mode P is not used by the Equipment/Plant Management or Fixed Assets systems.</p>

Field	Explanation
WS	<p>This field determines whether you want to include the data stored under a particular supplemental data type in a word search of the supplemental database. The fields included in the word search are User Defined Code, Remark, Remark 2, and Narrative Text. To rebuild the data into the word search file, you must run the Build Search File for Fixed Assets program (P12BDWRD). This allows you to use the query search function on the Asset Search and Location screen (P1204) for the data in Supplemental Data. Valid codes are:</p> <p>Y – Include in word search N – Do not include in word search</p> <p>You can enter 1 for yes or 2 for no.</p>
Code Title	<p>The heading for a column on Supplemental Data Entry that relates to user defined codes. Enter the user defined codes for the supplemental data type in this column. For example, if the supplemental data type relates to the educational degrees of employees (BA, MBA, PHD, and so on), the heading could be Degree.</p>
Amt Title	<p>The heading for a column on Supplemental Data Entry that relates to an amount. This column contains statistical or measurable information. For example, if the data type relates to bid submittals, the heading could be Bid Amounts.</p>
SY	<p>A user defined code (98/SY) that identifies a JD Edwards World system.</p> <p><i>Form-specific information</i></p> <p>A system code (system 98, type SY), such as 12 for Fixed Assets. The system uses this code for verification when you enter a value in a Type Data field. If you enter a value that is not in the table, the system displays an error message. The Edit on SY field works with the Edit on RT field. It is available for data types with user defined codes, but is not required. If you do not enter values in the Edit on SY and Edit on RT fields, the Type Data field is free form and no cursor-sensitive help is available.</p> <p>Note: The Edit On function is not available for data types with narrative text.</p>
RT	<p>Identifies the table that contains user defined codes. The table is also referred to as a code type.</p> <p><i>Form-specific information</i></p> <p>A user defined code, such as PT for lease payment terms that the system uses for verification when you enter a value in a Type Data field. If you enter a value that is not in the table, the system displays error message. The Edit On function is available for data types with user defined codes, but it is not required. If you do not enter values in the Edit on RT and Edit on SY fields, the Type Data field is free form and no cursor-sensitive help is available.</p> <p>Note: The Edit On function is not available for data types with narrative text.</p>

35.3.2 What You Should Know About

Topic	Discussion
Defining user defined codes as valid values for a data type	<p>Use the following guidelines to define user defined codes as valid values for a data type:</p> <ul style="list-style-type: none"> ■ The user defined code table must be set up before you can set up the data type. ■ To assign a user defined code table to a data type, specify the install system and code type in the Edit on SY and Edit on RT fields. ■ If your supplemental data type does not relate to an existing user defined code or generic message code, you can set up a new user defined code table. <p>JD Edwards World recommends that you define the new tables for install systems 55 - 59. System 55 - 59 are reserved for client use. User defined code tables that you create for these systems will not be modified during any reinstall processes.</p> <p>See the <i>JD Edwards World Technical Foundation Guide</i> for more information about user defined codes.</p>
Defining specification sheets as a supplemental data type	<p>If you want to use specification sheets, you must define Specification Sheets as a type of supplemental data. Enter SP as the data type.</p> <p>See also Section 35.3.3, "Defining Specification Data Types"</p>

See Also:

- [Section 5.1.5, "Searching for Equipment by Query"](#) for more information about performing query searches.

35.3.3 Defining Specification Data Types

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Supplemental Data

From Supplemental Data Setup (G1344), choose Specification Cross Reference

Use specification data to define which types of static data, such as nameplate information, you want to record for a particular equipment class. For each equipment class, you can create up to 99 pages of data with as many as 16 data fields per page. You can set up the sequence in which the data appears and specify the names for the various data fields.

35.3.4 Before You Begin

- Define Specification Sheets as a supplemental data type. See [Section 35.3.1, "Defining Supplemental Data Types"](#).

To define specification data types

On Specification Cross Reference

Figure 35–9 Specification Cross Reference screen

Sequence Number	Description	Field Number	Field Type	Item Size	D	R	Syst	Us	File Name	R
1	Unit Number	01	R	12		L			F1201LB	N
2	Description	05	R	25		L				N
3	Horsepower	08	N	5	2	R				N
4	Phase	09	N	1	0	R				N
5	Voltage	10	R	3		L	12	F5		N
6	RPH	11	N	4	0	R				N
7	Enclosure	12	R	8		L				N
8	Frame	13	R	8		L				N
9	Frequency (HZ)	14	N	2	0	R				N
10	Type	15	R	6		L				N
11	NEMA Design	16	R	1		L				N
12	Manufacturer	07	R	3		L	12	CB		N
13	Model	06	R	15		L				N
14	Serial Number	02	R	25		L			F1201LC	N

1. Complete the following fields:
 - Category Code
2. Complete the following fields for each type of specification data that you want to define:
 - Sequence Number
 - Description
 - Field Number
 - Field Type
 - Item Size
 - Display Decimals (optional)
 - Right or Left (optional)
 - Required Field (optional)
3. To edit specification data against a user defined code, complete the following fields:
 - System Code
 - User Defined Code
4. To edit specification data against information in a specific table, complete the following field:
5. File Name
6. If an equipment class requires more than 16 specification data types, complete the following field to create a new page:
 - Page Number

Field	Explanation
Sequence Number	A number that is used to sequence specification data. For any item of specification data, enter the number in the order you want it to appear on the Specification Data Entry screen (V1216).
Field Number	This number defines which field in the Specification Data table you are setting up. For this field number, you can define a description, the sequence in which it will display, and any editing rules that you want to apply to the data.
Field Type	Enter the type of data that the user will enter in the field on the Specification Data Entry screen. Valid values are: A – Alpha Numeric N – Numeric D – Date T – Time
Item Size	The field size of the data item. Note: All amount fields should be entered as 15 bytes, 0 decimals, and the data item type should be P (packed). <i>Form-specific information</i> Enter the size of the data item. The lowest value you can enter is 1 character and the highest value is 99,999 characters.
File Name	The number of a specific table. For example, the General Ledger Master table name is F0901. See the Standards Manual on the programmers' menu for naming conventions. Within the Cross Reference Search facility, this represents names of all types of objects (that is, programs, tables, field names, data dictionary names, and so on). One special reserved name for displaying overall total RPG statistical information is "XRPGTOT" in combination with type="P" and to display type="#". For example, the table name for a French Electronic Funds Transfer is F04572F. <i>Form-specific information</i> Enter the number of the table you want the system to edit specification data values against. You can choose any table within any JD Edwards World system to edit against. However, the following tables have special features within the Equipment/Plant Management system: <ul style="list-style-type: none"> ■ Work Order Master (F4801) ■ Equipment Master by Item Number (F1201LA) ■ Equipment Master by Unit Number (F1201LB) ■ Short Address Book Number (F0101LA) ■ Purchase Order Master (F4301) ■ Inventory Master by Short Part Number (F4101LA) ■ Inventory Master by Long Part Number (F4101LB) If you specify one of these tables, the cursor-sensitive help screens for that field display a search screen or window for the table specified. In addition, the description of the data contained in the table appears as the description of the field on Specification Data Entry (V1216).

Field	Explanation
Disp Dec	Use this parameter to designate the number of decimals in the currency, amount, or quantity fields the system displays. For example, U.S. Dollars would be 2 decimals, Japanese Yen would be no decimals, and Cameroon Francs would be 3 decimals. <i>Form-specific information</i> For numeric specification data, if you do not enter a value in this field, the system uses a default value of 0.
Req Y/N	A code that specifies whether a value is required. The default is N for Not Required. Valid codes are: Y or 1 - This value is required to be valid. N or 0 - This value is not required.

35.3.5 What You Should Know About

Topic	Discussion
Specification data sequence	After you have defined a specification data item, you cannot change its sequence number. If you need to change the sequence in which a data item appears, you must type over existing data item information at the sequence number for which you want the data item to appear.

35.3.6 Assigning Supplemental Data Types to Equipment

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Supplemental Data

From Supplemental Data Setup (G1344), choose Data Type Cross Reference

You can define which types of supplemental data appear for a specific class of equipment. For example, you might want to track separate supplemental data types for electrical equipment and diesel-powered equipment. You can specify that supplemental data types for electrical equipment, such as voltage, amperage, and so on, do not appear for equipment for which the data is not applicable.

If you choose not to assign supplemental data types, all supplemental data types that you define will appear for all classes of equipment. You specify the category code that you want to use to define the equipment class on Equipment Constants.

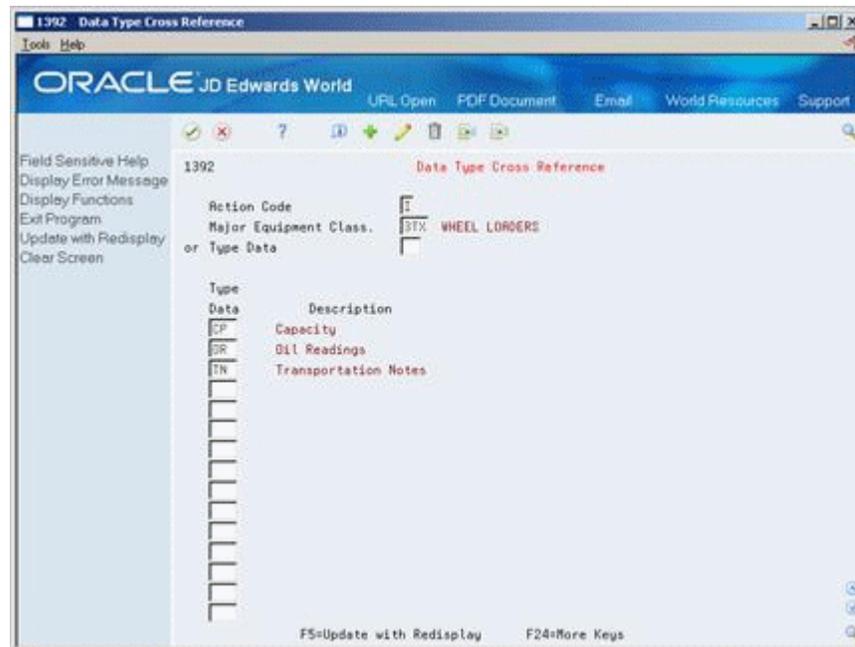
35.3.7 Before You Begin

- Define the supplemental category code on Equipment Constants. See [Section 35.2.1, "Setting Up Equipment Constants"](#).

To assign supplemental data types to equipment

On Data Type Cross Reference

Figure 35–10 Data Type Cross Reference screen



1. Complete the following field:

- Category Code Value

The value that you enter must be a value from the user defined code table you defined in equipment constants for supplemental data. For example, if you defined equipment category code 2 as your supplemental category code in equipment constants, you can enter any value from equipment category code 2 in this field.

2. Assign all data types that you want to associate with the type or class of equipment.

35.3.8 What You Should Know About

Topic	Discussion
Alternate display format	You can review all of the category codes for which a specific data type is valid by entering the data type in the Type Data field and leaving the Category Code Value field blank. All of the category codes appear for which that data type is valid.

35.3.9 Setting Up Supplemental Data Security

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Supplemental Data

From Supplemental Data Setup (G1344), choose Supplemental Data Security

You can set up supplemental data security to prevent or permit access to some or all supplemental data types according to the user ID. For example, you can allow a user to access all data types except the data type for lease payment terms (PT) or prevent a

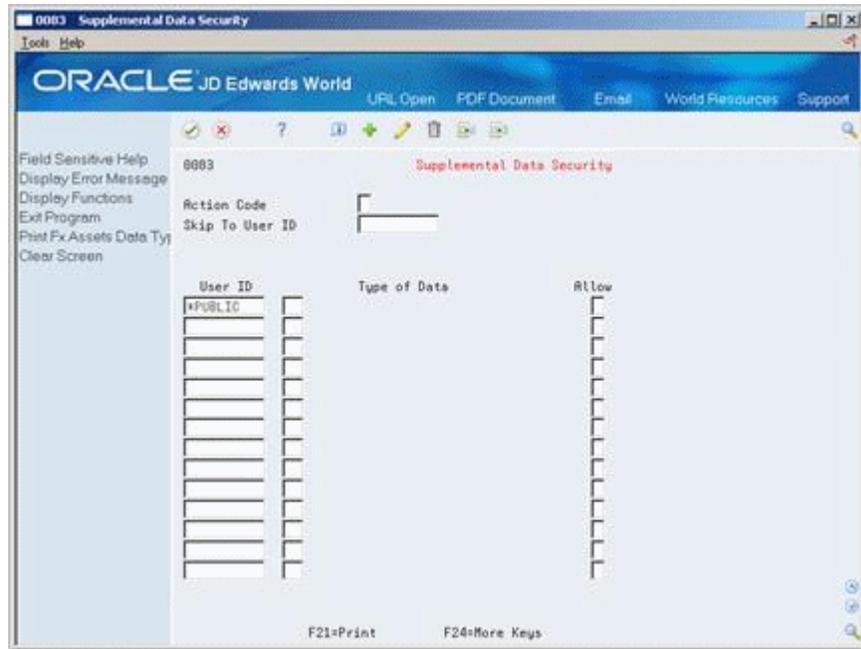
user from gaining access to any supplemental data. Supplemental data security allows you to maintain sensitive information about equipment.

All users have access to supplemental data types until you set up security.

Setting up supplemental data security consists of the following tasks:

- Preventing access to a data type
- Permitting access to a data type

Figure 35-11 Supplemental Data Security screen



To prevent access to a data type

On Supplemental Data Security

1. Complete the following fields:
 - User ID
 - Type of Data
2. Type N in the following field:
 - Allow

Field	Explanation
Allow	A code that indicates whether a user is allowed access to the function key or selection. Valid codes are: Y – Yes, allow access N – No, prevent access blank – Yes, allow access (default).

To permit access to a data type

On Supplemental Data Security

1. Complete the following fields:

- Type of Data
 - User ID
2. Type Y in the following field:
 - Allow
 3. Type *PUBLIC in the following field:
 - User ID
 4. Type N in the following field:
 - Allow

Note: Typing N in the Allow field for *PUBLIC prevents all users other than those for whom you have allowed access from accessing supplemental data types.

35.4 Setting Up Shop Cost Inquiry

You use Shop Cost Inquiry to review maintenance costs for an individual shop by repair code. Before you can use Shop Cost Inquiry, you must define the information that you want to review, and the sequence in which you want to view it. You define the information that you want to review by defining and naming inquiry columns, such as budget amount, actual amount, and so on. You must also provide the system with a formula for calculating the amount or quantity that corresponds to an inquiry column. You can define as many columns as you need.

After you define the columns, you can combine them into different inquiry formats. You use inquiry formats to group specific columns of information into a meaningful display. You can set up different inquiry formats for Shop Cost Inquiry that meet your specific business needs. You can include up to four columns of information in an inquiry format. You can then name the inquiry format and provide a description of the information that the columns represent, such as Maintenance - Budget to Actual Comparison, where Maintenance is the name of the inquiry format, and Budget to Actual Comparison is the description.

After you set up inquiry formats, you can set up the sequence in which the formats appear. You use inquiry paths to set up this sequence. When you access Shop Cost Inquiry, you can toggle between the different inquiry formats according to the sequence you set up.

Setting up Shop Cost Inquiry consists of the following tasks:

- Defining inquiry columns
- Defining inquiry formats
- Defining inquiry paths

35.4.1 Defining Inquiry Columns

Navigation

From Job Cost (G51), enter 29

From Job Cost System Setup(G5141), choose Define Inquiry Columns

You must define the columns for Shop Cost Inquiry. When you define a column, you can include the following information.

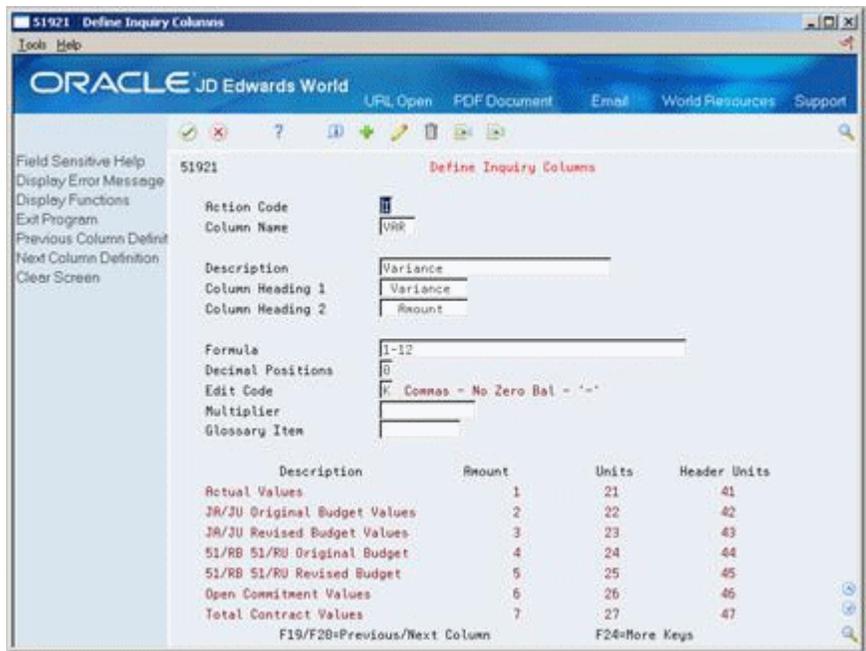
- **Heading:** The description of the information that the column represents
- **Formula:** The calculation that the system uses to determine the amounts or units that appear for the column
- **Display format:** Information about how the amounts or units appear, such as decimal position, whether to include commas, and so on
- **Glossary item:** Information from the data dictionary appears when the user accesses field help for the inquiry column

Inquiry column information is stored in the Inquiry Columns table (F5192).

To define inquiry columns

On Define Inquiry Columns

Figure 35–12 Define Inquiry Columns screen



1. Complete the following fields:
 - Column Name
 - Formula
2. Complete the following optional fields:
 - Description
 - Column Heading 1
 - Column Heading 2
 - Decimal Positions
 - Edit Code
 - Multiplier
 - Glossary Item

Field	Explanation
Column Name	Identifies a column set up for the Job Status Inquiry screen. It is an alphanumeric code.
Formula	<p>A calculation that the system uses to input an amount or quantity in this column. You can use a single predefined value or multiple predefined values in conjunction with mathematical operators to enter a formula. Valid mathematical operators are:</p> <ul style="list-style-type: none"> + – Add - – Subtract * – Multiply / – Divide () – Left and right parentheses for nesting <p>For example, you can enter the following formula to have the system calculate on-time percentages:</p> $20/(20+21+22)$ <p>The formula above equals on-time percentages because:</p> <ul style="list-style-type: none"> ■ 20 is the value for on-time amounts ■ 21 is the value for early amounts ■ 22 is the value for late amounts
Column Heading 1	The first line in the heading that describes the column. The system automatically centers this line for the column.
Decimal Positions	The number of characters that display to the right of the decimal point. For example, if you enter 2, the amount or quantity in this column would have two characters to the right of the decimal point, such as 7.00.
Edit Code	<p>Determines how data is printed or displayed. Depending on the code, you can change the appearance of the fields as follows (standard IBM edit codes):</p> <ul style="list-style-type: none"> ■ Show commas - 1, 2, A, B, J, K, N, or O ■ Show decimal point - 1, 2, 3, 4, A, B, C, D, J, K, L, M, N, O, P, Q ■ Show sign for negative - A, B, C, D ("CR") or J through Q ("-") ■ Suppress leading zeros - 1 through 4, A through D, J through Q, Y and Z <p>Refer to user defined codes (system 98/ type EC) for all valid codes, including additional JD Edwards World edit codes.</p>
Multiplier	<p>The factor by which the amounts or unit quantities in a column are multiplied. The result of the calculation in the Formula field is multiplied by this factor before it is displayed on the Job Status Inquiry screen.</p> <p>For example, if you want to scale down extremely large numbers to thousands, type .001 in this field. If you want percentages to be displayed as whole numbers, type 100.</p>
Glossary Item	The item in the Data Dictionary file (F9201) that describes the information a column represents on the Job Status Inquiry screen. The related glossary description is displayed when the cursor is in the column and you press F1 (cursor sensitive help).

35.4.2 What You Should Know About

Topic	Discussion
Creating formulas	<p>The following list includes examples of different ways that you can combine the codes and mathematical functions to create formulas:</p> <ul style="list-style-type: none"> ■ Actual amount: 1 ■ Actual unit rate: 1/21 ■ Total commitments: 1+6 ■ Unit rate variance: (1/21) - (5/25) <p>If the column relates only to a specific value contained in a ledger, the formula consists of only one code.</p>
Adding formula codes	<p>You can revise and add your own user defined formula descriptions and inquiry ledger types. The system stores formula descriptions in user defined codes table 55/IL.</p>

35.4.3 Defining Inquiry Formats

Navigation

From Job Cost (G51), enter 29

From Job Cost System Setup(G5141), choose Define Inquiry Formats

After you define the columns for Shop Cost Inquiry, you can group them into formats. A format can include up to four columns, which appear on Shop Cost Inquiry in the same order that you define them in the format. You are not required to assign a column to each of the four column fields. The system stores format definitions in the Inquiry Formats table (F5193).

35.4.4 Before You Begin

- Define inquiry columns. See [Section 35.4.1, "Defining Inquiry Columns"](#)

To define inquiry formats

On Define Inquiry Formats

Figure 35–13 Define Inquiry Formats screen

Complete the following fields for each format:

- Format Name
- Description
- Column 1
- Column 2
- Column 3
- Column 4

Field	Explanation
Format Name	Identifies a format, which is a sequence of up to four columns for the Job Status Inquiry screen. It is an alphanumeric code. <i>Form-specific information</i> The Skip to Format Name field in the upper part of the screen lets you specify the format you want displayed at the top of the list.

35.4.5 Processing Options

See [Section 57.2, "Define Formats - Job Status Inquiry \(P5193\)"](#)

35.4.6 Defining Inquiry Paths

Navigation

From Job Cost (G51), enter 29

From Job Cost System Setup(G5141), choose Define Inquiry Paths

After you define the inquiry formats for Shop Cost Inquiry, you can group them into paths. A path is a sequence of inquiry formats. When you access Shop Cost Inquiry,

Field	Explanation
Path Name	Identifies a path, which is a sequence of formats for the Job Status Inquiry screen. It is an alphanumeric code.

35.4.8 Processing Options

See [Section 57.3, "Define Paths - Job Status Inquiry \(P51941\)"](#).

Set Up User Defined Codes

This chapter contains this topic:

- [Section 36.1, "Setting Up User Defined Codes"](#)

36.1 Setting Up User Defined Codes

Navigation

From **Equipment/Plant Management (G13)**, enter **29**

From **Equipment/Plant Management Setup (G1341)**, choose **User Defined Codes**

Many fields throughout Equipment/Plant Maintenance accept only user defined codes. You can customize fields in your system by setting up user defined codes to meet the needs of your business environment.

User defined codes are stored in tables related to a specific system and code type. For example, 12/EM represents system 12 (Fixed Assets) and user defined code list EM (Equipment Message types). User defined code tables determine which codes are valid for the individual fields in your system. If you enter a code that is not valid for a field, the system displays an error message. For example, you can only enter codes in the major accounting class code field on Master Information that exist in the user defined code table for system 12 and code type C1 (Major Accounting Class).

You can access all user defined code tables through a single user defined code screen. After you select a user defined code screen from a menu, change the system code field and the user defined code type field to access another user defined code table. The system stores user defined codes in the User Defined Codes table (F0005).

Caution: User defined codes are central to JD Edwards World systems. You must be thoroughly familiar with user defined codes before you change them.

The following user defined codes are primary to Equipment/Plant Maintenance.

36.1.1 Major Accounting Class (12/C1)

Use these codes to group equipment into categories, such as office equipment, furniture, heavy equipment, plant equipment, and so on.

JD Edwards World recommends that you set up a one-to-one relationship with major accounting class and the asset cost account.

36.1.2 Major Equipment Class (12/C2)

Use these codes to further categorize equipment into subclasses. For example, set up codes to divide office equipment into groups such as copiers, computers, printers, and so on.

36.1.3 Additional Class (12/C3-C0, 12/F1-F0, 12/21-23)

Use these codes to further group equipment into meaningful classifications based on your needs. JD Edwards World provides many predefined values. You can use the predefined values or modify them to your business needs. For instance, category code 3 (12/C3) is set up as Manufacturer, category code 4 (12/C4) is Model Year, and so on.

If you use Equipment Billing, you must use category code 10 to define billing rate groups.

36.1.4 Equipment Status (12/ES)

Use these codes to identify the operational status of equipment, such as whether it is available, working, down, or disposed.

Equipment status codes might also be used by the Fixed Assets system to track types of disposals.

36.1.5 Equipment Message Type (12/EM)

Use these codes to define and group different types of messages, such as planned maintenance, problem reporting, lease terms, and so on.

36.1.6 Finance Methods (12/FM)

Use these codes to specify how a piece of equipment was acquired, such as leased or purchased outright. Finance method information is stored in the Item Master table (F1201).

36.1.7 Ledger Types for Equipment Journal Entries (12/LT)

Use these codes to define the ledger types for various sets of books. The default ledger type for equipment transactions is AA (Actual Amounts). Any ledgers that you define in user defined code table 12/LT are in addition to the AA ledger. You are not required to specify any ledgers in this table.

Use special handling codes to indicate how you want the system to process data for these additional ledgers. Valid codes for this table's special handling codes are as follows:

- 1: Disconnect cost from the AA ledger
- 2: Post to equipment but not to the general ledger
- 9: Never post ledger to equipment
- blank: Create journal entries for this ledger

Note: You must also define all additional ledger types on General Accounting Ledger Types (system 09, type LT).

36.1.8 Preventive Maintenance Service Type Codes (12/ST)

Use these codes to identify the different types of maintenance tasks that you assign to the PM schedules for each piece of equipment.

36.1.9 Preventive Maintenance Status Codes (12/MS)

Use these codes to identify the status of a maintenance task at a specific time. For example, you might set up a code to indicate that a maintenance task is waiting for parts and another code to indicate that the work is in progress.

Equipment/Plant Maintenance includes the following predefined status code values, which have special meaning to the system:

- 01: Maintenance schedule defined
- 98: Maintenance canceled
- 99: Maintenance complete

You can create any other status codes that you need.

36.1.10 Preventive Maintenance Category Code 01 (13/P1)

Use these codes to categorize PM schedules. For example, set up codes to divide PM schedules into groups, such as critical PMs and non-critical PMs.

36.1.11 Preventive Maintenance Category Code 02 (13/P2)

Use this code to further group PM schedules into categories.

36.1.12 Predictive Flag Codes (13/PF)

Use these codes in conjunction with third party predictive maintenance systems to indicate that maintenance is due for a piece of equipment. You can use predictive maintenance systems to update PM schedules based on the analysis of equipment operating parameters such as temperature and vibration readings, chemical analysis of lubricants, and so on.

36.1.13 Type Codes (00/TY)

Use these codes to group work orders by type. The system displays this classification code field on Enter Work Orders and Backlog Management.

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

36.1.14 Work Order Priority Codes (00/PR)

Use these codes to group work orders by priority. The system displays this classification code field on Enter Work Orders and Backlog Management.

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

36.1.15 Work Order Status Codes (00/SS)

Use these codes to group work orders by current condition. You can update the status code for a work order as work progresses. The system displays this classification code field on Enter Work Orders and on Backlog Management.

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

36.1.16 Work Order Category Code 01 (00/W1)

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

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

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

36.1.17 Additional Work Order Category Codes (00/W2 - W0 and 00/X1 - X0)

Use category codes 02 - 20 to customize and further define your work orders. Category codes 02 - 20 have no predefined values. The system displays the first ten category codes on Backlog Management. You can set up these codes to help you limit your search for work orders on Backlog Management.

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

- Operator error
- Design flaw
- Lubrication or cooling problem

36.1.18 Work Order Databases (00/WD)

Use to group supplemental data types for work orders. You can define as many supplemental data types for a specific work order database as you need.

See Also:

- [Section 38.6, "Setting Up Work Order Supplemental Data"](#)

36.1.19 Work Order Document Types (00/DT)

Use these codes to differentiate between different types of work order transactions in the general ledger. For example, you can create document types for preventive maintenance work orders, corrective maintenance work orders, and so on.

36.1.20 Record Type Codes (00/RT)

Use record type codes to divide and organize the descriptive information that you enter and track for your work orders. For example, you might set up record types to include the following types of information:

- Tool and equipment instructions
- Safety provisions
- Equipment down time

See Also:

- [Section 20.5, "Adding Text to a Work Order"](#)

36.1.21 Forecast Type (34/DF)

Use forecast types to distinguish different material planning forecasts. For example, you might set up different forecast types for maintenance parts forecasts and manufacturing materials forecasts.

You can use the same forecast type for PM projections and parts plans.

36.1.22 Summary Document Types (48/DC)

Use these codes to define the document types that the system displays on Cost by Work Order. For example, you can set up codes for the following document types:

- Inventory issues
- Work order inventory issues
- Accounts payable entries
- Time entries

36.1.23 Approval Type (48/AP)

Use these codes to define the approval types that you assign to work order approval routings.

36.1.24 Inventory document type (48/ID)

Use these codes to define the inventory document types that the system displays on the work order Estimate to Actual Variance screen. For example, you can set up codes for the following types of inventory issues:

- Inventory issues
- Work order inventory issues

36.1.25 Bill Type (40/TB)

Use these codes to define the types of parts lists that you can assign to a work order, such as preventive maintenance parts lists, corrective maintenance parts lists, and so on.

36.1.26 Routing Type (40/TR)

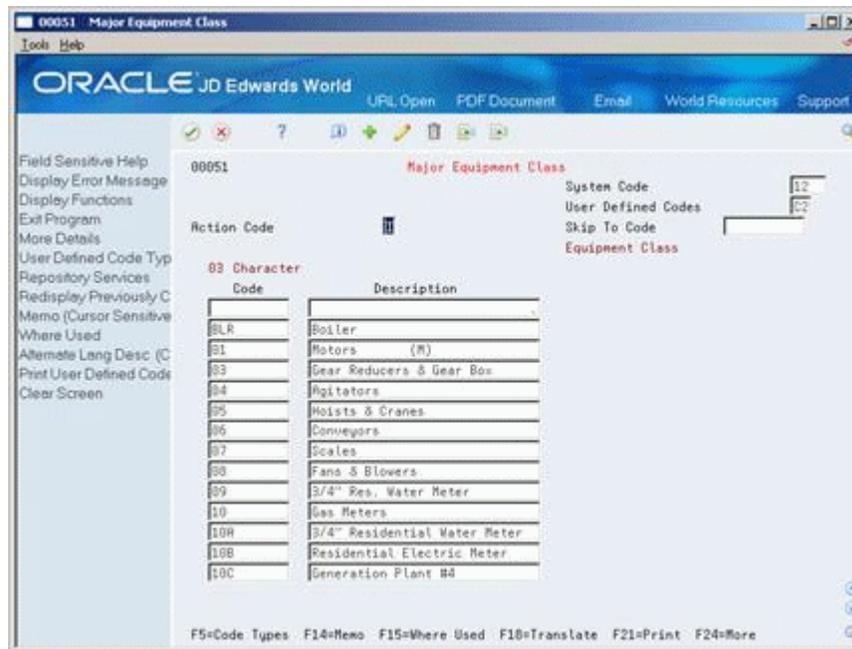
Use these codes to define the types of labor routing instructions you can assign to a work order, such as preventive maintenance instructions, corrective maintenance instructions, and so on.

36.1.27 Example: User Defined Codes Screen

The following is an example of a user defined codes screen. When you access a user defined code, the screen looks like this, with these exceptions:

- The title is the name of the user defined code.
- The Character Code field accepts 1, 2, 3, or 10 characters, depending on the code.
- Some user defined codes contain a field for a second line of description.

Figure 36–1 Major Equipment Class screen



To set up a user defined code

On any user defined codes screen

1. To locate the user defined code table that you want to set up or revise, complete the following fields:
 - System Code
 - User Defined Codes
2. To revise the user defined code table, complete the following fields:
 - Character Code
 - Description

36.1.28 What You Should Know About

Topic	Discussion
Integrating with the Fixed Assets system	Equipment/Plant Maintenance uses the category codes from the Fixed Assets system. Depending on how you set up your constants, the system displays only the first five or ten codes on some forms, such as Equipment Search. JD Edwards World recommends that you assign specific equipment needs to as many of the first 10 category codes as you need. This will help you perform online searches for equipment. You can then use the remaining codes for fixed asset reporting needs.
Defining blank as a valid value	If you have set up a user defined code for which you do not require a value to be entered, you must define blank as a valid value. To do so, leave the Character Code field blank, but enter at least one character in the description field. JD Edwards World recommends that you type a period in the last position in the field.

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about setting up user defined codes

Set Up PM Schedule Information

This chapter contains these topics:

- [Section 37.1, "Setting Up PM Schedule Information"](#)
- [Section 37.2, "Setting Up Standard Procedures"](#)
- [Section 37.3, "Setting Up Maintenance Rules"](#)

37.1 Setting Up PM Schedule Information

Preventive maintenance (PM) schedules are the foundation of your preventive maintenance program. PM schedules determine the types of service and the frequency of each service type for each piece of equipment that you maintain.

Before you can use the preventive maintenance features of Equipment/Plant Maintenance, you must provide the system with standard procedures and maintenance rules.

You can assign standard procedures to various maintenance tasks when you set up a PM schedule for a piece of equipment. The system uses standard procedures in the same way as user defined codes, with the exception that you can attach virtually unlimited text to a standard procedure.

Maintenance rules determine when the system schedules preventive maintenance tasks. In addition, maintenance rules can:

- Determine the status of scheduled tasks.
- Assign default values for the assigned work order.
- Assign default values for the business unit to be charged for the maintenance task.
- Determine when maintenance is due based on threshold percentages.

37.1.1 Before You Begin

- Set up standard procedures and maintenance rules.
- Verify that the following user defined codes have been set up:
 - Service types (12/ST)
 - Maintenance status (12/MS)
 - Work order type (00/TY)
 - Work order priority (00/PR)
 - Work order status (00/SS)

See Also:

- [Section 36.1, "Setting Up User Defined Codes"](#)

37.2 Setting Up Standard Procedures

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Preventive Maintenance

From Maintenance Setup (G1345), choose Standard Procedures

You can define standard procedures (standard instructions) that apply to your PM schedules and work orders. You can then add unlimited text to describe the procedures. For example, assume that you have set up a service type for a 500-hour equipment inspection. You can define a standard procedure for a 500-hour equipment inspection and add text that describes the steps required for the inspection.

You can also copy text from other standard procedures. For example, you can copy text from a 250-hour inspection that also applies to the procedures for a 500-hour inspection.

After you set up standard procedures, you can attach them to the following programs:

- Work Order Entry
- Item PM Schedule
- Equipment Work Order Routings

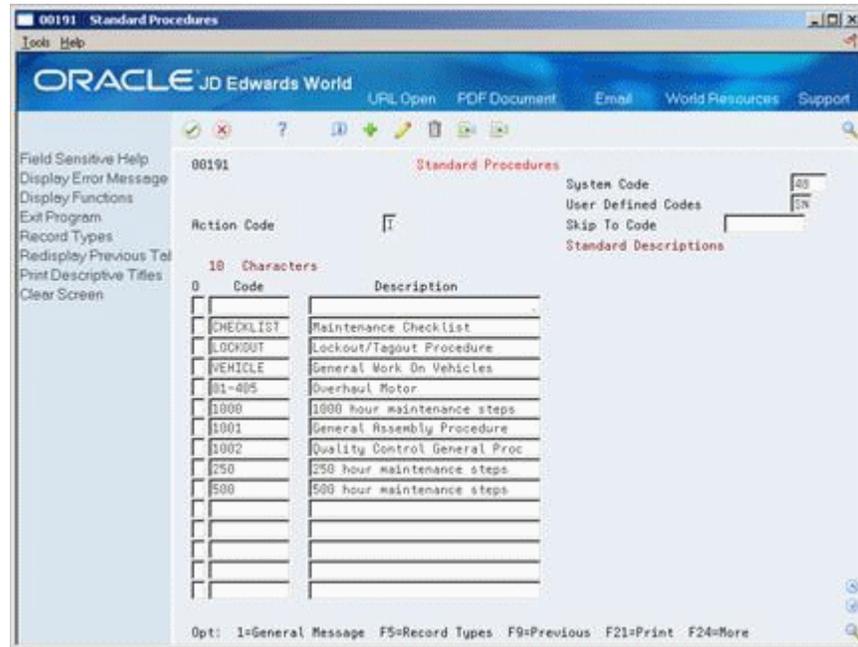
Setting up standard procedures consists of the following tasks:

- To define standard procedures
- To add text to a procedure
- To copy text from other procedures

To define standard procedures

On Standard Procedures

Figure 37-1 Standard Procedures screen



Complete the following fields to define each procedure:

- Code
- Description

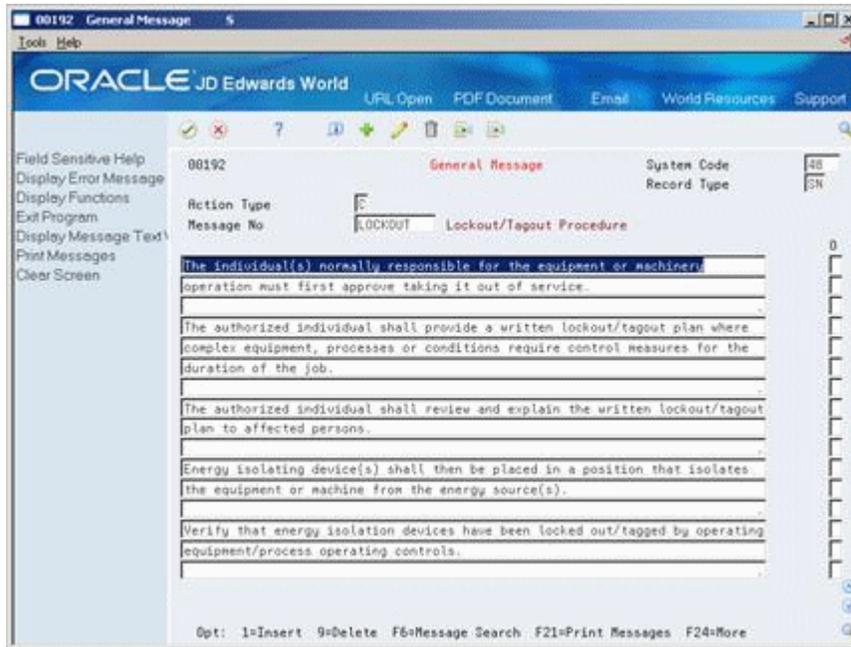
Field	Explanation
Code	This column contains a list of valid codes for a specific user defined code list. The number of characters that a code can contain appears in the column title.

To add text to a procedure

On Standard Procedures

1. Choose General Message for each procedure for which you want to add text.

Figure 37–2 General Message screen



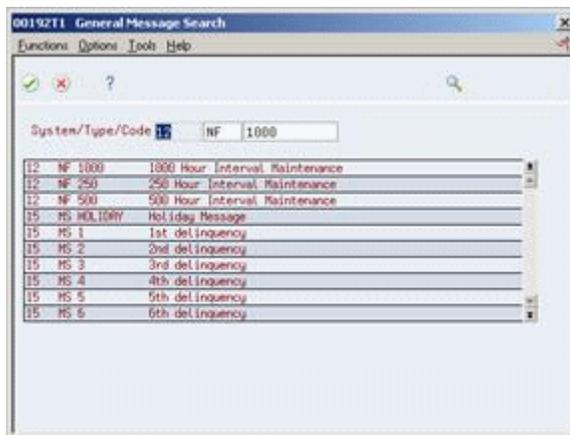
2. On General Message, enter text for each standard procedure.

To copy text from other procedures

On Standard Procedures

1. Choose the General Message option for each procedure for which you want to add text.
2. On General Message, choose Message Search.

Figure 37–3 General Message Search screen



3. On General Message Search, complete the following fields to narrow your search to a particular message:
 - System
 - Type (Optional)
 - Code (Optional)

4. Choose Enter.
5. To import the text into the procedure, choose Select.

Field	Explanation
System Code	A user defined code (98/SY) that identifies a JD Edwards World system.
Record Type	Identifies the table that contains user defined codes. The table is also referred to as a code type.

37.3 Setting Up Maintenance Rules

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Preventive Maintenance

From Maintenance Setup (G1345), choose Maintenance Rules Table

To use the preventive maintenance features in Equipment/Plant Maintenance, you must set up maintenance rules. Maintenance rules determine the maintenance status that the system assigns to a PM for a service type when the service type is due to be performed.

For example, assume you have defined a service type for equipment lubrication, with a 100-hour maintenance interval. Also assume that you have defined maintenance rules for that service type that direct the system to assign a maintenance status of 50 (Maintenance Due) whenever 100 hours have elapsed. After 100 hours have elapsed and you update the PM schedule status, the system automatically assigns a maintenance status of 50 to the PM for equipment lubrication.

In addition to assigning a maintenance status to PMs, you use maintenance rules to:

- Define the threshold percentage when maintenance is due.
- Determine the assigned work order status, type, and priority, if you use model work orders.
- Specify whether the system assigns the Charge to Business Unit on the assigned work order based on the Charge to Business Unit on the model work order or the responsible business unit from the equipment master.
- Specify the status of associated service types that might already be scheduled and combine work orders for associated service types on to the work order for the primary service type.
- Specify the approval type for assigned work orders.
- Specify whether the description that appears on assigned work orders is based on the service type description or the description on the model work order.

37.3.1 How Does the System Apply Maintenance Rules?

When the system searches for rules to apply to a maintenance task, it uses the following sequence:

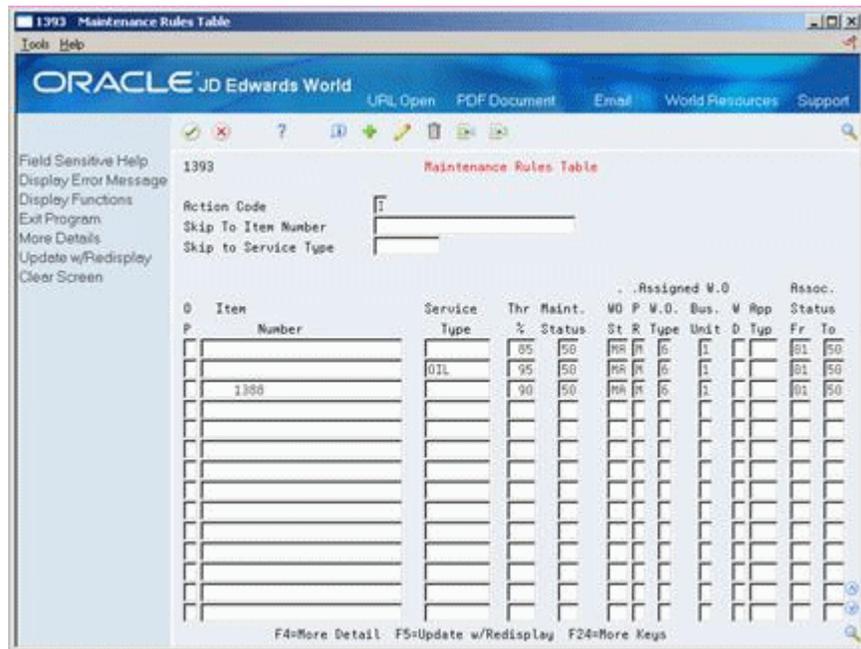
1. Search for and apply a rule for which both an equipment number and a service type have been assigned.

2. Search for and apply a rule for which an equipment number has been assigned, but no service type.
3. Search for and apply a rule for which a service type has been assigned, but no equipment number.
4. Apply a global default rule for which no equipment number or service type has been assigned.

To set up maintenance rules

On Maintenance Rules Table

Figure 37–4 Maintenance Rules Table screen



1. Complete the following fields:
 - Item Number
 - Service Type
 - Thr (Threshold) %
 - Maint. Status
2. Complete the following Assigned W.O. fields:
 - WO St (Status)
 - PR (WO Priority)
 - W.O. Type
 - Bus. Unit
 - WD (WO Description Flag)
 - App (Approval) Typ
3. Complete the following fields:
 - Assoc. (Associated) Status From

- Assoc. Status To

Field	Explanation
Threshold Percent	<p>A percentage measure that indicates how close a piece of equipment is to needing maintenance. This percentage is based on the greater of the actual date, miles, hours, or fuel consumption. A percentage of 090 indicates that the piece of equipment is 10% away from needing maintenance. A percentage greater than 100 indicates that maintenance is past due.</p> <p>Note: Miles, hours, and fuel are only examples of statistical units. You can define other statistical units appropriate to your organization within the Equipment/Plant Management automatic accounting instructions.</p>
Maint Status	<p>A user defined code (12/MS) that indicates the maintenance status of a piece of equipment, such as 50 for maintenance due or 60 for waiting for parts.</p> <p>Note: Status code 98 is reserved for canceled maintenance. Status code 99 is reserved for completed maintenance. Status code 01, the default, is reserved for initial maintenance setup.</p>
WO St	<p>A user defined code (system 00, type SS) that describes the status of a work order.</p>
Priority	<p>A user defined code (system 00, type PR) that indicates the relative priority of a work order or engineering change order in relation to other orders.</p> <p>A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work order you create on those forms and on the Project Setup screen. You can either accept or override the default value.</p>
W.O. Type	<p>A user defined code (00/TY) that indicates the type classification of a work order or engineering change order.</p> <p>You can use work order type as a selection criteria for work order approvals.</p>
Bus Unit	<p>A code that determines which Business Unit will be used as the Charge to Business Unit on Assigned Work Orders that are created when items are scheduled for maintenance.</p> <p>Values are:</p> <p>1 – Use the Charge to Business Unit from the Model Work Order on the Assigned Work Orders.</p> <p>2 – Use the Responsible Business Unit from the Item Master (F1201) as the Charge to Business Unit on the Assigned Work Orders.</p>
W D	<p>A code that determines which Description will be used as the Description on Assigned Work Orders that are created when items are scheduled for maintenance. Values are:</p> <p>1 – Use the Description from the Model Work Order on the Assigned Work Orders.</p> <p>2 – Use the Description from the Service Type on the Assigned Work Orders.</p>

Field	Explanation
App Typ	<p>A user defined code (system 48, type AP) indicating the type of work order approval path that a work order follows. You can use processing options to specify a default approval type based on the type of work order.</p> <p><i>Form-specific information</i></p> <p>This is the approval path that the work order follows when you create a PM work order.</p>
Assoc Status	<p>The first code in a range of codes that identifies which associated service types already scheduled for maintenance should be grouped together. These service types are grouped with the primary service type and assigned to the same work order. For example, if a monthly vehicle inspection and an annual vehicle inspection occur in the same month, the system would group the monthly inspection (associated service type) with the annual inspection (primary service type) and assign it to the same work order.</p>

37.3.2 What You Should Know About

Topic	Discussion
Minimum setup requirements	<p>You must set up a global default maintenance rule with a blank equipment number and a blank service type.</p>
Default maintenance rules	<p>For any equipment whose maintenance rules must deviate from the global default rule, you can create specific rules that include the equipment number and service type.</p> <p>You can also set up default rules by:</p> <ul style="list-style-type: none"> ■ Equipment number with no service type ■ Service type with no equipment number <p>The system applies a rule with an equipment number assigned before it applies a rule for which only a service type has been assigned. For example, assume the system is processing the PM for motor grader 337, service type lubrication. If a maintenance rule exists for the motor grader and another rule exists for service type lubrication, the system applies the rule to which the motor grader is assigned.</p>

See Also:

- [Section 15.6, "Creating a Model Work Order"](#) for more information about assigned work orders
- [Section 15.3, "Linking Service Types"](#) for more information about associated service types and threshold percentage

Set Up Work Orders

This chapter contains these topics:

- [Section 38.1, "Setting Up Work Orders"](#)
- [Section 38.2, "Setting Up Default Managers and Supervisors"](#)
- [Section 38.3, "Setting Up Work Order Next Numbers"](#)
- [Section 38.4, "Setting Up Record Types"](#)
- [Section 38.5, "Setting Up the Work Order Life Cycle"](#)
- [Section 38.6, "Setting Up Work Order Supplemental Data"](#)
- [Section 38.7, "Setting Up Standard Parts Lists and Work Order Instructions"](#)
- [Section 38.8, "Defining Default Location and Printers"](#)
- [Section 38.9, "Setting Up Supply and Demand Inclusion Rules"](#)

38.1 Setting Up Work Orders

Before you can use the work order features in Equipment/Plant Maintenance, you must provide the system with information necessary to customize work orders for your business needs. For example, you can set up different managers and supervisors for work orders, based on work order category codes. When you assign category codes to a new work order, the system automatically assigns the correct managers and supervisors.

In addition to setting up managers and supervisors, you must set up the following:

Information	Description
Work order next numbers	You set up the beginning number for work orders. The system assigns a unique number for each work order generated.
Record type information	You use record types to organize and track detailed information about a work order, such as its full description, final disposition, and so on. You can then track the information according to the record type to which you assigned the information.
Work order life-cycle information	You can set up rules that specify what statuses (steps) a work order must go through, such as work order entered, work order approved, and so on. You can also specify who can approve work orders. In addition, you can specify a currency amount, over which an approver must approve the work order.

Information	Description
Work order supplemental data	You use work order supplemental data to track work order information that is not included on the work order master or record types. You can specify what data you want to track and how the data appears.
Standard parts lists and work order instructions	<p>You can set up standard parts lists for work orders. You use a standard parts list when the maintenance task for which the work order applies is routine and repetitive, and for which you have advance knowledge of the parts requirements.</p> <p>You can set up standard work order instructions for a work order. Work order instructions specify the sequence of operations required to complete a work order, as well as the work centers responsible for each operation. You use standard work order instructions when the maintenance task for which the work order applies is routine and repetitive, and for which you have advance knowledge of the labor requirements.</p> <p>To use standard work order instructions, you must set up work center information and information about the sequence of operations.</p>
Default user locations and printers	Many of the forms within the Work Order system require you to specify a location, such as a branch or plant, to which you are assigned. You can set up default locations for each person in your organization that uses the Work Order system. You can also assign a default print queue to each person. When a person prints a work order, the system uses the default print queue that you set up, unless the person specifies otherwise.
Supply and demand inclusion rules	You must set up rules that govern which document types and document statuses create a supply or demand for parts.

Due to system integration, you must access other JD Edwards World systems to complete certain setup tasks. The guidelines for completing these tasks are discussed as needed in this chapter.

38.2 Setting Up Default Managers and Supervisors

Navigation

From Equipment/Plant Management Setup (G1341), choose Work Order Setup

From Work Order/Service Billing Setup (G4841), choose Default Managers and Supervisor

When you create a work order, you can specify that the system automatically enter the address book information for managers and supervisors based on any combination of the first three work order category codes. The system automatically enters address book values in the following fields on Work Order Entry and Backlog Management:

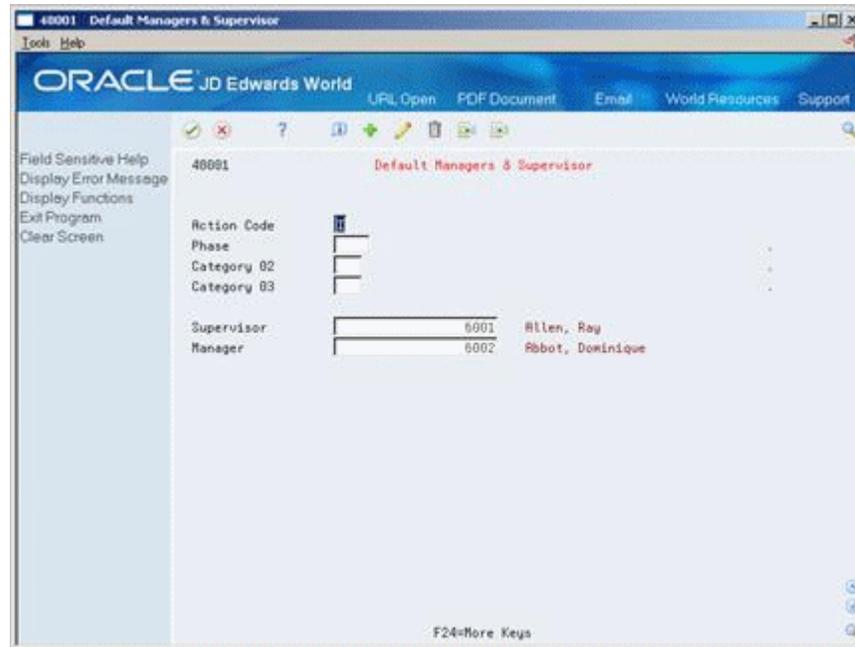
- ANPA (Supervisor)
- ANSA (Manager)

You can set up as many versions of default managers and supervisors as you need. For example, you can assign a specific manager and supervisor to every work order with a failure code (category code 02) of F1 - Improper start-up or operation. You can assign another manager and supervisor to every work order with a failure code of F2 - Improper installation or repair.

To set up default managers and supervisors

On Default Managers and Supervisor

Figure 38–1 Default Managers & Supervisor screen



Complete any of the following fields:

- Phase (Category Code 1)
- Category Code 02
- Category Code 03
- Supervisor
- Manager

You must complete at least one category code field and one address book field for each version of default managers and supervisors that you set up.

Field	Explanation
Phase	<p>A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.</p> <p>Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a screen for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup screen. You can either accept or override the default value.</p>

Field	Explanation
Supervisor	<p>The address book number of the supervisor.</p> <p>Note: A processing option for some forms allows you to enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers & Supervisor screen. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. You can either accept or override the default value.</p>
Manager	<p>The address book number of a manager or planner.</p> <p>Note: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors screen. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. (You can either accept or override the default value.)</p>

38.3 Setting Up Work Order Next Numbers

Navigation

From Equipment/Plant Management Setup (G1341), choose Next Numbers

When you set up work order next numbers, you enable the system to automatically assign unique numbers for each work order generated by you or the system.

The system stores next numbers for work orders in the Work Orders/Service Billing system (system 48). The system generates next numbers from the Next Numbers table (F0002).

Caution: JD Edwards World strongly recommends that you do not use blank as a next number value.

To set up work order next numbers

On Next Numbers

Figure 38–2 Next Numbers screen

Use	Next Number	Check Digit
Work Order No.	39974	V
Billing Control	13397	N
Invoice #	1	N
Component Link	2005	N
Split Link	9	N
ECO Number	99354	V
Schedule Number	40	N

CAUTION:
Changing the data on this screen may make it impossible to retrieve previously added addresses and may result in attempts to assign duplicate numbers.

F8=Next Numbers by Co/FY F24=More Keys

1. To locate next numbers for a particular system, complete the following field:
 - System Code
2. Complete the following fields for each number that you need to set up:
 - Next Number
 - Check Digit

38.4 Setting Up Record Types

Navigation

From **Equipment/Plant Management Setup (G1341)**, choose **Work Order Setup**

From **Work Order/Service Billing Setup (G4841)**, choose **Detail Spec. Over Titles**

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

For each record type that you use, you can specify how the information appears. You can also control the display format for these record types. For each record type that you set up, you can specify a format that is text only or a format that includes text and three columns. If you use the format for text and three columns, you must specify at least one of the column headings that you want to appear. The text-only format does not include headings. If you specify even one column heading for the record type, the record type changes to the format that includes text and three columns.

You can review record types, formats, and column headings by choosing **Record Types** from **Work Order Entry**.

38.4.1 Before You Begin

- Define work order record types. See [Chapter 36, "Set Up User Defined Codes"](#) for more information about defining work order record types.

To set up record types

On Detail Spec. Over Titles

Figure 38–3 *Detail Spec. Over Titles screen*



- Complete the following field:
 - Record Type
- To define column headings, complete the following fields:
 - Sub-Title 1
 - Sub-Title 2
 - Sub-Title 3

Field	Explanation
Record Type	The detail specification record type. Record types are user defined. You can set them up on the Detail Specification Types screen and use them to describe certain types of work order or engineering change order information.
Sub-Title 1	A subtitle, description, remark, name, or address. The text you type in this field appears as a column head on the Work Order Detail Entry screen for the record type indicated.

38.4.2 What You Should Know About

Topic	Discussion
Required record types	<p>You must set up the following record types for Equipment/Plant Maintenance:</p> <ul style="list-style-type: none"> ■ Maintenance Loops ■ Associated PMs <p>The record type that you set up for maintenance loops should coincide with the record type that you set up in equipment constants.</p> <p>See Section 15.4, "Creating a Maintenance Loop" for more information about maintenance loops.</p> <p>The record type you set up for associated PMs must be assigned to record type Z. This record type stores all associated service types to be performed on a work order.</p> <p>See Section 15.3, "Linking Service Types" for more information about associated PMs.</p>
Changing the format for a record type	<p>When you change the format of a record type, the system updates the format of that record type for all work orders.</p>

38.5 Setting Up the Work Order Life Cycle

You can set up rules that specify what statuses (steps) a work order must go through, such as work order entered, work order approved, and so on. You can also specify who can approve work orders. In addition, you can specify a currency amount, over which an approver must approve the work order.

Setting up the work order life cycle consists of the following tasks:

- Setting up work order activity rules
- Setting up work order approval routes
- Setting up work order approver profiles

38.5.1 Before You Begin

- Set up work order status codes. See [Chapter 36, "Set Up User Defined Codes"](#) for more information about setting up work order status codes.

38.5.2 Setting Up Work Order Activity Rules

Navigation

From **Equipment/Plant Management Setup (G1341)**, choose **Work Order Setup**

From **Work Order/Service Billing Setup (G4841)**, choose **Work Order Activity Rules**

You can set up work order activity rules that differ by work order document type and work order type. Document types are user defined codes that you use to specify how a document is processed by the general ledger. For example, you might define separate document types for PM work orders and corrective work orders. A work order type is a user defined code that you can use to classify work orders, such as maintenance work orders, model work orders, and so on. Use work order activity rules to:

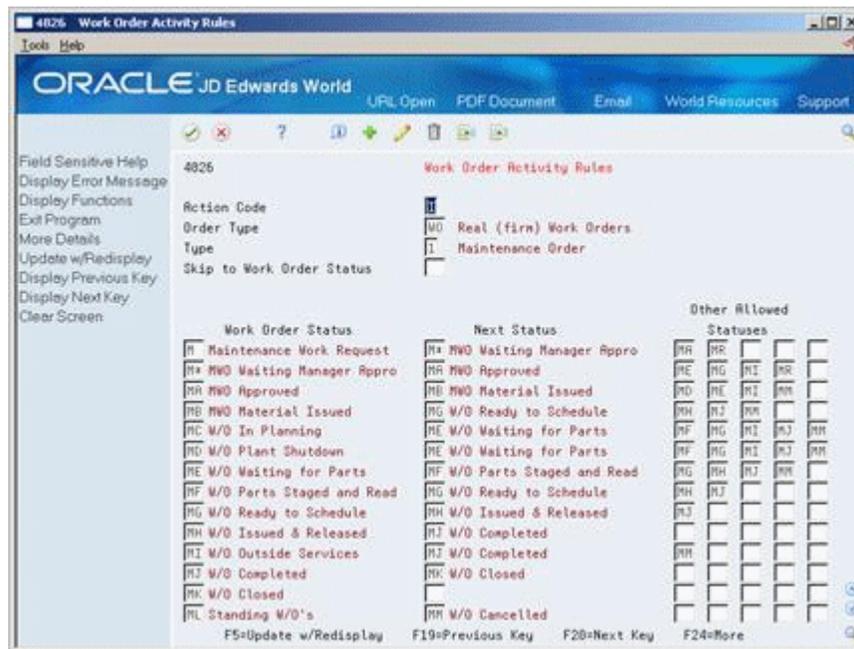
- Define the sequence of work order statuses at any point in the work order life cycle.

- Specify whether the work order is active or inactive at a particular status.
- Commit inventory at a particular status.
- Change the PM status when the work order changes status.
- Determine whether to update the capacity plan at a particular status.
- Determine whether a work order can be changed at a particular status.

38.5.3 To set up work order activity rules

On Work Order Activity Rules

Figure 38–4 Work Order Activity Rules screen

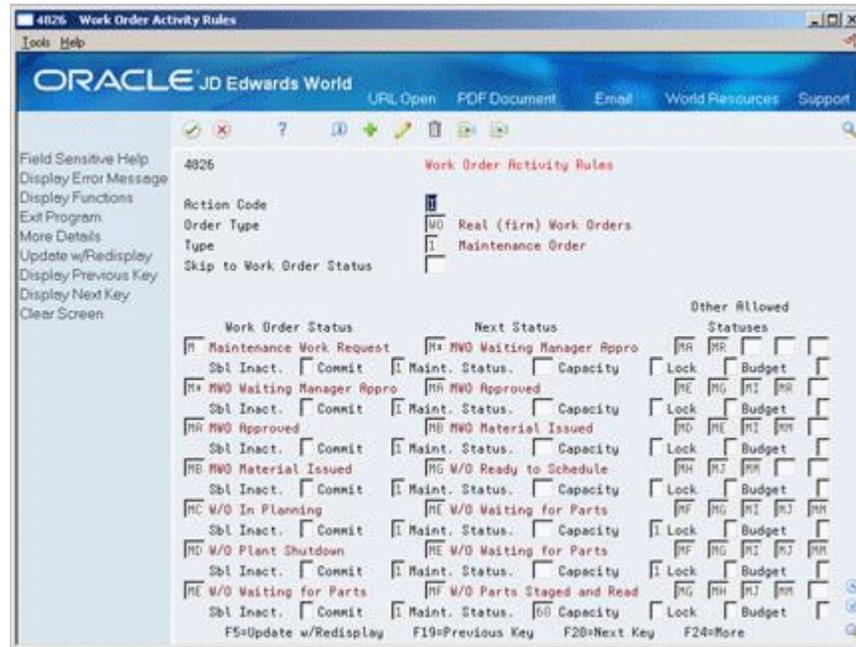


1. To locate a classification of work orders, complete the following fields:
 - Order Type
 - Type
2. To define the activity rules for that classification of work orders, complete the following fields:
 - Work Order Status
 - Next Status (optional)
 - Other Allowed Statuses (optional)

You must define a status code as a work order status in the work order activity rules table before you can use it as a next status or another allowed status.

3. Choose More Details.

Figure 38–5 Work Order Activity Rules screen



4. Complete the following optional fields:

- Subledger Inactive
- Commit Inventory
- Maintenance Status
- Capacity
- Lock

Field	Explanation
Order Type	<p>A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. JD Edwards World has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>The following document types are defined by JD Edwards World and should not be changed:</p> <ul style="list-style-type: none"> P – Accounts Payable documents R – Accounts Receivable documents T – Payroll documents I – Inventory documents O – Purchase Order Processing documents J – General Accounting/Joint Interest Billing documents S – Sales Order Processing documents <p><i>Form-specific information</i></p> <p>Enter the work order document type for which these rules apply.</p>

Field	Explanation
Type	<p>A user defined code (00/TY) that indicates the type classification of a work order or engineering change order.</p> <p>You can use work order type as a selection criteria for work order approvals.</p>
Skip to Work Order Status	<p>A user defined code (system 00, type SS) that describes the status of a work order.</p>
Next Status	<p>The next status for a work order, according to the work order activity rules, as the work order flows through the chain of approval.</p> <p>You must define a status code as a work order status in the Work Order Activity Rules table before you can use it as a next status.</p>
Sbl Inact	<p>A code that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive. Examples are jobs that are closed, employees that have been terminated, or assets that have been disposed. If a subledger becomes active again, set this field back to blank.</p> <p>If you want to use subledger information in the tables for reports but want to prevent transactions from posting to the master record, enter a value other than blank in this field.</p>
Commit	<p>A code that determines whether inventory is committed when the status of a work order changes. Values are:</p> <p>1 – Inventory is not committed.</p> <p>2 – Inventory is committed.</p>
Maint. Status	<p>A user defined code (12/MS) that indicates the maintenance status of a piece of equipment, such as 50 for maintenance due or 60 for waiting for parts.</p> <p>Note: Status code 98 is reserved for canceled maintenance. Status code 99 is reserved for completed maintenance. Status code 01, the default, is reserved for initial maintenance setup.</p>
Capacity	<p>The capacity flag determines whether the system runs the capacity plan generation when a work order changes status.</p> <p>Values are:</p> <p>blank – Do not run the capacity plan generation.</p> <p>1 – Run the capacity plan generation.</p> <p>2 – Run the capacity plan generation and provide a warning message when labor resources are over capacity.</p> <p>The warning message appears on the work order header and on Backlog Management when you inquire on the work order.</p>

Field	Explanation
Lock	<p>A code that determines whether a work order can be changed at a particular status. The lock applies to records in both the Work Order Master table (F4801) and the Work Order Instruction table (F4802). Values are:</p> <p>blank – Do not lock the work order.</p> <p>1 – Lock the work order.</p> <p>2 – Lock the work order with a completion date.</p> <p>3 – Do not lock the work order with a completion date.</p> <p>4 – Lock the work order with a parts list and routing.</p> <p>5 – Lock the work order with a completion date, parts list, and routing.</p> <p>6 – Lock the document type and the work order type.</p>

38.5.4 What You Should Know About

Topic	Discussion
Deleting status codes	You should not delete a status code from the activity rules table that another set of activity rules uses as a next status or another allowed status.

38.5.5 Setting Up Work Order Approval Routes

Navigation

From **Equipment/Plant Management Setup (G1341)**, choose **Work Order Setup**

From **Work Order/Service Billing Setup (G4841)**, choose **Work Order Approval Routing**

You can create a variety of approval routes for all the individuals who need to receive notification that a work order requires their approval.

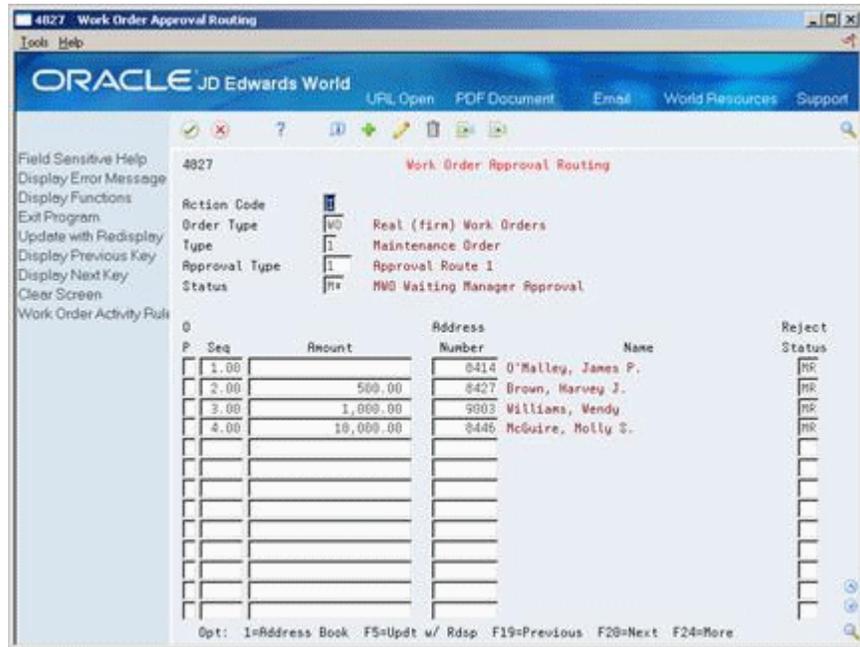
Use the address book number of the individual responsible for the approval of a work order to include them in an approval route. You can also establish specific approval routes based on:

- The type of work order document, such as actual work orders, planning work orders, and so on
- The classification of the work order, such as maintenance work orders, model work orders, and so on
- The status of a work order in the work order life cycle, such as waiting for parts, completed, and so on
- The amount of a work order

To set up work order approval routes

On **Work Order Approval Routing**

Figure 38–6 Work Order Approval Routing screen



1. Complete the following fields:
 - Order Type
 - Type
 - Approval Type
 - Status
 - Seq (Sequence)
 - Address Number
 - Reject Status
2. Complete the following optional field:
 - Amount

Field	Explanation
Approval Type	A user defined code (system 48, type AP) indicating the type of work order approval path that a work order follows. You can use processing options to specify a default approval type based on the type of work order.
Seq	A number that the system uses to sequence information. <i>Form-specific information</i> You can set up alternate approvers at any sequence. If you set up more than one approver at a sequence, only one of the approvers at that sequence needs to approve the work order.

Field	Explanation
Address Number	<p>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.</p> <p><i>Form-specific information</i></p> <p>Enter the address number of the person who can approve the work order.</p>
Reject Status	<p>The reject status is the status that the work order will default to if an approver rejects a work order.</p>
Amount	<p>A number that identifies the actual amount. Type debits with no sign or a plus sign (+). Type credits with a minus sign (-) either before or after the amount. You can use decimals, dollar signs, and commas. The system ignores non-significant symbols.</p> <p><i>Form-specific information</i></p> <p>The estimated amount on the work order over which the approver needs to approve the work order.</p>

38.5.6 What You Should Know About

Topic	Discussion
Substitute approvers	<p>You can set up multiple approvers at any approval sequence. Use this feature when there is a possibility that an approver might be unavailable at the time a work order reaches the approval stage, and another person must approve the work order.</p>

38.5.7 Setting Up Work Order Approver Profiles

Navigation

From Security Officer (G94), choose User Information

You must set up profiles for all of your designated work order approvers. The system uses the approver's address book number to send electronic mail messages associated with work approvals and to define the work order approval route.

When an approver enters a password to complete the approval process on Work Order Approval, the system validates the password against the approver's user ID number. The system uses the user ID number to verify that the address book number is valid for the approver.

To set up work order approver profiles

On User Information

Figure 38–7 User Information screen

The screenshot shows the 'User Information' screen for user '0092'. The interface includes a menu bar with 'Tools' and 'Help', and a toolbar with various icons. The main area is divided into sections for user identification, security, and system preferences. Fields are represented by text boxes and checkboxes. A 'Field Sensitive Help' menu is visible on the left side.

1. Locate a user by completing the following field:
 - User ID
2. Complete the following field:
 - Employee Address Number (PPAT)

38.6 Setting Up Work Order Supplemental Data

Navigation

From **Equipment/Plant Management Setup (G1341)**, choose **Work Order Setup**

From **Work Order/Service Billing Setup (G4841)**, choose **Define Your Own Data Types**

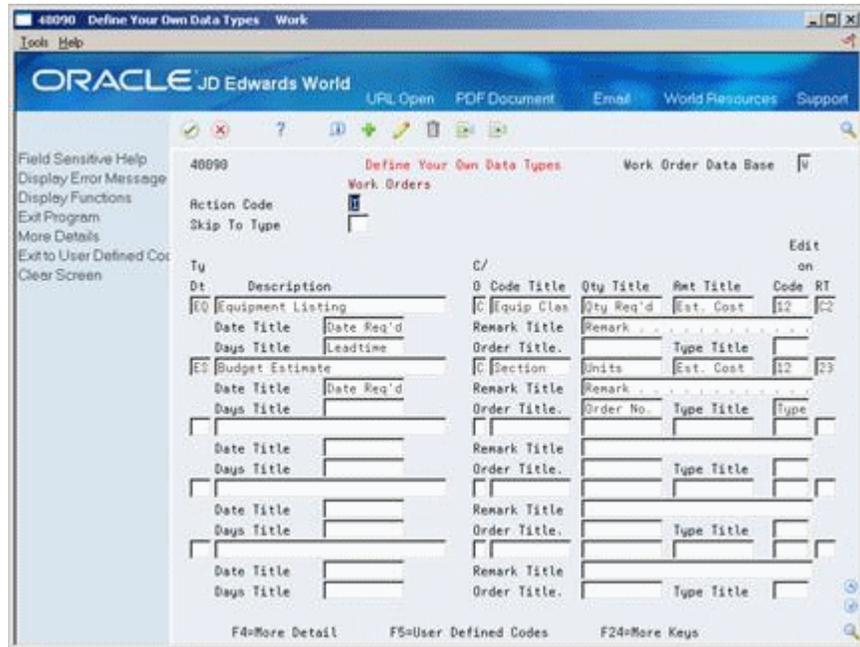
Use supplemental data to further define the work orders in your system. You can use supplemental data to report on and track work order details that are important to your company, but are not included in the work order master or record types. You can define as many types of supplemental data as you need.

You define and maintain supplemental data by work order database. Work order databases are user defined. For example, you might set up supplemental data for a database specific to maintenance work orders. The data types might include safety procedures, responsible personnel, and so on.

38.6.1 Before You Begin

- Set up the user defined codes table for the valid work order databases with which you want to associate supplemental data. See [Chapter 36, "Set Up User Defined Codes"](#).

Figure 38–9 Define Your Own Data Types screen (Details area)



5. Complete the following optional fields:

- Date Title
- Remark Title
- Days Title
- Order Title
- Type Title

Field	Explanation
Work Order Data Base	The code that represents what Work Order Data Base to use.
Ty Dt	User defined code (00/WT) that indicates the type of data being entered within the supplemental database. The code is often an abbreviation for the data it represents, for example, EC might represent Engineering Change.
C/O O	A code that determines the display mode for Supplemental Data. Valid codes are: C – Automatically takes you to the Data Entry program where you can enter code-specific information. The code values you enter can be edited against values in the User Defined Codes file (F0005). O – Automatically takes you to the Related Order Entry program, bypassing code-specific information. If you use an O, narrative text will not be tied to specific codes.
Code Title	The heading for a column on Supplemental Data Entry that relates to user defined codes. Enter the user defined codes for the supplemental data type in this column. For example, if the supplemental data type relates to the educational degrees of employees (BA, MBA, PHD, and so on), the heading could be Degree.

Field	Explanation
Qty Title	This code is used for the column heading of a User Defined Quantity to be tracked within the supplemental data. For example, if you want to keep track of Quantity to be Scrapped, a logical column heading would be Scrapped.
Amt Title	The heading for a column on Supplemental Data Entry that relates to an amount. This column contains statistical or measurable information. For example, if the data type relates to bid submittals, the heading could be Bid Amounts.
Code	A user defined code (98/SY) that identifies a JD Edwards World system.
RT	Identifies the table that contains user defined codes. The table is also referred to as a code type.
Date Title	The title of a supplemental data column heading for the Date field (EFT). For example, a possible column heading for the date field linked to the education data type might be Graduation.
Remark Title	The heading for a column on Supplemental Data Entry that relates to user defined codes. This heading describes the first Remark field on the data entry screen. It contains additional information and remarks. For example, if the data type relates to bid submittals, the heading could be Subcontractor.
Days Title	The title of a row heading you can use to describe the Date field (EFTE). For example, if you set up a record type for professional licenses, a possible row title for the date field might be Expires.
Order Title	The row heading that is used to describe the order field.
Type Title	The row heading that is used to describe the type field.

38.6.3 What You Should Know About

Topic	Discussion
Defining user defined codes as valid values for a data type	<p>You can set up your system to edit the values that you enter on supplemental data forms against the valid values you set up in user defined code tables. Use the following guidelines to define user defined codes as valid values for a data type:</p> <ul style="list-style-type: none"> ■ The user defined code table must be set up before you can set up the data type. ■ To assign a user defined code table to a data type, specify the install system and code type in the Edit on Code and Edit on RT fields. ■ If your supplemental data type does not relate to an existing user defined code, you can set up a new user defined code table. JD Edwards World recommends that you define the new tables for install systems 55 through 59. These systems are reserved for client use. User defined code tables that you create for these systems will not be modified during any reinstall processes. <p>See the <i>JD Edwards World Technical Foundation Guide</i> for more information about user defined codes.</p>

38.6.4 Processing Options

See [Section 57.4, "Work Order Data Base \(P48090\)"](#)

38.7 Setting Up Standard Parts Lists and Work Order Instructions

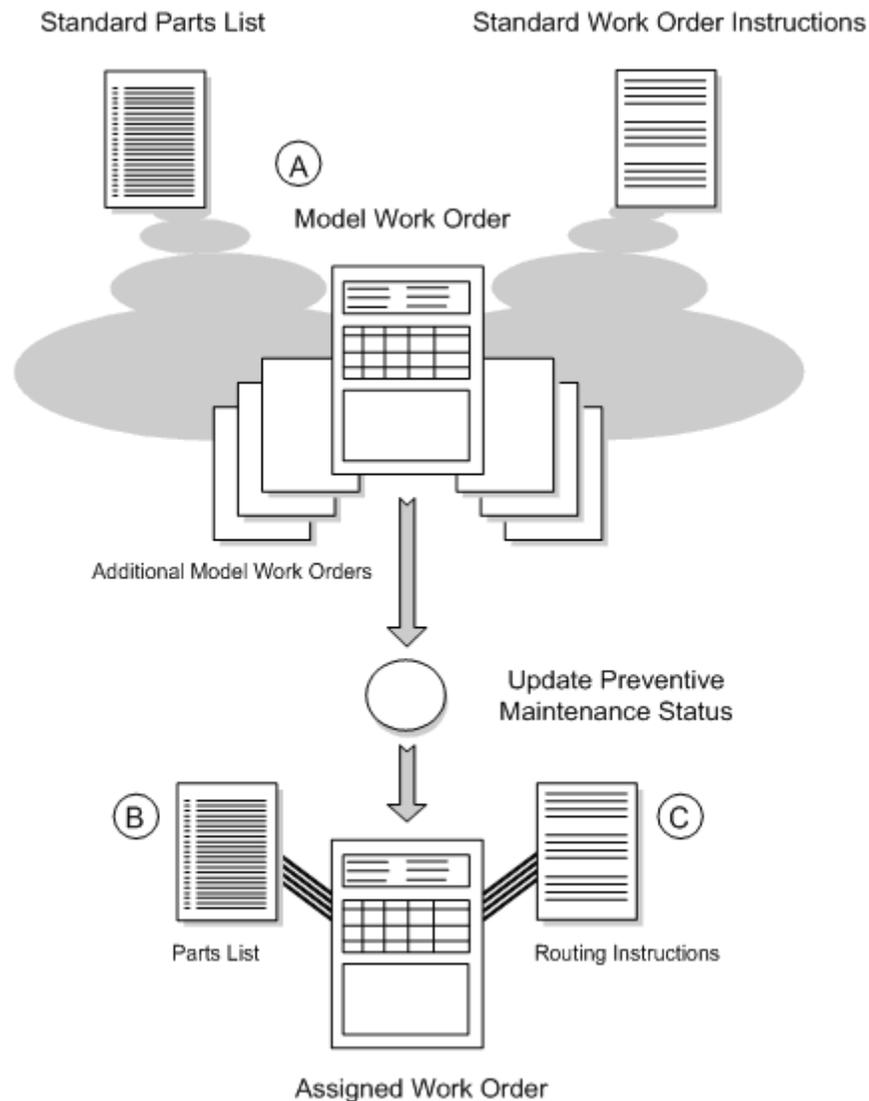
You can set up standard parts lists and standard work order instructions for work orders. You use a standard parts list when the maintenance task for which the work order applies is routine and repetitive, and for which you have advance knowledge of the parts requirements.

Work order instructions specify the sequence of operations required to complete a work order, as well as the work centers responsible for each operation. You use standard work order instructions when the maintenance task for which the work order applies is routine and repetitive, and for which you have advance knowledge of the labor requirements. To use standard work order instructions, you must set up work center information and information about the sequence of operations.

You can set up as many standard parts lists and standard work order instructions as you need. In addition, you can use a standard parts list or a version of standard work order instructions on as many work orders as you need. Typically, you assign standard parts lists and standard work order instructions to model work orders, but you can also use information from standard parts lists and standard work order instructions to create parts lists and routing instructions that you can attach to corrective work orders.

The following graphic shows how the system uses information from a standard parts list and standard work order instructions to generate a parts list and labor routing instructions for a work order that is assigned to a specific maintenance task.

Figure 38–10 *Generating a Parts List and Labor Routing Instructions for a Work Order Assigned to a Specific Maintenance Task*



- A - You can use standard parts lists and standard work order instructions for as many model work orders as you need.
- B - Parts information for the assigned work order comes from the model work order. The system copies the standard parts list that is attached to the assigned work order.
- C - Routing instructions for the assigned work order come from the model work order. The system copies the standard work order instructions to the routing instructions that are attached to the assigned work order.

Setting up standard parts lists and standard work order instructions consists of the following tasks:

- Revising processing options for parts lists and labor routings
- Setting up a standard parts list
- Setting up standard work order instructions

38.7.1 Revising Processing Options for Parts Lists and Labor Routings

From the DREAM Writer menu (G81), choose Versions List.

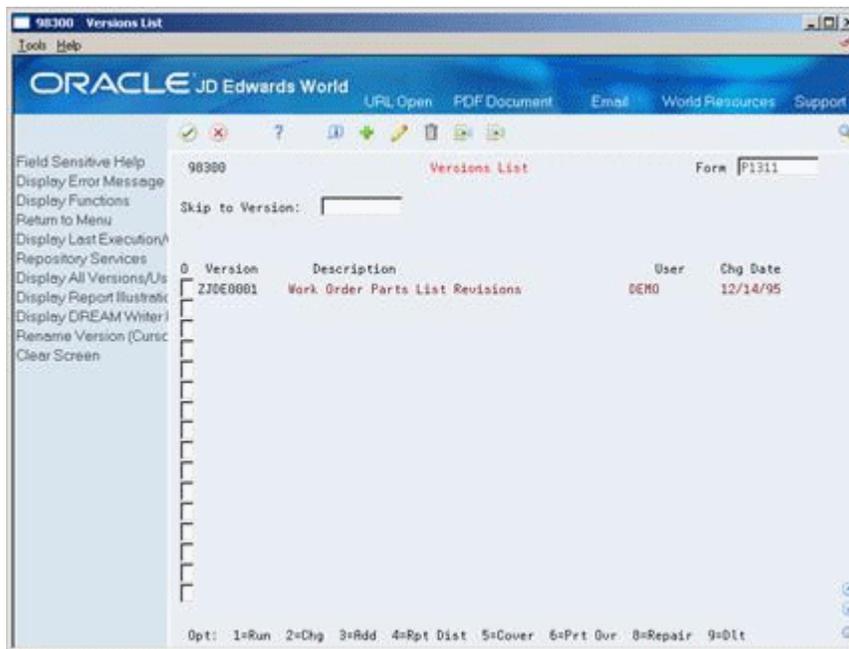
The system provides a variety of processing options when you assign parts lists and labor routings to a work order. You can specify when the system should create purchase orders for parts, whether to signal the user when a labor resource is over capacity, and so on. You can review the processing options for these programs and change them if necessary before you assign parts or labor routings to a work order.

Note: You can only access these processing options by following the procedures given below.

To revise processing options for parts lists and labor routings

On Versions List

Figure 38–11 Versions List screen



1. Complete the following field to access a list of DREAM Writer versions:
 - Form

Enter P1311 (Work Order Parts List Revisions) to view processing options for parts lists. Enter P1312 (Equipment Work Order Routings) to view processing options for labor routings.
2. Review the processing options and change them as necessary.

38.7.2 What You Should Know About

Topic	Discussion
Processing option security	You might not have authority to change processing options associated with parts and routings. See the <i>JD Edwards World Technical Foundation Guide</i> or your system security officer for more information about security issues.

38.7.3 Processing Options

See [Section 57.5, "Work Order Parts List Revisions \(P1311\)"](#)

See [Section 57.6, "Equipment WO Routings \(P1312\)"](#)

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about copying, changing, and running DREAM Writer versions

38.7.4 Setting Up a Standard Parts List

Navigation

From **Equipment/Plant Management Setup (G1341)**, choose **Planning**

From **Planning Setup (G1346)**, choose **Standard Parts List**

You can create standard parts lists that you can attach to work orders. This is especially useful when you have routine maintenance tasks that require identical parts.

For example, for a particular piece of equipment, you overhaul the hydraulic assembly every 250 hours. Because the overhaul procedure requires the same repair kit, you would set up a standard parts list that includes all of the parts necessary to overhaul the hydraulic assembly.

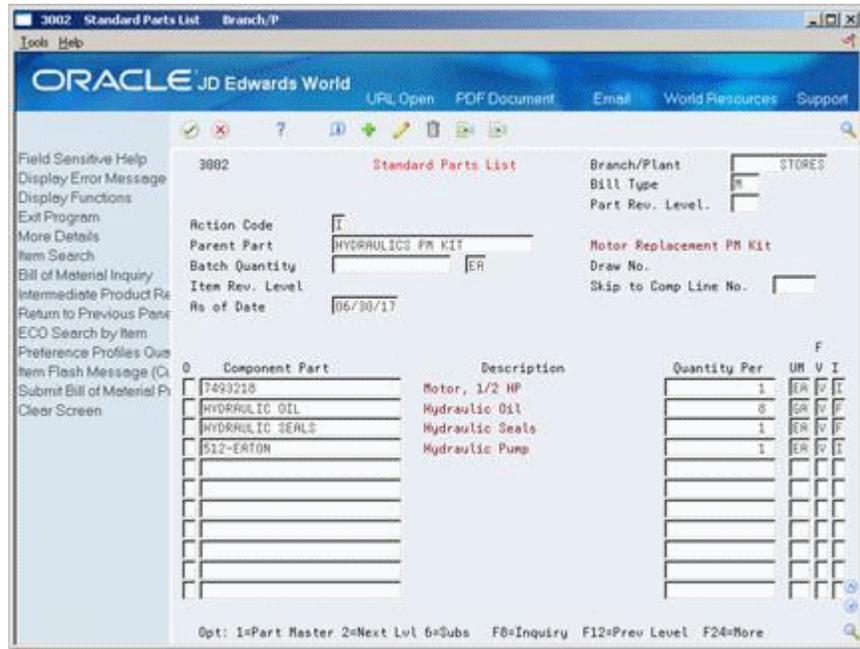
38.7.5 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to set up a standard parts list.
 - System 40: Inventory Base and Order Processing
 - System 41: Inventory Management
- Verify that inventory masters have been created for all parent items (part assemblies) and component items you want to include on a standard parts list. See *Entering Item Master Information in the JD Edwards World Inventory Management Guide* for more information about creating inventory master records.

To set up a standard parts list

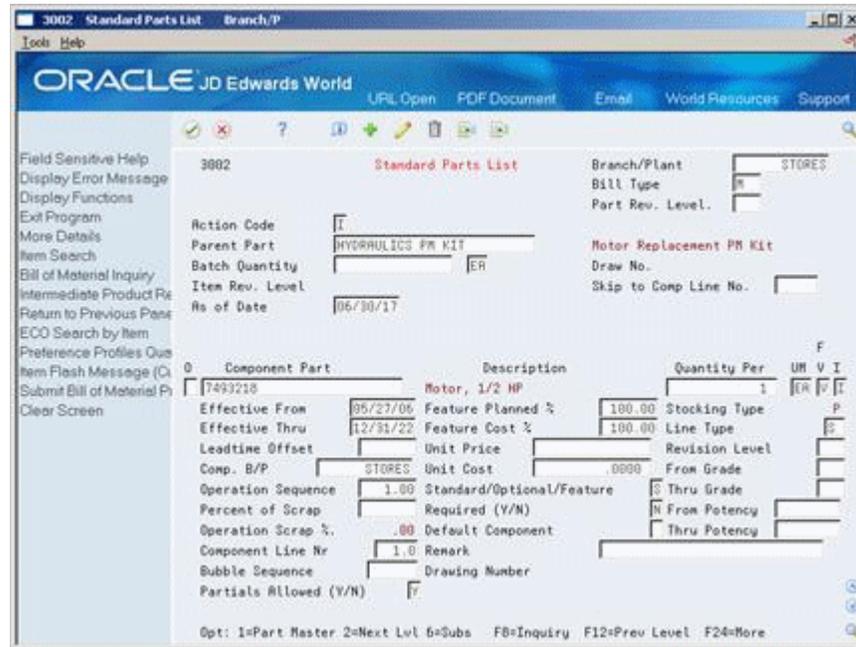
On Standard Parts List

Figure 38–12 Standard Parts List screen



1. Complete the following fields:
 - Branch/Plant
 - Parent Part
 - Component Part
 - Quantity Per
2. Complete any of the following optional fields:
 - Fixed or Variable
 - Bill Type
 - Item Revision Level
 - Batch Quantity
 - Unit Of Measure
 - Issue Type
3. Choose More Details.

Figure 38–13 Standard Parts List screen (Details area)



4. Complete any of the following fields:

- Effective From
- Effective Through
- Line Type
- Operation Sequence

Note: The following fields have no application within Equipment/Plant Maintenance: Feature Planned Percent, Feature Cost Percent, Grade From and Thru, Potency From and Thru

Field	Explanation
Parent Part	A number that the system assigns to an item. It can be in short, long, or 3rd item number format. <i>Form-specific information</i> Header: The Parent field contains the item number of the parent item. Detail: The Component Item field contains the item number of the component item.
Quantity Per	The number of units to which the system applies the transaction. <i>Form-specific information</i> A number that indicates how many components you use to manufacture the parent item. A quantity of zero is valid. The default value is 1.

Field	Explanation
F V	<p>Indicates if the quantity per assembly for an item on the bill of material varies according to the quantity of the parent item produced or is fixed regardless of the parent quantity. This value also determines if the component quantity is a percent of the parent quantity. Valid values are:</p> <p>F – Fixed Quantity</p> <p>V – Variable Quantity (Default)</p> <p>% – Quantities are expressed as a percentage and must total 100%</p> <p>For fixed quantity components, the Work Order and MRP systems do not extend the component's quantity per assembly value by the order quantity.</p> <p>For Process Manufacturing, the system stores percent components. Therefore, the system treats zero batch sizes like variable quantity components, and treats batch sizes greater than zero like fixed quantity components.</p>
Bill Type	<p>User defined code system 40, type TB, which designates the type of bill of material. You can define different types of bills of material for different uses. For example, you can differentiate between bills of material for maintenance and manufacturing.</p> <p>The system enters bill type M in the work order header when you create a work order, unless you specify another bill type. The system reads the bill type code on the work order header to know which bill of material to use to create the work order parts list. MRP uses the bill type code to identify the bill of material to use when it attaches MRP messages. Batch bills of material must be type M for shop floor control, product costing, and MRP processing.</p> <p><i>Form-specific information</i></p> <p>Type M is not required, but MRP uses it to explode component requirements for work orders without parts lists.</p> <p>Enter an asterisk (*) to display all bill types.</p> <p>This value defaults from the processing options for Enter/Change Bill (P3002).</p>
Part Rev. Level	<p>Indicates the revision level of a bill of material. It is usually used in conjunction with an engineering change notice or order (ECN or ECO). The revision level of the bill of material should match the revision level of its associated routing (data item RREV), although the system does not check this. This value is defined and maintained by the user.</p>
Batch Quantity	<p>This is the quantity of parts needed for the maintenance task.</p>

Field	Explanation
I	<p>A code that defines how the system issues each component in the bill of material from stock. In shop floor control, it indicates how the system issues a part to a work order. Valid codes are:</p> <ul style="list-style-type: none"> I – Manual issue (default) F – Floor stock (no issue) B – Backflush (when part is reported as complete) P – Preflush (when parts list is generated) U – Super backflush (at pay-point operation) S – Sub-contract item (send to supplier) Blank – Shippable end item <p>You can issue a component in more than one way within a specific branch/plant by using a different code on the bill of material and work order parts list. The bill of material code overrides the branch/plant value.</p>
Effective From	<p>A date that indicates one of the following:</p> <ul style="list-style-type: none"> ■ When a component part goes into effect on a bill of material ■ When a routing step goes into effect as a sequence on the routing for an item ■ When a rate schedule is in effect <p>The default is the current system date. You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in Product Costing, Shop Floor Control, and Capacity Requirements Planning. The Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.</p>
Effective Thru	<p>A date that indicates one of the following:</p> <ul style="list-style-type: none"> ■ When a component part is no longer in effect on a bill of material ■ When a routing step is no longer in effect as a sequence on the routing for an item ■ When a rate schedule is no longer active <p>The default is December 31 of the default year defined in the Data Dictionary for Century Change Year. You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in Product Costing, Shop Floor Control, and Capacity Requirements Planning.</p> <p>The Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.</p>

Field	Explanation
Line Type	<p>A code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces (General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management). It also specifies the conditions under which a line prints on reports and is included in calculations. Codes include:</p> <p>S – Stock item J – Job cost N – Non-stock item F – Freight T – Text information M – Miscellaneous charges and credits W – Work order</p> <p><i>Form-specific information</i></p> <p>The Branch/Plant table (F4102) supplies the default for this field.</p> <p>You can use line type T to display a text line on this screen in the sequence you define. The text does not display on review forms.</p>
Operation Sequence Number	<p>In routings, this number is used to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.</p> <p>In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Control system uses this field in the backflush/preflush by operation process.</p> <p>In engineering change orders, this number is used to sequence the assembly steps for the engineering change.</p> <p>Skip To fields allow you to enter an operation sequence that you want to begin the display of information.</p> <p>You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.</p> <p><i>Form-specific information</i></p> <p>JD Edwards World recommends that you do not use an operation number more than once within the same work center.</p>

38.7.6 Processing Options

See [Section 57.5, "Work Order Parts List Revisions \(P1311\)"](#)

38.7.7 Setting Up Standard Work Order Instructions

Navigation

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose Standard WO Instructions

You can create standard work order instructions that establish labor routing steps for work orders. For example, assume that you have created a standard parts list for routine hydraulic maintenance. The hydraulic maintenance has multiple steps that

must be performed in a specific sequence, such as machine lockout, disconnect motor, and so on. In addition, some of the steps must be performed by different work centers (crafts), such as electrical, mechanical, and so on. For this task, you would create standard work order instructions that specify the work centers and sequence of operations necessary to install the parts. You can then attach the instructions to each actual (firm) work order created for hydraulic maintenance.

38.7.8 Before You Begin

- Verify that you have purchased and installed the following systems. You must have installed these systems to be able to set up standard work order instructions.
 - System 40: Inventory Base and Order Processing
 - System 41: Inventory Management
- Verify that inventory masters have been created for all parent numbers specified in Standard Instructions. See *Entering Item Master Information in the JD Edwards World Inventory Management Guide* for more information about creating inventory master records.
- Verify that work centers have been set up as business units. See [Section 39.4.1, "Setting Up Resource Units"](#) for more information about setting up work centers as business units.

To set up standard work order instructions

On Standard WO Instructions

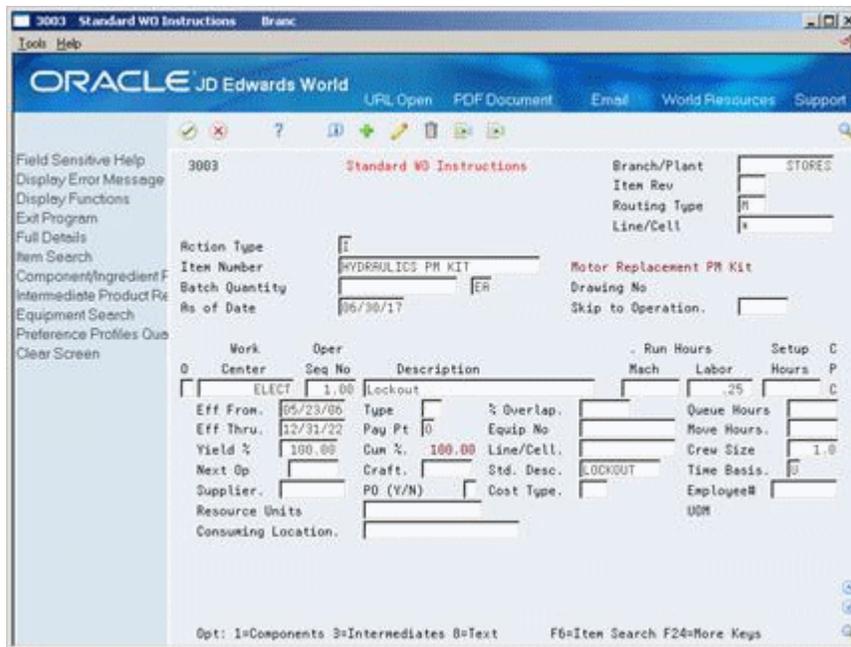
Figure 38–14 Standard WO Instructions screen

Work Center	Oper Seq No	Description	Run Hours Mach	Run Hours Labor	Setup Hours	P
ELECT	1.00	Lockout		.25		C
ELECT	2.00	Disconnect motor & dispose		.50		
MECH	3.00	Replace seals		1.00		
MECH	4.00	Fill hydraulic oil		.50		
ELECT	5.00	Install new motor		.50		
ELECT	6.00	Unlock		.25		

1. Complete the following fields:
 - Branch/Plant
 - Item Rev
 - Work Center (Resource)

- Oper Seq No (Operation Sequence Number)
 - Description
 - Run Hours - Labor
2. Complete the following optional fields:
 - Item Revision
 - Routing Type
 - Line/Cell
 - As of Date
 - Machine Hours
 3. Choose Full Details.

Figure 38–15 Standard WO Instructions screen



4. Complete the following field:
 - Time Basis

This field might already contain a default value.
5. Complete any of the following optional fields:
 - Eff (Effective) From
 - Eff Thru
 - Type (Operation)
 - % Overlap
 - Queue Hours
 - Equip No (for reference only)
 - Move Hours

- Supplier
- PO (Y/N)
- Cost Type
- Crew Size
- Next Op
- Craft
- Stnd Desc

Field	Explanation
Work Center	<p>An alphanumeric field 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, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p> <p><i>Form-specific information</i></p> <p>For Equipment users, this is the craft/resource responsible for completing the maintenance activity.</p>
Labor Run Hours	<p>This is the standard hours of labor expected in the normal production of this item.</p> <p>The run labor hours in the Routing Master table (F3003) are the total hours it takes the specified crew size to complete the operation. The hours are multiplied by the crew size during shop floor release and product costing.</p> <p><i>Form-specific information</i></p> <p>For Equipment/Plant, this is the estimated number of hours needed to complete a maintenance activity.</p>
Item Rev	<p>Indicates the revision level of a routing. It is usually used in conjunction with an engineering change notice or order (ECN or ECO). The revision level of the routing should match the revision level of its associated bill of material (data item BREV), although the system does not check this.</p> <p>This value is user defined and not maintained by the system.</p>
Routing Type	<p>User defined code (system 40, type TR) that designates the type of routing. You can define different types of routing instructions for different uses. For example, you can differentiate between equipment maintenance routings and manufacturing routings.</p> <p>You define the routing type on the work order header. The specific type of routing defined will then be used in the work order routing.</p>
Line/Cell	<p>Defines a production line or cell. Detailed work center operations can be defined inside the line or cell. For rate based manufacturing to use this value for reporting, this value must match the line cell in the header.</p>

Field	Explanation
As of Date	This field is used for effectivity checking. Enter a specific date to display documents (orders, bills of material, routings, as applicable) that are effective on or after that date. The current system date is the default, but you can enter any future or past date.
Mach Run Hours	This is the standard machine hours expected to be incurred in the normal production of this item.
Time Basis	<p>A user defined code (system 30, type TB) that identifies the time basis or rate to be used for labor hours entered for any routing step. You can set rates per unit, per 10, per 1000, and so on. For example, if the time basis code is 10, then the labor hours represents the number of hours to complete the routing step for 10 units. For Equipment/Plant Maintenance, the value you enter in this field is normally U (Unit).</p> <p>The system uses the values in the Description-2 field on the User Defined Codes screen for costing calculations. The Description field is a description of what the code represents, but is not used in calculations.</p>

38.7.9 What You Should Know About

Topic	Discussion
Entering machine hours	<p>Entering machine hours has several consequences that you should be aware of. If you are not using manufacturing systems, do not enter machine hours. If you are using manufacturing systems, the machine you specify must be set up as a work center.</p> <p>If you enter a value in the Machine Hours field, the system indicates a demand for those machine hours based on the time commitment of the work order. You should plan on taking the machine out of service for the entire time necessary to complete the work order. If you enter machine hours, you can optionally complete the Percent of Overlap field to indicate any operations that can overlap previous operations.</p> <p>For planning purposes, the system determines the total duration of the work order based on values you enter for machine hours and percent overlap.</p>

38.7.10 Processing Options

See [Section 57.7, "Routing Master Revisions \(P3003\)"](#)

38.8 Defining Default Location and Printers

Navigation

From Inventory System Setup (G4141), choose Default Location and Printers

Many of the forms within the Work Order Processing system require that you specify a location, such as a branch or plant, to which you are assigned. You can set up default locations for each person in your organization that uses the Work Order Processing system. A default location is the branch/plant that is assigned to your user ID or terminal ID. If you do not set up a default location for your user ID or terminal ID, you must enter a location manually.

You can also assign a default print queue to each person who uses the Work Order Processing system. When you print a work order, the system uses the default print queue that you set up, unless you specify otherwise. If you do not assign a default print queue, the system uses either the print queue assigned in the particular version for which the Work Order Print program applies or the print queue assigned to your user profile.

To define default location and printers

On Default Location and Printers

Figure 38–16 *Default Location & Printers screen*

The screenshot shows the 'Default Location & Printers' screen in Oracle JD Edwards World. The window title is '400951 Default Location & Printers'. The interface includes a menu bar with 'Tools' and 'Help', and a toolbar with various icons. The main area contains a form with the following fields:

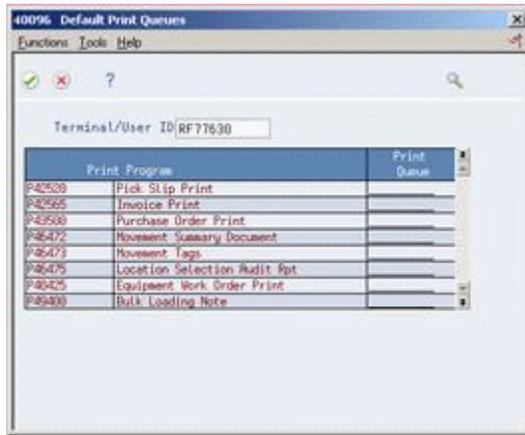
- Action Code: [Dropdown arrow]
- Skip to Terminal/User ID: [Text input field]

Below these fields is a table with three columns: Terminal/ User ID, Branch/Plant, and Approval Route Code. The table has 10 rows.

At the bottom of the screen, there are keyboard shortcuts: Opt: I=Print Queues and F24=More Keys.

1. Complete the following fields:
 - User ID
 - Branch or Plant
2. Choose Print Queues.

Figure 38–17 Default Print Queues screen



3. On Default Print Queues, locate Equipment Work Order Print.
4. Complete the following field:
 - Print Queue

Field	Explanation
Print Queue	<p>The waiting area a job goes to after it has processed. Output Queues are sometimes attached to printers. If an OUTQ is not specified, it defaults from the user's job description.</p> <p><i>Form-specific information</i></p> <p>The name of the print queue that you want the system to use for the adjacent document.</p>

38.8.1 What You Should Know About

Topic	Discussion
Approval routing	<p>The approval routing code on this screen refers to purchase orders only.</p> <p>See Section 38.5.5, "Setting Up Work Order Approval Routes" for more information about approval routing for work orders.</p>

38.9 Setting Up Supply and Demand Inclusion Rules

Navigation

From **Equipment/Plant Management Setup (G1341)**, choose **Planning**

From **Planning Setup (G1346)**, choose **Supply/Demand Inclusion Rules**

To balance your parts inventory with the demand for parts created by maintenance work orders, you must set up supply/demand inclusion rules. You use supply and demand inclusion rules to specify the documents that create a supply for parts, such as purchase requests, and the documents that create a demand for parts, such as PM work orders, corrective work orders, and so on. In addition, you specify the statuses at which the various documents create supplies or demands.

The following programs use supply and demand inclusion rules:

Program	Description
Materials Requirements Planning (MRP)	You can set up and apply different versions of the supply and demand inclusion rules, depending on the type of material plan that you run. For example, you can set up one version of the rules to apply to a long-range material plan and another version to apply to a short-range material plan.
Capacity Requirements Planning	You can set up and apply different versions of the supply and demand inclusion rules, depending on the type of capacity plan you run. For example, you can set up one version of the rules to apply to a long-range capacity plan and another version to apply to a short-range capacity plan.
Supply/Demand Inquiry	Based on the version of the supply and demand inclusion rules you choose, all of the documents that create a supply or demand for a particular part appear on Supply/Demand Inquiry. You can then access documents and make revisions to balance the supply with the demand.

In Equipment/Plant Maintenance, the following document types create a supply for parts:

- Purchase requests
- Purchase orders
- Blanket purchase orders

In Equipment/Plant Maintenance, the following document types create a demand for parts:

- System-generated maintenance work orders, such as PM work orders
- Corrective maintenance work orders

After you set up supply and demand inclusion rules, you can use the information that the system provides to balance the supply and demand for parts. For example, if demand is greater than supply at a given point, you can expedite purchase orders or postpone work orders.

When you review a version of the supply and demand inclusion rules, all document types and related statuses that are available appear. You choose the document types and document statuses that you want to include in the version.

38.9.1 Before You Begin

- Set processing options to include work order document types WO, WM, and any other work order document types that you have defined. See [Chapter 36, "Set Up User Defined Codes"](#) for more information about defining work order document types.

38.9.2 To set up supply and demand inclusion rules

On Supply/Demand Inclusion Rules

Figure 38–18 Supply/Demand Inclusion Rules screen



1. Complete the following field:
 - Inclusion Code
2. Choose Select Line for each document type and status for the inclusion rules to apply.

When you apply inclusion rules to work order documents, line types do not appear. Line types are not applicable to the Work Order system.

Field	Explanation
Inclusion Code	<p>A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows:</p> <ul style="list-style-type: none"> ■ For Manufacturing - Allows multiple versions of resource rules for running MPS, MRP, or DRP. ■ For Advanced Warehouse Management - Allows multiple versions of inclusion rules for running put away and picking. The system processes only those order lines that match the inclusion rule for a specified branch/plant.

Field	Explanation
Skip to Order Type	<p>A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. JD Edwards World has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>The following document types are defined by JD Edwards World and should not be changed:</p> <ul style="list-style-type: none"> P – Accounts Payable documents R – Accounts Receivable documents T – Payroll documents I – Inventory documents O – Purchase Order Processing documents J – General Accounting/Joint Interest Billing documents S – Sales Order Processing documents <p><i>Form-specific information</i></p> <p>If you are using the Skip to Order Type field, you can enter an order type code and press Enter to display only rules about that order type. To see the whole set of order types included in the resource rules, leave this field blank and use the Roll keys.</p>

38.9.3 Processing Options

See [Section 56.3, "Supply/Demand Inclusion Rules \(P34004\)"](#).

Set Up Maintenance Planning

This chapter contains these topics:

- [Section 39.1, "Setting Up Maintenance Planning"](#)
- [Section 39.2, "Setting Up General Planning"](#)
- [Section 39.3, "Setting Up Parts Planning"](#)
- [Section 39.4, "Setting Up Resource Planning"](#)

39.1 Setting Up Maintenance Planning

Before you can use maintenance planning features in Equipment/Plant Maintenance, you need to set up information that the system uses to process material plans and labor plans. This consists of:

Information	Description
General planning information	You set up general planning information for each branch or plant. General planning information determines how the system commits inventory to the branch or plant, which work days to include when you generate a material or capacity plan, how the system processes changes to standard parts lists, and so on.
Parts planning information	You set up parts planning information to determine how the system calculates the availability of parts. You also define the types of messages that appear when you generate a material plan. You can also set up different versions of the supply and demand inclusion rules, depending on the type of material plan that you want to generate.
Resource planning information	You set up resource planning information to determine how the system calculates the availability of labor resources, such as the number of employees at a work center, and the types of messages that appear when you generate a labor capacity plan. You can also set up different versions of the supply and demand inclusion rules, depending on the type of labor plan that you want to generate.

39.2 Setting Up General Planning

Before the system can generate material and labor plans and create planning messages, you must define general planning information for each branch or plant in your organization.

Setting up general planning consists of the following tasks:

- Setting up planning constants
- Setting up the workday calendar

39.2.1 Setting Up Planning Constants

Navigation

From **Equipment/Plant Management Setup (G1341)**, choose **Planning**

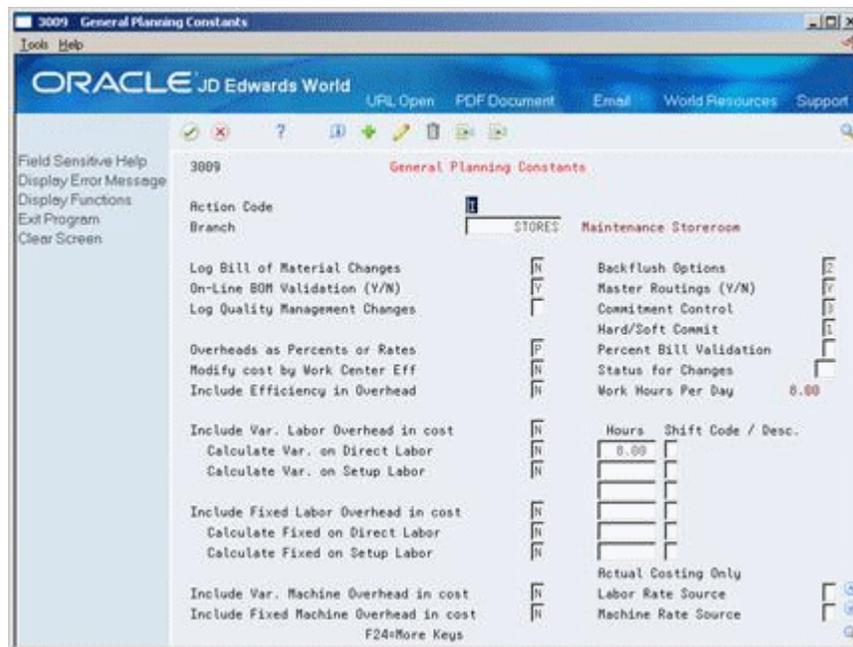
From **Planning Setup (G1346)**, choose **General Planning Constants**

You must define material and resource planning values for each branch or plant. For example, you can specify rules that govern how the system commits and routes inventory. You can also specify that the system log changes you make to standard parts lists if you need to track the changes. You can also define the number of hours per day that each branch or plant operates. The system uses this information to determine the maximum workload for each work center in a branch or plant.

To set up planning constants

On **General Planning Constants**

Figure 39–1 General Planning Constants screen



1. Complete the following fields:
 - Branch
 - Hard/Soft Commit
2. To specify the work hours per day, complete the following field:
 - Hours

Equipment/Plant users complete only one field under the Hours column to specify work hours per day. The remaining five fields must remain blank. After you set up the planning constants for a branch, the system calculates a value for work hours per day, based on the value you enter in the Hours field.

3. Verify that the Shift Code fields are blank
Shift codes are not applicable to Equipment/Plant Maintenance.
4. Complete the following optional fields:
 - Log Bill of Material Changes
 - On-Line BOM Validation (Y/N)

Field	Explanation
Hours	<p>The number of work hours that the manufacturing plant operates per day.</p> <p><i>Form-specific information</i></p> <p>For repetitive manufacturing, identify the number of work hours per shift for the specified branch. The Resource Generation program uses the corresponding shift hours to calculate the available resource units for each shift, and the total for the day.</p> <p>Since the shift hours may apply to different days of the week, the system uses the total of the first three hours to define the work hours per day value.</p>
Hard/Soft Commit	<p>Determines how the Shop Floor Control system commits inventory. Valid codes are:</p> <ol style="list-style-type: none"> 1. The system performs a hard commitment at the creation of the parts list. The hard commitment remains in effect until inventory is relieved. 2. The system performs a soft commitment at the creation of the parts list. Changed to a hard commitment during the pick list print process for the work order. The hard commitment remains in effect until inventory is relieved. 3. The system performs a soft commitment at creation of the parts list. The soft commitment remains in effect until inventory is relieved. <p>For World: When the hard/soft commit option is set to 2 or 3, any line item in the parts list may be hard committed prior to printing or relieving the inventory.</p> <p>Note: When you set the Commitment Method field in the Branch/Plant Constants screen to 2 or 3, you must use 1 or 2 for this field because a hard commitment must be performed.</p>
Log Bill of Material Changes	<p>This field determines whether changes to the bill of material are recorded in the Bill of Material Change table (F3011). Valid values are:</p> <p>Y – Yes, log changes.</p> <p>N – No, do not log changes.</p> <p>Blank will assume an N.</p> <p>When you log bill of material changes, the system saves the old bill of material and the new changed bill of material.</p>

Field	Explanation
On-Line BOM Validation (Y/N)	<p>Determines whether the system performs an online component/parent validation and low-level code assignment when you revise a bill of material.</p> <p>Valid values are:</p> <p>Y – Yes, validate items online.</p> <p>N – No, do not validate items online.</p> <p>Note: JD Edwards World recommends that you validate items online (enter Y) unless your bills of material are extremely large.</p> <p>Important: If you enter N, you must validate the items in batch. Run the Print Integrity Analysis program (P30601) after bill of material updates and before you run the Frozen Cost Update program (P30835) or perform a DRP/MPS/MRP generation (P3482).</p>

39.2.2 What You Should Know About

Topic	Discussion
Shared constants with manufacturing systems	Equipment/Plant Maintenance shares general planning constants with manufacturing systems. If you use manufacturing systems, you should set up different constants for maintenance branches or plants and manufacturing branches or plants.

39.2.3 Setting Up the Workday Calendar

Navigation

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose Work Day Calendar

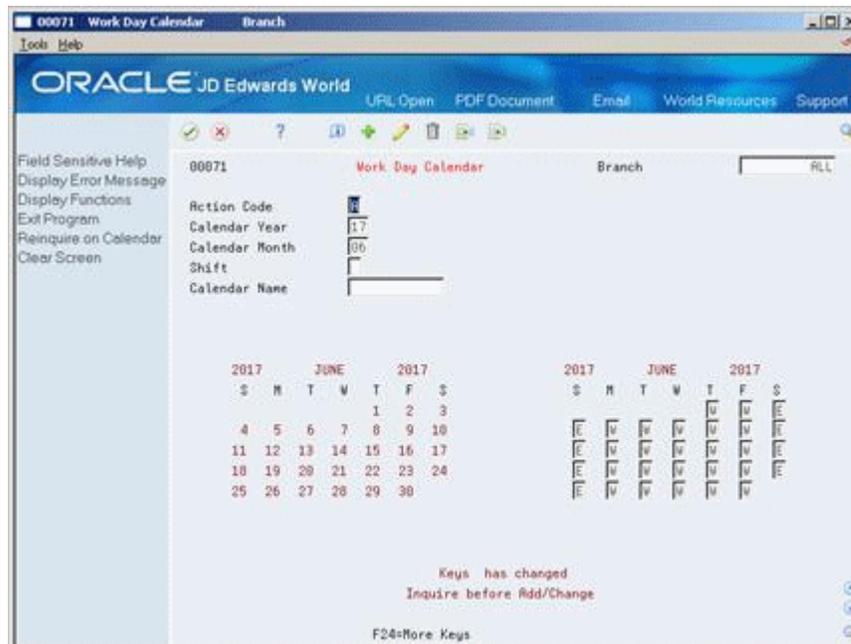
You must set up workday calendars for each maintenance branch or plant. You use the calendar to specify which days are workdays, holidays, and so on. You need to set up a workday calendar for every month for which you want to generate parts and labor plans. The system uses workday calendar information to plan and schedule labor resources, based on the workdays you specify. You should set up calendars six months to a year at a time.

When you initially set up a workday calendar, the system automatically specifies all weekdays as workdays and all Saturdays and Sundays as non-work days. You can accept these values or change the days to suit your business needs.

To set up the workday calendar

On Work Day Calendar

Figure 39–2 Work Day Calendar screen



1. Complete the following field:
 - Branch
2. Complete the following fields for the time period that you want to set up for the workday calendar:
 - Calendar Year
 - Calendar Month
3. Verify that the following fields are blank:
 - Shift
 - Calendar Name
4. For each day you want to set up, enter a valid day type on the entry calendar.

JD Edwards World provides several predefined day type codes (00/DT). With the exception of Workday (W), which is hard coded, you can use these, revise them, or add new ones. For more information about user defined codes, see the *JD Edwards World Technical Foundation Guide*.

Field	Explanation
Day - Type	<p>A user defined code (00/TD) that indicates the type of day, that is, how work should be scheduled. Examples are:</p> <p>W- Work Day</p> <p>E - Weekend</p> <p>H - Holiday</p> <p>M - Maternity Leave</p> <p>L - Leave of Absence</p> <p>With the exception of W, which is hard coded, you can use and revise these and add new codes.</p>

39.2.4 What You Should Know About

Topic	Discussion
Shift codes and calendar names	Shift codes and calendar names are not applicable to Equipment/Plant Maintenance.

39.3 Setting Up Parts Planning

Before you can generate and review a parts plan, you must set up information that the system uses to process the plan. For example, you must set up a table of user defined quantity types that the system uses to calculate and display the supply and demand of parts. You must also specify the action messages that you want to appear when the system detects a conflict between the availability and the demand for a part.

In addition, you can set up different versions of the supply and demand inclusion rules to accommodate different types of parts plans that you want to generate. For example, you can generate a long-range parts plan and a short-range parts plan. You use supply and demand inclusion rules to specify the document types that you want the system to include when it processes each plan.

Setting up parts planning consists of the following tasks:

- Setting up parts planning codes
- Setting up supply and demand inclusion rules for parts plans

39.3.1 Setting Up Parts Planning Codes

Before you can use the parts planning features in Equipment/Plant Maintenance, you must set up the following user defined codes:

- Quantity types
- MRP calculation display
- MRP action messages

The system uses these codes to calculate and display the availability of parts. The system also uses these codes to determine which action messages appear when it detects a conflict between the availability and the demand for a part.

See Also:

- [Section 36.1, "Setting Up User Defined Codes"](#) for additional guidelines on setting up user defined codes

Quantity Types

Navigation

From Equipment/Plant Management (G13), enter 29

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose Quantity Types

Quantity types are user defined codes (system 34, type QT) that represent the availability of parts. JD Edwards World provides several predefined codes, including the following:

- + Beginning available (unadjusted)

- + Beginning available
- + Purchase orders
- - Lot Expired
- - Firm work orders
- = Ending available (unadjusted)

The system uses codes that have unadjusted values to calculate part availability with the assumption that any outstanding action messages will not be implemented by the responsible planner. The system uses all other codes to calculate the availability of parts with the assumption that the planner will implement planning messages.

Caution: The table for quantity types is shared with the Manufacturing system. Under no circumstances should you delete this table. Values within this table have special meaning to the system, but you can change the description fields. JD Edwards World recommends that you leave this table unaltered.

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about maintaining user defined code tables

MRP Calculation Display

Navigation

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose MRP Calculation Display

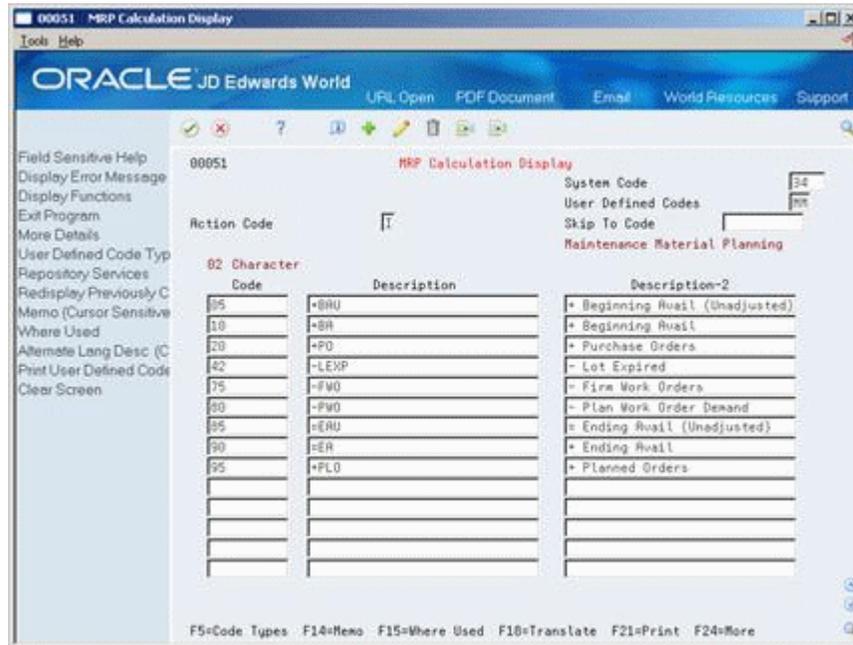
You must set up the MRP Calculation Display table (system 34, type MM) with the quantity type codes you want the system to consider when it calculates the availability of a part. You can revise the codes in this table to meet your specific calculation or display purposes.

For example, you can set up a table to specify that the system:

- Use the beginning available quantity for a part
- Add quantities from existing purchasing orders
- Subtract quantities from maintenance work orders
- Provide the ending available amount

Example: MRP Calculation Display Table

Figure 39–3 MRP Calculation Display screen



39.3.2 What You Should Know About

Topic	Discussion
Specifying a default MRP calculation display table	You can use processing options to specify which version of the MRP calculation display table the system uses. The maintenance material planning version of the MRP calculation display table appears unless you specify otherwise.

MRP Action Messages

Navigation

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose MPS/MRP Action Messages

You must define the action messages that you want to appear when the system notifies you of parts planning conflicts. For example, depending on the severity of a parts shortage, you can direct the system to provide messages to place an order for a part, expedite an existing order, increase the quantity of an existing order, and so on.

The system stores MRP action message codes in user defined codes (system 34, type MT). You can change the description of the codes to meet your business needs.

39.3.3 Setting Up Supply and Demand Inclusion Rules for Parts Plans

Navigation

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose Supply/Demand Inclusion Rules

You typically use the same version of supply and demand inclusion rules that you set up for work orders. However, you can set up other versions of the supply and demand inclusion rules to accommodate your parts planning needs. You use supply and demand inclusion rules to specify the documents that create a supply for parts, such as purchase requests, and the documents that create a demand for parts, such as work orders. In addition, you specify the statuses at which the various documents create supplies or demands.

When you generate a parts plan, the system considers only the documents you specify in the inclusion rules when it calculates parts availability. For example, you can set up a version of the supply and demand inclusion rules that includes all purchase orders, regardless of status, but only PM work orders up to and including a status of MC (work order in planning.)

Using this example, the system calculates supply according to parts for which any purchase orders exist. The system calculates demand according to the parts requirements of PM work orders whose statuses are within the range you specified. The system does not take into consideration parts requirements for work orders whose status you have not specified in the inclusion rules.

See Also:

- [Section 38.9, "Setting Up Supply and Demand Inclusion Rules"](#)

39.4 Setting Up Resource Planning

Before you can generate and review a labor plan, you must set up information that the system uses to process the plan. For example, you must set up the work centers that are responsible for maintenance and specify the number of employees in each maintenance work center. You must also set up additional user defined codes, such as the codes that the system uses to calculate the availability of labor resources.

In addition, you can set up different versions of the supply and demand inclusion rules to accommodate different types of labor plans that you want to generate. For example, you can generate a long-range labor plan and a short-range labor plan. You use supply and demand inclusion rules to specify the document types that you want the system to include when it processes each plan.

Setting up resource planning consists of the following tasks:

- Setting up resource units
- Setting up resource planning codes
- Setting up supply and demand inclusion rules for labor plans

39.4.1 Setting Up Resource Units

You must set up resource units to enable the system to calculate labor demands and labor costs for maintenance tasks. The system calculates resource units by multiplying the work hours per day by the number of employees in a work center. In Equipment/Plant Maintenance, a work center usually represents the employees who perform maintenance work, although it can also represent a department or a machine. You must set up your work centers before the system can calculate resource units and labor costs.

In addition, you must establish standard labor rates. The system uses standard labor rates to calculate rate information on work order labor routings and on the work order Estimate to Actual Variance program.

Setting up resource units consists of the following tasks:

- Setting up work centers
- Running the Resource Units Refresh program
- Setting up standard labor rates

39.4.2 Before You Begin

- Set up workday calendars for each branch or plant. See [Section 39.2.3, "Setting Up the Workday Calendar"](#)

Setting Up Work Centers

Navigation

From **Equipment/Plant Management Setup (G1341)**, choose **Planning**

From **Planning Setup (G1346)**, choose **Resource Revisions**

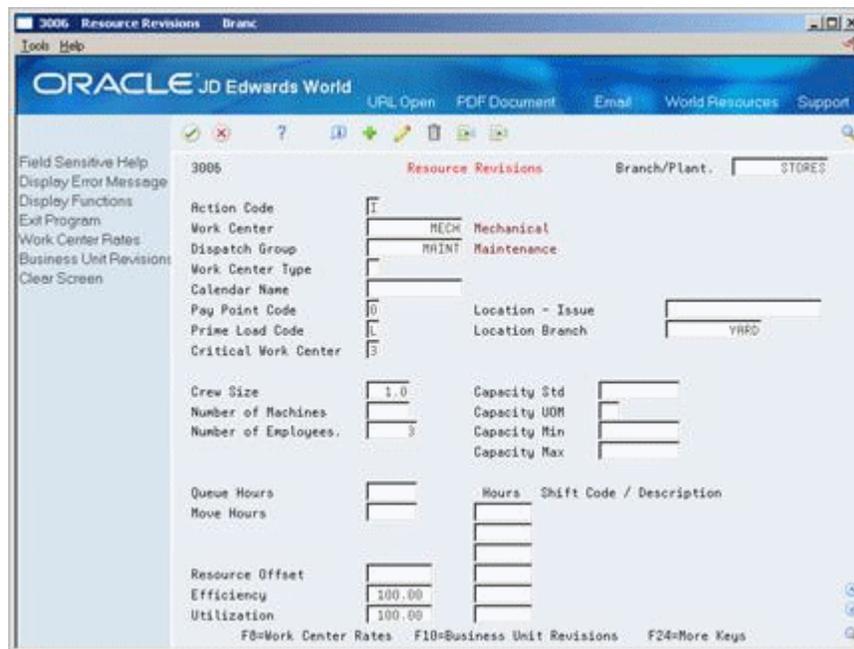
You must provide the system with the following types of information about each of your maintenance work centers:

- Basic information, such as work center names, crew sizes, job processing time, and so on
- Grouping information, so that you can combine similar work centers for planning and reporting
- Labor rate information

To set up work centers

On Resource Revisions

Figure 39–4 Resource Revisions screen



1. Complete the following fields:

- Branch/Plant
 - Work Center (a Business Unit)
 - Dispatch Group (a Business Unit)
 - Number of Employees
2. Verify that the following fields are blank:
 - Work Center Type
 - Calendar
 3. Complete the following optional fields:
 - Prime Load Code
 - Critical Work Center
 - Efficiency
 4. Choose Work Center Rates.

Figure 39–5 Work Center Rate Revisions screen

30061 Work Center Rate Revisions Branch

Tools Help

ORACLE JD Edwards World UPL Open PDF Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen

30061 Work Center Rate Revisions Branch/Plant. STORES

Action Code

Work Center MECH Mechanical

Cost Method 07 Standard

Dispatch Group MAINT Maintenance

	Simulated	Frozen
Direct Labor	20.00	20.00
Setup Labor		
Labor Var. Overhead		
Labor Fixed Overhead		
Machine Run		
Machine Var. O/H		
Machine Fixed O/H		

* Overhead values are shown as percents

F24=More Keys

5. On Work Center Rate Revisions, complete the following field:
 - Direct Labor-Simulated

Field	Explanation
Work Center	<p>An alphanumeric field 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, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p>
Dispatch Group	<p>A super category code to group work centers within an overall business unit. For example, you can group like machines operating out of several work centers that report to one business unit under a dispatch group.</p>
Branch/Plant	<p>A code that represents a high-level business unit. It can be used to reference a branch or plant that might have departments or jobs, which represent lower-level business units (data item MCU), subordinate to it. For example:</p> <ul style="list-style-type: none"> ■ Branch/Plant (MMCU) ■ Dept A (MCU) ■ Dept B (MCU) ■ Job 123 (MCU) <p>Business unit security is based on the higher-level business unit.</p>
Number of Employees	<p>This represents the normal number of employees in this work center. When you run the Work Center Resource Units Refresh program, the system multiplies this number by the Number of Work Hours Per Day from the Manufacturing Constants table (F3009) to generate the total gross labor hours available in the work center each day.</p>
Prime Load Code	<p>This value determines if a work center is machine or labor intensive. These codes are also used in Resource Requirements Planning and Capacity Requirements Planning calculations to develop load profiles.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> L – Run labor hours only M – Machine hours only B – Run labor plus setup labor hours C – Machine plus setup hours O – Other (will not generate resource units)

Field	Explanation
Critical Work Center	<p>A code that identifies the work center as critical or not critical when the system calculates capacity. Valid values are:</p> <p>N – Not a critical work center</p> <p>1 – A critical work center in calculating resource requirement planning only</p> <p>2 – A critical work center in calculating capacity requirements planning only</p> <p>3 – A critical work center in calculating resource requirements planning and capacity requirements planning</p> <p>4 – Not a capacity work center (will not be generated in capacity planning)</p> <p>Note: The system displays Type 3 work centers whenever type 1 or type 2 is selected in this field.</p>
Efficiency	<p>A user defined value that indicates how efficiently a work center operates. This value usually refers to people efficiency. When you enter a value in this field, and the Modify Cost by Work Center Efficiency field in the Job Shop Manufacturing Constants table (F3009) is set to Y, the system creates a new cost component (B4) from the cost calculated from the direct labor cost (B1). The system also uses this value to calculate rated capacity.</p> <p>Example: If the constant is set to Y, the value of this field is 80%, and the direct labor cost is 10, the system creates a B4 cost component for 2 in the Item Cost Component Add-Ons table (F30026).</p> <p>Enter percents as whole numbers, for example, enter 80% as 80.00.</p>
Direct Labor Simulated	<p>This rate, in cost per hour, is the rate used to calculate the current labor cost as of the last simulation and update.</p>

Running the Resource Units Refresh Program

Navigation

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose Resource Units Refresh

After you set up work centers on Resource Revisions and whenever you revise work center information, you must run the Resource Units Refresh program to calculate available resource units. You specify a time period and a branch or plant for which you want the system to calculate resource units. The system uses the Prime Load Code field on Resource Revisions to determine how to calculate the resource units that a work center is capable of generating over a particular period of time. To calculate resource units for maintenance work centers, you typically use a prime load code of L for labor hours.

If you use a prime load code of L, the system calculates resource units using the following information:

- Number of employees from Resource Revisions
- Work hours per day from General Planning Constants

When you run the Resource Units Refresh program, a versions list appears. The versions list contains DEMO versions that you can run, or copy and modify to suit

your needs. When you run a version, the system displays Processing Options Revisions before submitting the job for processing.

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about running, copying, and changing a DREAM Writer version

39.4.3 Processing Options

See [Section 56.13, "Work Center Resource Units Refresh \(P3007G\)"](#)

Setting Up Standard Labor Rates

Navigation

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose Standard Cost Update

When you set up work centers, you enter a value for simulated labor rates on Work Center Rates Revisions. You must run the Standard Cost Update program to create the frozen direct labor rate. The system uses the frozen direct labor rate to calculate the estimated labor routing costs to work orders.

When you run Standard Cost Update, the system submits the job directly to batch.

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about running, copying, and changing a DREAM Writer version

39.4.4 Processing Options

See [Section 57.8, "Item Cost Update \(P30835\)"](#)

39.4.5 Setting Up Resource Planning Codes

Before you can use the labor planning features in Equipment/Plant Maintenance, you must set up the following user defined codes:

- CRP display
- Message types

The system uses these codes to calculate and display labor availability when you generate a labor plan. The system also uses these codes to determine which action messages appear when it detects a conflict between the availability of labor resources and demand for labor resources.

See Also:

- [Chapter 36, "Set Up User Defined Codes"](#) for additional guidelines on setting up user defined codes

CRP Display

You must set up the CRP Display table (system 33, type MM) with the codes that you want to appear on Capacity Load. The system provides several predefined codes, such as:

- 10 - Released Load

- 40 - Load Versus Capacity
- 80 - Available Capacity
- 90 - Accumulated Available Capacity

You can use these codes or modify them to meet your specific calculation or display purposes.

Message Types

You use message type codes (system 33, type MM) to define the action messages that you want to appear when the system notifies you of load and capacity conflicts. For example, you can define messages that indicate an over-capacity condition, an under-capacity condition, and so on.

39.4.6 Setting Up Supply and Demand Inclusion Rules for Labor Plans

Navigation

From Equipment/Plant Management Setup (G1341), choose Planning

From Planning Setup (G1346), choose Supply/Demand Inclusion Rules

You typically use the same version of supply and demand inclusion rules that you set up for work orders. However, you can set up other versions of the supply and demand inclusion rules to accommodate your labor planning needs. You use supply and demand inclusion rules to specify what type of work orders and range of work order statuses you want the system to include when it calculates available labor resources.

For example, you can set up a version of the supply and demand inclusion rules that includes only PM work orders up to and including a status of MC (work order in planning).

See Also:

- [Section 38.9, "Setting Up Supply and Demand Inclusion Rules"](#)

Part VI

Advanced & Technical

This part contains these chapters:

- Chapter 40, "Equipment/Plant Maintenance Global Updates"
- Chapter 41, "Update Equipment Information"
- Chapter 42, "Update Work Order Information"
- Chapter 43, "Update PM Schedule Information"
- Chapter 44, "Update Accounts and Ledgers"
- Chapter 45, "Data Purge and Archival"
- Chapter 46, "Purge Work Orders"
- Chapter 47, "Purge Selected Equipment Information"
- Chapter 48, "Equipment/Plant Maintenance Reports"
- Chapter 49, "Print Equipment Reports"
- Chapter 50, "Print Cost Reports"
- Chapter 51, "Print Work Order Reports"
- Chapter 52, "Print Maintenance Planning Reports"

Equipment/Plant Maintenance Global Updates

This chapter contains these topics:

- [Section 40.1, "Objectives"](#)
- [Section 40.2, "About Equipment/Plant Maintenance Global Updates"](#)

40.1 Objectives

- To make system-wide updates to:
 - · Equipment information
 - · Work order information
 - · PM schedule information
 - · Accounts and ledgers
- To identify the purpose for each global update program
- To determine when to use each global update program

40.2 About Equipment/Plant Maintenance Global Updates

Use global update programs to make system-wide changes that affect a variety of information within Equipment/Plant Maintenance. For example, you can:

- Update tickler dates in the message log
- Update the search word table when you add new equipment
- Create PM schedules for groups of similar equipment
- Make additions or changes to groups of related PM schedules, such as:
 - · Schedule dates
 - · Service intervals
 - · Priorities
- Update maintenance and work order tables when you revise equipment numbers on the equipment master
- Recalculate work order costs to reflect actual time spent on each maintenance task
- Update all work orders and equipment masters when you revise parts lists
- Update all affected G/L transactions when you revise work order phase codes or equipment numbers

- Update equipment tables when you revise numbers in your chart of accounts
- Restore account balance information if your account balance data is corrupted
- Update the Account Ledger table (F0911) when you change the symbol that you use to identify equipment numbers

Equipment/Plant Maintenance global updates consist of the following tasks:

- Updating equipment information
- Updating work order information
- Updating PM schedule information
- Updating accounts and ledgers

Update Equipment Information

This chapter contains these topics:

- [Section 41.1, "Updating Equipment Information"](#)
- [Section 41.2, "Updating the Message Log"](#)
- [Section 41.3, "Updating the Search Word Table"](#)

41.1 Updating Equipment Information

You can update certain equipment information globally to reduce the amount of processing time it takes to maintain current equipment information in your system and throughout your organization.

41.2 Updating the Message Log

Navigation

From **Equipment/Plant Management (G13)**, enter 27

From **Advanced Operations (G1331)**, choose **Update Message Log**

Run the Update Message Log program to keep tickler dates and units current in the message log. For example, if you set up a reminder message to appear at 3,000 miles for a piece of equipment, you use this update to ensure that the message appears when the equipment reaches the 3,000-mile mark.

The Update Message Log program compares tickler dates with the system date and tickler units (for example, miles or hours) to the current unit reading that you record for the corresponding piece of equipment. The program updates all the units that have reached or exceeded the tickler amounts that you post in the AT00 automatic accounting instruction. When the update is complete, the corresponding equipment number on Equipment Search is highlighted to indicate that a message exists for the equipment.

Note: You should run this program only if you use the Tickler Miles/Hours field in the message log.

When you select Update Message Log, the system submits the job directly to batch. You should update the message log frequently to keep message tickler units current. JD Edwards World recommends running Update Message Log as part of your unattended operations.

See Also:

- [Section 6.1, "Working with Message Logs"](#) for more information about using tickler dates and units
- *JD Edwards World Technical Foundation Guide* for more information about running unattended operations (SLEEPER)

41.3 Updating the Search Word Table

Navigation

From Equipment/Plant Management (G13), enter 27

From Advanced Operations (G1331), choose Build Search Word Table

You must build a search word table before you can perform a query search for equipment. For example, you might perform a query search if you need to locate the equipment master for a piece of equipment, but you do not know the equipment number. The search word table consists of possible words that you might use on a search screen to access equipment information that you need.

The Build Search Word File program scans your equipment information and creates a table of all the words found in the following places:

- Item Master table (F1201):
 - · Equipment description fields
 - · Any remark fields
 - · Model number
 - · Authorization for expenditure (AFE) number
 - · All category code fields
- Supplemental Data tables (F12090, F12092, and F12093):
 - · User defined codes
 - · Remark fields
 - · Narrative text

When you select Build Search Word File, the system submits the job directly to batch. You should run this update to maintain and refresh the Search Word table as you add, change, and delete equipment in your system. JD Edwards World recommends running this program as part of your unattended operations.

41.3.1 What You Should Know About

Topic	Discussion
Using uppercase and lowercase descriptions for equipment	The Build Search Word File program is not case sensitive. The system locates and retrieves words in the description fields for equipment regardless of whether they are upper- or lowercase.

See Also:

- [Section 5.1, "Searching for Equipment Information"](#) for more information about performing a query search to locate equipment
- *JD Edwards World Technical Foundation Guide* for more information about running unattended operations (SLEEPER)

Update Work Order Information

This chapter contains these topics:

- [Section 42.1, "Updating Work Order Information"](#)
- [Section 42.2, "Updating Work Order Cost"](#)
- [Section 42.3, "Updating Work Order Status Based on Purchase Order Receipt"](#)
- [Section 42.4, "Updating the Standard Parts List"](#)
- [Section 42.5, "Updating the Phase or Equipment Number in the G/L"](#)

42.1 Updating Work Order Information

You can update certain work order information globally to reduce the amount of processing time it takes to maintain current information throughout your organization.

42.2 Updating Work Order Cost

Navigation

From **Equipment/Plant Management (G13)**, enter 27

From **Advanced Operations (G1331)**, choose **Update Work Order Cost**

Run the Update Work Order Cost program to replace the actual hours in the Work Order Routing table (F3112) with the total hours for each operation sequence from the Payroll Transaction History table. The program also reads the Account Ledger table for material and subcontract amounts. The program then updates the following information in the Work Order Master table:

- Actual labor costs
- Actual material costs
- Actual hours
- Actual amount
- Actual other costs
- Actual duration (downtime hours)

42.3 Updating Work Order Status Based on Purchase Order Receipt

Navigation

From **Equipment/Plant Management (G13)**, enter 27

From **Advanced Operations (G1331)**, choose **Update Work Order Status/PO Receipt**

You can update the status of work orders based on whether parts ordered from associated purchase orders have been received. This is especially useful to schedule work orders based on the arrival of ordered parts. You can specify the status that the system updates work orders based on both partial and full receipt of the items on the associated purchase order. You can also specify the recipient of an e-mail message informing of the change in work order status.

When you choose **Update Work Order Status/PO Receipt**, a versions list appears. The versions list contains a DEMO version that you can run, or copy and modify to suit your needs. When you run a version, **Processing Options Revisions** appears before the system submits the job for processing.

42.3.1 Processing Options

See [Section 58.1, "Update Work Order Status based on Purchase Order Receipt \(P48810\)"](#).

42.4 Updating the Standard Parts List

When you change a work order parts list, you can update the **Bill of Materials Master table (F3002)** to ensure that all future work orders that use the same standard parts list reflect the change.

When you add a part to a work order parts list, the **Update Standard Parts List** program adds the part to the standard parts list. When you change the quantity of a part on the work order parts list, the program updates the quantity on the standard parts list.

42.4.1 What You Should Know About

Topic	Discussion
Updating parts quantities	The Update the Standard Parts List program compares the transaction quantity on the work order part to the quantity indicated on the standard parts list when it updates the standard parts list.
Updating the equipment parts list	You can use the Update the Standard Parts List program to update the equipment parts list. The update program works the same way as for the standard parts list, except that it updates the standard parts list from the Equipment Master table (F1201) instead of the Work Order Master table (F4801) .

42.4.2 Processing Options

See [Section 58.2, "Standard Parts List Update \(P13802\)"](#)

42.5 Updating the Phase or Equipment Number in the G/L

Navigation

From Equipment/Plant Management (G13), enter 27

From Advanced Operations (G1331), choose Update Phase/Equipment Number in the G/L

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

When you choose Update Phase/Equipment Number in the General Ledger, the system submits the job directly to batch processing.

42.5.1 Before You Begin

- Back up the Work Order Master table (F4801)
- Verify that no one accesses the Work Order Master table while you run this procedure

Update PM Schedule Information

This chapter contains these topics:

- [Section 43.1, "Updating PM Schedule Information"](#)
- [Section 43.2, "Updating PM Schedules"](#)
- [Section 43.3, "Updating Equipment Numbers"](#)

43.1 Updating PM Schedule Information

You can update PM schedule information to:

- Create PM schedules for similar equipment
- Make global changes to PM service types
- Reflect changes you make to equipment numbers throughout your maintenance operation

43.2 Updating PM Schedules

Navigation

From **Equipment/Plant Management (G13)**, enter **27**

From **Advanced Operations (G1331)**, choose **Global PM Schedule Update**

You can globally add, change, or delete PM schedules. You specify the service type that you want to change and enter information about the equipment for which you want the changes to apply.

You can also make global revisions to a group of PM service types. You narrow the equipment for which you want the revisions to apply by using any combination of the first ten equipment category codes. For example, for any service type, you can:

- Change the service interval
- Revise the schedule date
- Revise the maintenance priority
- Revise the procedure number
- Assign a different model work order number
- Revise the value in the Occurrences field
- Revise the frequency indicator

- Revise the multiple work order code

You can also globally create PM schedules for multiple pieces of equipment that you place in service whose maintenance requirements are similar.

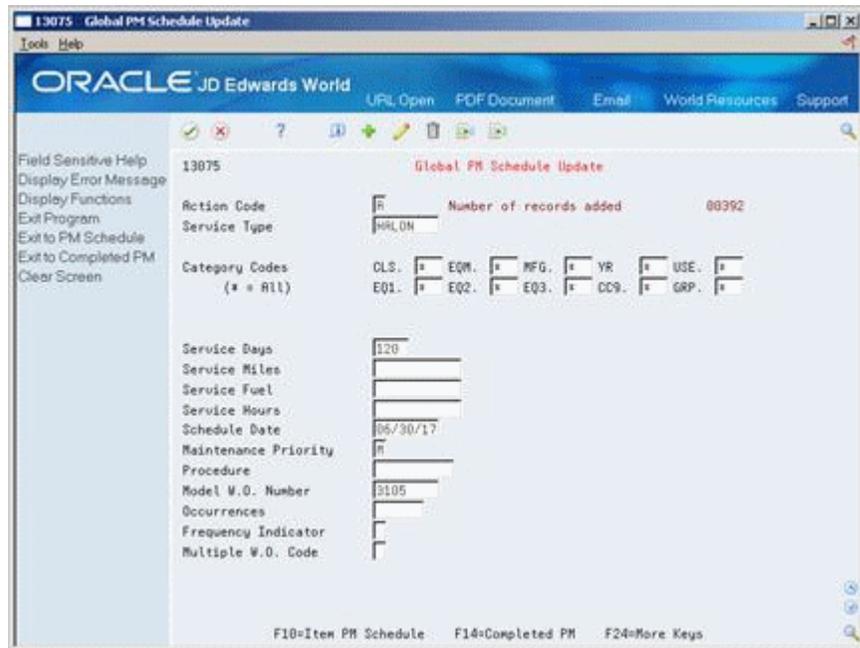
The Global PM Schedule Update program immediately updates the Maintenance Schedule table (F1207) depending on the information that you change. Consider the following guidelines when you update PM schedule information:

- If you enter a schedule date, the system removes all other meter service intervals.
- If you enter a meter service interval, the system removes the schedule date.
- If you enter a schedule date and a frequency indicator, the system removes any existing service days.
- If you enter a schedule date and service days, the system removes the existing frequency indicator.

To update PM schedules

On Global PM Schedule Update

Figure 43–1 Global PM Schedule Update screen



1. To locate the service type and equipment that you want to update, complete the following fields:
 - Service Type
 - Category Codes 01 - 10
2. To change the service type, complete any of the following fields:
 - Service Days
 - Service Miles
 - Service Fuel
 - Service Hours

- Schedule Date
- Maintenance Priority
- Procedure
- Model W.O. Number
- Occurrences
- Frequency Indicator
- Multiple W.O. Code

A message appears that prompts you to enter a value.

3. Type Y to complete the update or N to cancel the update.

43.2.1 What You Should Know About

Topic	Discussion
Reviewing equipment that is affected by the update	<p>Choose Completed PM to review the equipment that is affected by the changes you specify on Global PM Schedule Update.</p> <p>Note: Make this selection after the system displays the update message but before you enter your response.</p>
Creating PM schedules for multiple pieces of equipment	<p>You can create PM schedules for multiple pieces of equipment by using Global PM Schedule Update. This is particularly useful when you set up your system initially or when you add multiple pieces of identical equipment to your operation. You create a PM schedule globally by assigning a service type to equipment that matches specific selection criteria. You use the first ten equipment category codes to select the equipment for which the PM schedule applies.</p> <p>Caution: When you create PM schedules globally, the system updates the PM schedules for all equipment that matches the equipment category codes that you specify. If you are uncertain whether creating PM schedules globally will effect equipment for which you have previously created PM schedules, and you do not want the new PM information to apply, you should not use Global PM Schedule Update. Instead, create individual PM schedules using Item PM Schedule.</p> <p>See Section 14.3.1, "Creating PM Schedules for Each Piece of Equipment" for more information.</p>

43.3 Updating Equipment Numbers

Navigation

From Equipment/Plant Management (G13), enter 27

From Advanced Operations (G1331), choose Update Unit/Serial Number from F1201

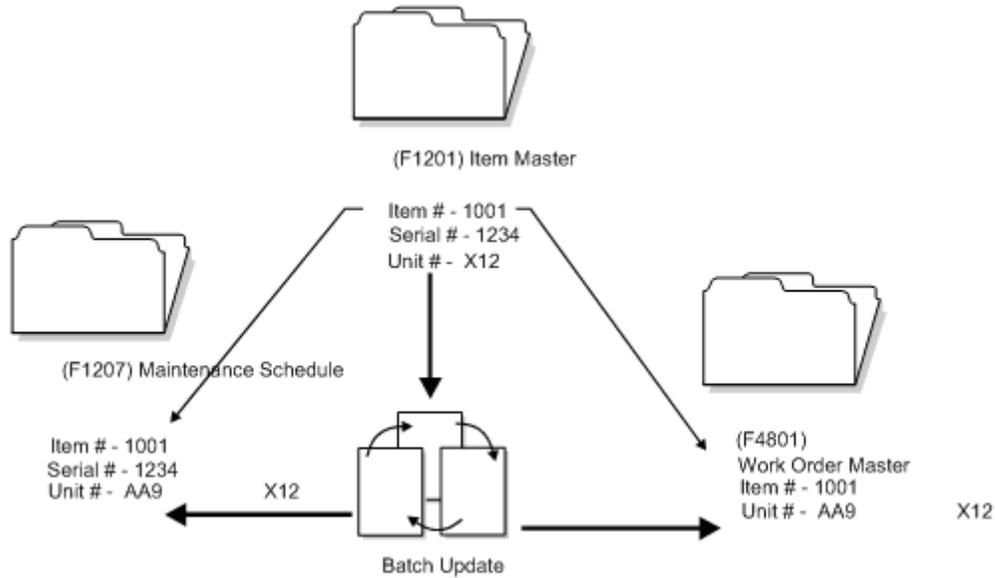
If you change the unit number or serial number for a piece of equipment, the system updates only the equipment master in the Item Master table (F1201). The system does not automatically update other tables that store equipment numbers.

If you change a unit or serial number in the Item Master table, you must run the Update Unit/Serial Number from F1201 program to update the numbers in the following tables:

- Maintenance Schedule (F1207)
- Meter Reading Estimates (F1306)
- Maintenance Rules (F1393)
- Work Order Master (F4801)

The following graphic shows the process by which the system updates equipment numbers based on the Item Master table:

Figure 43–2 Updating Equipment Numbers Based on Item Master Table



When you update equipment numbers, the system submits the job directly to batch.

43.3.1 Before You Begin

- Back up any of the tables that you plan to update.
- Verify that no one accesses these equipment tables while you run this program. The program is unable to update records that are locked by other system applications. Any equipment information that a user accesses elsewhere in the system will not be affected by the update.

Update Accounts and Ledgers

This chapter contains these topics:

- [Section 44.1, "Updating Accounts and Ledgers"](#)
- [Section 44.2, "Updating Company and Account Numbers"](#)
- [Section 44.3, "Running the Repost Ledger Program"](#)
- [Section 44.4, "Updating the Equipment Item Number in the Account Ledger"](#)

44.1 Updating Accounts and Ledgers

You need to update the accounts and ledgers in your system if you change your chart of accounts, frequently add new pieces of equipment, and so on, for your organization.

44.2 Updating Company and Account Numbers

Navigation

From **Equipment/Plant Management (G13)**, enter 27

From **Advanced Operations (G1331)**, choose **Fixed Assets Global Updates**

From **Advanced Operations (G1231)**, choose **Update Company #, BU/Obj/Sub - F1202**

You must update company numbers and account numbers in the Item Balances table (F1202) when the company numbers and account numbers in the Item Balances table do not match those in the Account Master table (F0901). Company and account numbers in the Item Balances table might not match those in the Account Master table if you change an existing account number or company for an account within the fixed asset (FX) range.

Run the Update Company Number, Business Unit/Object/Subsidiary program any time that you change an existing account in your chart of accounts. For example, run this program when you:

- Change the object or subsidiary of an existing account
- Assign existing accounts to a different business unit
- Assign an existing business unit to a different company

Note: You do not have to run this program when you add an account number. You run this program only when you make changes to existing account numbers.

The Update Company Number, Business Unit/Object/Subsidiary program updates information from the Account Master table based on the system-assigned, short account ID number. The program does not update accounts in the Item Master table (F1201).

When you update company and account numbers, the system submits the job directly to batch.

44.2.1 Before You Begin

- Verify that no one accesses the general accounting or fixed asset tables. The program is unable to update accounts that are locked by other system applications. Any account that a user accesses elsewhere in the system will not be updated.

44.3 Running the Repost Ledger Program

Navigation

From Equipment/Plant Management (G13), enter 27

From Advanced Operations (G1331), choose Fixed Assets Global Updates

From Advanced Operations (G1231), choose Repost Ledger

You can repost damaged account balances in the Item Balances table (F1202) to restore system integrity. You should run the repost only if you have no other means of restoring account information. For example, run the repost if account balance information is damaged as a result of hardware failure.

The Repost Ledger program reposts only the transactions that include all of the following:

- A valid period number.
- A code that indicates a post to both the general ledger and equipment.
- A valid equipment number that exists in the Item Master table (F1201).
- A transaction ledger type set up in Item Setup Default Coding, if one doesn't already exist in the Item Balances table.
- A transaction account number in the Account Master table (F0901). The account number must be within the FX range of accounts in the automatic accounting instructions.
- Period postings for individual equipment. The transaction must not be a balance forward record and cannot be summarized by period and account.

Caution: The Repost Ledger program clears all summarized account balances to zero. Do not use this program if your system includes item balance records without general ledger transactions, as in the case of summarized depreciation computations or beginning balances created without an audit trail.

When you select Repost Ledger, a caution message appears. Proceed with the post. A versions list appears. The versions list contains DEMO versions that you can run, or copy and modify to suit your needs. When you run a version, Processing Options Revisions appear before the system submits the job for processing.

44.3.1 Before You Begin

- Verify that the following procedures are complete:
 - · All transactions are posted first to the general ledger and then to equipment.
 - · All depreciation and transfer transactions are posted first to equipment and then to the general ledger.
- Verify that no one accesses the general accounting or fixed asset tables. The program is unable to update accounts that are locked by other system applications. Any accounts that a user accesses elsewhere in the system will not be updated.

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about running, copying, and changing a DREAM Writer version

44.3.2 Processing Options

See [Section 58.3, "Item Balance Repost \(P12910\)"](#)

44.4 Updating the Equipment Item Number in the Account Ledger

Navigation

From Equipment/Plant Management (G13), enter 27

From Advanced Operations (G1331), choose Fixed Assets Global Updates

From Advanced Operations (G1231), choose Refresh Item Number in F0911

If you change the symbol you use to identify the item number for equipment, you must run the Refresh Item Number in F0911 program. Run this update to ensure that all posted account ledger transactions contain the current item number format.

The item number and the symbol used to identify it are stored in the Account Ledger table.

When you run Refresh Item Number in F0911, the job is submitted directly to batch.

44.4.1 Before You Begin

- Verify that no one accesses the general accounting or fixed asset tables. The program is unable to update accounts that are locked by other system applications. Any accounts that a user accesses elsewhere in the system will not be updated.

Data Purge and Archival

This chapter contains these topics:

- [Section 45.1, "Objectives"](#)
- [Section 45.2, "About Data Purge and Archival"](#)

45.1 Objectives

- To remove historical or obsolete information from Equipment/Plant Maintenance tables

45.2 About Data Purge and Archival

You can increase your system's processing speed and create more storage space for current data by deleting selected information from your system that is old or inaccurate. When you use the purge programs in Equipment/Plant Maintenance, you can purge entire tables or specific data within tables. You can also archive the information you purge.

Purging and archiving data consists of the following tasks:

- Purging work orders
- Purging selected equipment information

Purge Work Orders

This chapter contains this topic:

- [Section 46.1, "Purging Work Orders"](#)

46.1 Purging Work Orders

Navigation

From **Equipment/Plant Management (G13)**, enter 27

From **Advanced Operations (G1331)**, choose **Work Order Purge**

From **Advanced Shop Floor Control (G3131)**, choose **Purge Orders**

You can purge work orders from your system to free space and to make your system operate more efficiently.

When you run the Purge Orders program, you use data selection to specify which work orders to purge from the Work Order Master table (F4801). In addition, the system purges related information from the following tables for the work orders that you select:

- Work Order Instructions (F4802)
- Work Order Parts List (F3111)
- Work Order Routing Instructions (F3112)
- Work Order Time Transactions (F31122) that are not used by Equipment/Plant Maintenance
- Work Order Approvals (F4828)

You can use processing options to save purged work order information in a special purge library.

When you choose Purge Orders, a versions list appears. The versions list includes DEMO versions that you can run or copy and modify to suit your needs. When you run a version, Processing Options Revisions appears before the system submits the job for processing.

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about running, copying, or changing a DREAM Writer version

46.1.1 Processing Options

See [Section 58.4, "Work Order Purge \(P4801P\)"](#)

Purge Selected Equipment Information

This chapter contains this topic:

- [Section 47.1, "Purging Selected Equipment Information"](#)

47.1 Purging Selected Equipment Information

Navigation

From Equipment/Plant Management (G13), enter 27

From Advanced Operations (G1331), choose Fixed Assets Global Updates

From Advanced Operations (G1231), choose Purge Selected Asset Files

You can delete out-of-date or obsolete equipment information from your system. When you use the Purge Selected Asset Files program, you can purge entire data tables or specific data within the tables. You can also archive the records that you purge.

Use DREAM Writer versions to delete only those records that you specify in Processing Option Revisions. Company number and item number are mandatory data selections for this procedure.

Run the purge program to perform one or both of the following:

- Purge a piece of equipment that you disposed of in a prior year
- Purge the Item Balances table (F1202) for a prior year

When you run this program, all information that the system purges is transferred to a separate purge table. The purge table name is the same as the original table name with a P at the end. For example, the purge table for F1201 is F1201P.

If a purge table does not currently exist in your system, the program creates purge tables in the same library in which the corresponding tables exist. If the purge table already exists in your system, this program adds purged records to the existing table.

JD Edwards World strongly recommends that you back up any of the following tables you plan to purge:

- Item Master (F1201)
- Item Balances (F1202)
- Location Tracking (F1204)
- Item Messages (F1205)
- License Master (F1206)

- Maintenance Schedule (F1207)
- Parent History (F1212)
- Equipment Rental Rate (F1301)
- Status History (F1307)
- Maintenance Loops (F1308)
- Associated Service Types (F13907)
- Language Preference (F1201D)

After you run the purge program, you can save the purge tables on a diskette or tape to archive the information. You can then delete the purge tables from your system. You do not have to archive your purged equipment information. If you do not want to save the information in a purge table, delete it from the system without saving it on a diskette or tape.

Note: Ensure that no one accesses the general accounting or equipment tables while you run this procedure. The program is unable to purge information in tables that are locked by other system applications. Any information in tables that a user accesses elsewhere in the system will not be purged.

When you select Purge Selected Asset Files, a versions list appears. The versions list includes DEMO versions that you can run or copy and modify to suit your needs. When you run a version, Processing Options Revisions appears before the system submits the job for processing.

After the purge is complete, the program prints a report that includes the equipment number, description, responsible business unit, and disposal date (if applicable) of the purged equipment. The report also shows which tables included records that were purged and a summary showing how many records were purged from each table.

47.1.1 Before You Begin

- Run the Asset Account Balance Close program
- Back up any tables that you plan to purge

47.1.2 Processing Options

See [Section 58.5, "Purge Item Master and Item Balance Files \(P12912\)"](#).

Equipment/Plant Maintenance Reports

This chapter contains these topics:

- [Section 48.1, "Objectives"](#)
- [Section 48.2, "About Equipment/Plant Maintenance Reports"](#)

48.1 Objectives

- To identify the reports that are available in the Equipment/Plant Maintenance system
- To use reports for controlling and reporting on Equipment/Plant Maintenance

48.2 About Equipment/Plant Maintenance Reports

Equipment/Plant Maintenance provides a variety of reports to help you review and manage information about your equipment and its maintenance.

You can print cost reports to review financial information about your equipment. Cost reports can provide the following information:

- Equipment account balances, such as acquisition costs, revenue amounts, expense amounts, and so on
- Variances between revenue and expenses for a piece of equipment
- All equipment transactions

Equipment/Plant Maintenance includes two reporting tools that you can use to customize reporting information:

- Report Writer (STAR - Spreadsheet Tool for Asset Reporting)
- World Writer

Use Report Writer to generate custom reports from information stored in the Item Master table (F1201) and the Item Balances table (F1202).

Use World Writer reports to access information from all the tables on your system. You can create World Writer reports from any record or table in your database. JD Edwards World provides several predefined reports based on specific tables.

You can print work order reports to review information about maintenance work orders. Work order reports can provide the following information:

- Work order status
- Detailed or summarized work order costs

- Project information, including Gantt charts and project status summary
- Variances between projected and actual work order costs
- All work orders associated with a particular piece of equipment
- Work order parts and labor routing information by piece of equipment

You can print maintenance planning reports to review information about your planning processes. Maintenance planning reports provide information about projected PMs, projected parts requirements, and projected labor resource requirements

You can print PM reports to review PM information, such as:

- Status of service types for a piece of equipment
- Maintenance messages
- The frequency of occurrence for selected service types

Printing Equipment/Plant Maintenance reports consists of the following tasks:

- Printing equipment reports
- Printing cost reports
- Printing work order reports
- Printing maintenance planning reports
- Printing PM reports

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about running a DREAM Writer program

Print Equipment Reports

This chapter contains these topics:

- [Section 49.1, "Printing Equipment Reports"](#)
- [Section 49.2, "Printing the Supplemental Data by Item Report"](#)
- [Section 49.3, "Printing the Supplemental Data by Type Report"](#)
- [Section 49.4, "Printing the Specification Data Report"](#)
- [Section 49.5, "Printing the Location Tracking Report"](#)

49.1 Printing Equipment Reports

Print an equipment report to review and manage information, such as supplemental data, specification data, location history, and so on.

49.2 Printing the Supplemental Data by Item Report

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Information**

From **Equipment Information (G1311)**, choose **Supplemental Data**

From **Supplemental Data (G1318)**, choose **Report by Item**

You can print the Supplemental Data by Item report to review a list of additional information by supplemental data type that you assigned to individual pieces of equipment. For example, you can print a report that shows all supplemental data types assigned to a particular motor grader. This report draws its information from the following tables:

- Fixed Assets Supplemental Data Codes Types (F12092)
- Fixed Assets Supplemental Data Text (F12093)
- Item Master (F1201)
- General Message Detail (F00192)

Figure 49–1 Fixed Assets Suppl Data - By Item Number report

12400		JD Edwards World		Page Number	2
		Fixed Assets Suppl Data - By Item Number		Date	6/30/17
Item Number	1300	Backhoe, Caterpillar 426			
		Heavy Duty Bucket			
		Extendable Stick			
Parent Number	1300				
Company Number	50	A Model Construction Mgmt Co			
Location	5003	Airport Access Road			
Capacity					
=====					
	Capacity	Effective		Gallons	
		From	Through		
	-----	-----	-----	-----	
FU	06/30/17			28.00	
Fuel Capacity		Tickler Date . . .			
		Address Number . .			
OL	06/30/17	engine oil		2.20	
Oil Reserve Capacity		Tickler Date . . .			
		Address Number . .			
		Oil usage is variable based on load. Check oil levels in accordance to			
		maintenance schedule.			

				Total	30.20

49.2.1 Processing Options

See [Section 58.6, "Fixed Assets Supplemental Data \(P12400\)"](#).

49.3 Printing the Supplemental Data by Type Report

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment Information**

From **Equipment Information (G1311)**, choose **Supplemental Data**

From **Supplemental Data (G1318)**, choose **Report by Data Type**

You can print the Supplemental Data by Type report to review a list of additional equipment information based on a particular supplemental data type. For example, you set up a supplemental data type for vibration readings. You can print a report that displays vibration readings for all pieces of equipment for which you have assigned the supplemental data type for vibration readings. This report draws its information from the following tables:

- Fixed Assets Supplemental Data Codes Types (F12092)
- Fixed Assets Supplemental Data Text (F12093)
- Item Master (F1201)
- General Message Detail (F00192)

Figure 49-2 All Item Numbers by Data type - Item # report

12440		JD Edwards World		Page Number	2
		All Item Numbers by Data Type - Item #		Date	6/30/17
Capacity					
Item Number	Name	Effective Date	From	Through	Gallons
Capacity FU		Fuel Capacity			
1001	AA9 Motor Grader	6/30/17			100.00
	Tickler Date . . .		Address Number . .		
1300	Backhoe, Caterpillar 426	6/30/17			28.00
	Tickler Date . . .		Address Number . .		
Total for: Fuel Capacity					128.00
Capacity OL		Oil Reserve Capacity			
1001	AA9 Motor Grader	6/30/17	Engine oil		7.25
	Tickler Date . . .		Address Number . .		
	The oil usage is variable based on amount of loads being moved. Check oil levels on a regular basis.				
1300	Backhoe, Caterpillar 426	6/30/17	engine oil		2.20
	Tickler Date . . .		Address Number . .		
	Oil usage is variable based on load. Check oil levels in accordance to maintenance schedule.				
Total for: Oil Reserve Capacity					9.45
Total for: Capacity					137.45

49.3.1 Processing Options

See Section 58.8, "All Item Numbers by Data Type - Alpha/Item Number (P12440)".

49.4 Printing the Specification Data Report

Navigation

From Equipment/Plant Management (G13), choose Equipment Information

From Equipment Information (G1311), choose Supplemental Data

From Supplemental Data (G1318), choose Specification Data Report

You can print the Specification Data report to review the static data, such as nameplate information and specification sheet data that you record for individual pieces of equipment. This report draws its information from the following tables:

- Specification Data (F1216)
- Specification Cross Reference (F1215)

You can use processing options to print a template of the report that includes the equipment number and descriptions of the data fields, as well as space to record the data. You can then fill in the data for the equipment.

Figure 49-3 Specification Data Report

12416 Specification Data Report		JD Edwards World Date - 6/30/17	Page - 2
Item Number	11236	Motor, 500hp GE	
Page No.	01		
Unit Number	01.151	Motor, 500hp GE	
Description	EXHAUST FAN MOTOR		
Horsepower	500.00		
Phase	3		
Voltage			
RPM	1800		
Enclosure	EXPLOSION		
Frame	509LL		
Frequency (HZ)	60		
Type	K		
NEMA Design	B		
Manufacturer	GE	General Electric	
Model	SKS09RN204AE		
Serial Number	SKS09RN204		
Manager	8414	O'Malley, James P.	
Work Order			

49.4.1 Processing Options

See [Section 58.7, "Specification Data Report \(P12416\)"](#)

49.5 Printing the Location Tracking Report

Navigation

From Equipment/Plant Management (G13), choose Equipment Location Tracking

From Equipment Location Tracking (G1314), choose Location Tracking Report

Print the Location Tracking report to review equipment movement and relocations. Depending on the version that you run, the report shows information by item number or by location.

The Location Tracking report is a printed version of the information that appears on Transfer Processing. The system prints the current, historical, and planned (future) locations for each piece of equipment. You can also use this report to print location tracking text.

Figure 49-4 Location Tracking Report

12460		JD Edwards World				Page - . . . 2			
		Location Tracking Report				Date - . . . 6/30/17			
		By Item Number							
Item Number . .	10823	Exhaust Fan, 500hp							
Item Number	Location	Description	L C	From / Thru Date Begin	Remark	Transfer Number	Rt Cd	Quantity	Eq A St C
10823	Aisle.	L1	Bin.	C 05/05/17 00:00				38 1.00	1
	Bus Unit.	SHOP Obj. 8435	Sub.	00:00 Amt. Sbl/Type.		Rate Grp. Rate Tbl.		Curr Meter. Orig Meter.	
10823	Aisle.	STORES	Bin.	H 02/02/17 00:00	Component Transfer			NB 1.00	AV 1
	Bus Unit.	SHOP Obj. 8435	Sub.	03/15/17 00:00 Amt. Sbl/Type.		Rate Grp. Rate Tbl.		Curr Meter. Orig Meter.	
10823	Aisle.	L2	Bin.	H 03/15/17 00:00				36 NB 1.00	WK 1
	Bus Unit.	SHOP Obj. 8435	Sub.	04/07/17 00:00 Amt. Sbl/Type.		Rate Grp. Rate Tbl.		Curr Meter. Orig Meter.	
10823	Aisle.	MSHOP	Bin.	H 04/07/17 00:00				37 NB 1.00	DS 1
	Bus Unit.	SHOP Obj. 8435	Sub.	05/05/17 00:00 Amt. Sbl/Type.		Rate Grp. Rate Tbl.		Curr Meter. Orig Meter.	

49.5.1 Processing Options

See [Section 58.9, "Location Tracking Report \(P12460\)"](#)

Print Cost Reports

This chapter contains these topics:

- [Section 50.1, "Printing Cost Reports"](#)
- [Section 50.2, "Printing the Equipment Cost Analysis Report"](#)
- [Section 50.3, "Printing the Equipment Variance Report"](#)
- [Section 50.4, "Printing the Transaction Ledger Report"](#)
- [Section 50.5, "Working with Report Writer"](#)
- [Section 50.6, "Printing World Writer Reports"](#)

50.1 Printing Cost Reports

Print cost reports to review and analyze equipment costs and transactions, such as equipment account balances, variances between costs and revenues, and so on.

Printing cost reports consists of the following tasks:

- Printing the Equipment Cost Analysis report
- Printing the Equipment Variance report
- Printing the Transaction Ledger report
- Working with Report Writer
- Working with World Writer reports

50.2 Printing the Equipment Cost Analysis Report

Navigation

From **Equipment/Plant Management (G13)**, choose **Cost Inquiries and Reports**

From **Cost Inquiries and Reports (G1312)**, choose **Equipment Cost Analysis**

You can print the Equipment Cost Analysis report to review account balances for specific pieces of equipment. The report shows acquisition costs, depreciation amounts, revenue and expense amounts, and so on, for the equipment that you specify. You can analyze these amounts in month-to-date, year-to-date, or inception-to-date increments.

You can use processing options to show the equipment usage amounts in units, such as miles or hours. You can review the total units a piece of equipment has

accumulated, as well as the per unit cost. The system derives per unit costs by dividing account balances by total accumulated units.

You can choose from three versions of this report:

Version	Description
Detail	Shows account balances for each business unit and object account.
Summary	Shows interim total amounts only, such as: <ul style="list-style-type: none"> ■ Net book value ■ Revenue earned ■ Ownership costs ■ Operating costs ■ Maintenance costs ■ Usage amounts
Object	Shows the summarization of identical object accounts that belong to different business units.

You can use processing options to determine the ledger type that you want to review. You can also omit items with zero account balances. Using data selections, you can print this report for selected companies, business units, category codes, and so on.

50.2.1 Equipment Cost Analysis Report - Detail

50.2.2 Processing Options

See [Section 58.10, "Equipment Cost Analysis \(P12424\)"](#)

50.3 Printing the Equipment Variance Report

Navigation

From Equipment/Plant Management (G13), choose Cost Inquiries and Reports

From Cost Inquiries and Reports (G1312), choose Equipment Variance Report

Print the Equipment Variance report to review the total revenues and expenses generated by a piece of equipment, as well as the variance between revenue and expenses.

You can view usage hours and other unit costs for each item that you print. A grand total of revenue, expense, and usage amounts for all items prints at the end of the report.

You can use processing options to define the range of accounts that you want the system to use for calculating amounts. You must define an account range for the Standard Amount column, which represents revenue totals, and for the Actual Amount column, which represents expense totals. You must also specify the accounts from which unit amounts are drawn for the Actual Hours column.

The Estimated Rate, Actual Rate, and Rate Variance columns represent unit costs. The system calculates these unit costs by dividing revenue and expense amounts by actual hours.

Use processing options to specify a date range and indicate whether you want the report to print inception-to-date amounts. If you indicate inception-to-date amounts, the system adds prior year balances to the amounts that are within the date range you specify.

You can print two versions of the Equipment Variance report:

Version	Description
Variance by job	Prints amounts for equipment items that you have assigned to a particular location
Variance by item	Prints information about the pieces of equipment that you specify

50.3.1 Equipment Variance Report - By Job

50.3.2 Processing Options

See [Section 58.11, "Equipment Variance Report - by Item \(P13400\)"](#)

See [Section 58.12, "Equipment Variance Report - by Job \(P13400\)"](#)

50.4 Printing the Transaction Ledger Report

Navigation

From **Equipment/Plant Management (G13)**, choose **Cost Inquiries and Reports**

From **Cost Inquiries and Reports (G1312)**, choose **Transaction Ledger**

You can print the Transaction Ledger report to review all the transactions for a piece of equipment. The report prints the transactions by company and in the order that they occurred. You can view the item number, the affected account, a brief explanation, the G/L date, a dollar and unit amount, and so on, for each transaction. The report shows currency and unit totals for each company.

This section contains the following:

- [Section 50.5, "Working with Report Writer"](#)
- [Section 50.6, "Printing World Writer Reports"](#)

The transactions that print on the Transaction Ledger report come from the Account Ledger table (F0911), which stores journal entry audit trails. Unless you specify otherwise, the report includes all equipment transactions that have accumulated in the Account Ledger since the ledger was last summarized.

You can run two versions of this report:

Version	Description
Posted	Prints equipment transactions that are posted to equipment and the general ledger.
Unposted	Prints equipment transactions that are not posted to equipment. The transactions are not necessarily posted to the general ledger.

50.4.1 Transaction Ledger Report

Figure 50–1 Fixed Asset Ledger - Posted report

12420		JD Edwards World Fixed Asset Ledger - Posted				Page	-		22
						Date	-		6/08/17
Item Number	Subledger/Type G/L Account	Item Description Account Description Explanation	Do Ty	Document	G/L Date	Amount	Units	LT	D H
1300	YARD.8421	Backhoe, Caterpillar 426 Ownership Portion	1	T5	125 4/30/17	40.00-	8.00-	AA	
1329	YARD.8421	Truck, Pickup, Ford Ownership Portion	1	T5	125 4/30/17	6.00-	8.00-	AA	
1388	YARD.8421	Scrapper, Auger, CAT 651E Ownership Portion	1	T5	125 4/30/17	80.00-	8.00-	AA	
2049	YARD.8421	Truck, Pickup, Ford Ownership Portion	1	T5	125 4/30/17	6.00-	8.00-	AA	
1300	YARD.8422	Backhoe, Caterpillar 426 Operating Portion	1	T5	125 4/30/17	80.00-		AA	

50.4.2 Processing Options

See [Section 58.13, "Fixed Asset Ledger - Posted \(P12420\)"](#)

50.5 Working with Report Writer

Navigation

From Equipment/Plant Management (G13), choose Cost Inquiries and Reports

From Cost Inquiries and Reports (G1312), choose Report Writer

You can use Report Writer to maintain and print various versions of the Spreadsheet Tool for Asset Reporting (STAR). Report Writer performs functions similar to the standard DREAM Writer Version Selection, but you can define your report columns to suit your needs. Report Writer reports on information the system stores in the Item Master table (F1201) and the Item Balances table (F1202).

See Also:

- *JD Edwards World STAR Guide* for information about running, copying, and changing STAR versions

50.6 Printing World Writer Reports

You can use World Writer reports to access information from all the tables on your system. You can create World Writer reports from any record or table in your database. JD Edwards World provides several predefined reports based on specific tables. In Equipment/Plant Maintenance, these tables are as follows:

- License Master (F1206)
- Location Tracking (F1204)
- Status History (F1307)
- Maintenance Schedule (F1207)

You can access several predefined World Writer reports by choosing the following navigation paths:

- From the Equipment Information menu (G1311), choose World Writer Reports. The following reports are available:

- · License Renewal Report
- · Equipment Status History Report
- From the Equipment Location Tracking menu (G1314), choose Location World Writer Reports. The following reports are available:
 - · Equipment Location History Report
 - · Equipment Location Detail with Remarks Report
 - · Equipment Location Detail with Audit Trail Report
- From the Equipment/Plant Maintenance menu (G1315), choose World Writer. The following reports are available:
 - · Percent Complete Report - Item
 - · Percent Complete Report - Unit
 - · Work Order Status History Report

50.6.1 Sample - License Renewal Report

Figure 50-2 License Renewal Report

License Renewal Report									
Lic Ren	Issuing	Address	Item	Description	License	License	ST	Lic Ren	Lic Ren
MO	Agency	Line 1	Number		Number	Fee		Year	Day
2	2292	Colorado State Treasurer	1001	AA9 Motor Grader Ripper, Power Assist, Push Block, Scarifier, Encl Cab	PRF778	178.92	CO	99	28
Licensing Agency Address No. . 2292 Colorado State Treasurer									
Sum									178.92
Grand Total Level									
Sum									178.92

See Also:

- *JD Edwards World World Writer Guide* for additional information about creating, running, and changing World Writer reports

Print Work Order Reports

This chapter contains these topics:

- [Section 51.1, "Printing Work Order Reports"](#)
- [Section 51.2, "Printing Standard Work Order Reports"](#)
- [Section 51.3, "Printing Project Management Reports"](#)
- [Section 51.4, "Printing the Equipment History Report"](#)
- [Section 51.5, "Printing the Budget to Actual Report"](#)
- [Section 51.6, "Printing the Work Order Completion Report"](#)
- [Section 51.7, "Printing the Labor Utilization Report"](#)
- [Section 51.8, "Printing the Parts Forecast Report"](#)
- [Section 51.9, "Printing the Equipment Parts List Report"](#)

51.1 Printing Work Order Reports

Equipment/Plant Maintenance provides you with a variety of reports to help you review and manage information about work orders. Work order reports can provide the following:

- Standard work order information, such as work order status and work order costs
- Project management information, such as the costs associated with each phase
- Work order information for specific pieces of equipment, such as work orders associated with a particular equipment malfunction and total work orders completed for a piece of equipment
- Budget information, such as a comparison of estimated and actual work order costs
- Labor resource information, such as labor hours committed to a particular piece of equipment
- Parts information, such as parts requirements and parts availability for outstanding work orders

51.2 Printing Standard Work Order Reports

You can print standard work order reports to track the progress of work orders by status for a particular date. You can also review the costs associated with selected

work orders. In addition, you can print detailed reports about supplemental data for your work orders.

Printing standard work order reports consists of the following steps:

- Printing the Work Order Status report
- Printing the Work Order Cost Summary report
- Printing the Work Order Cost Detail report
- Printing the Work Order Supplemental Data by Order Report
- Printing the Work Order Supplemental Data by Type Report

51.2.1 Printing the Work Order Status Report

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Print Work Order Status Summary

Print the Work Order Status report to review the detailed information that you associate with work orders. You can use the report to track and compare the progress of selected work orders. The report includes:

- The number of hours planned for each work order
- The number of actual hours charged as of the date you specify on the report
- The difference between hours planned and hours charged to date

You can use processing options to determine whether the equipment unit number, item number, or serial number prints on the report.

51.2.2 Work Order Status Report

51.2.3 Processing Options

See [Section 58.14, "Work Order Summary Status - by Business Unit \(P48496\)"](#)

See [Section 58.15, "Work Order Summary Status - by Phase Code \(P48496\)"](#)

51.2.4 Printing the Work Order Cost Summary Report

Navigation

From Equipment/Plant Management (G13), choose Equipment Work Orders

From Equipment Work Orders (G1316), choose Print Work Order Cost Summary

Print the Work Order Cost Summary report to review cost information about work orders. The report includes:

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

You can use processing options to specify a date range for the report.

51.2.5 Work Order Cost Summary Report

51.2.6 Processing Options

See [Section 58.16, "Work Order Cost Summary \(P48497\)"](#)

51.2.7 Printing the Work Order Cost Detail Report

Navigation

From Equipment/Plant Management (G13), choose **Equipment Work Orders**

From **Equipment Work Orders (G1316)**, choose **Print Work Order Cost Detail**

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

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

Figure 51-1 Work Order Cost Detail report

48498		JD Edwards World				Page	-	2		
Phas	Cat	Cat	St	W.O. Number	Work Order Description	Work Order Cost Detail Explanation	Explanation 2	Actual Date	Actual Amount	G/L Date
				MB 4415	Bearing Replacement	Inventory Issue	Bearings, Roller		765.00	05/28/17
				MJ 3071	Too noisy - inspect/rep	Labor Billing Distributio	Regular	1.00	19.75	03/23/17
				MJ 1013	Inspect Bearings	Labor Billing Distributio	Regular	1.00	19.75	01/20/17
				MJ 1336	Replace Rubber Grids	Labor Billing Distributio	Regular	.50	12.64	01/20/17
						Inventory Issue	Couplings		204.00	02/16/17
						Inventory Issue	Rubber Grids		220.00	02/16/17
						Labor Billing Distributio	Regular	1.00	31.43	02/16/17
						Labor Billing Distributio	Regular	.50	8.98	02/16/17
				MJ 2043	Replace Hydraulics	Inventory Issue	Motor, 1/2 HP		27.50	03/18/17
						Inventory Issue	Hydraulic Pump		1,500.00	03/18/17
						Labor Billing Distributio	Regular	1.50	29.63	03/18/17
						Labor Billing Distributio	Regular	1.75	42.40	03/18/17
						A & D Parts Company	Hydraulic fluid/seals		39.95	03/31/17
				MJ 3459	Replace Rubber Grids	Inventory Issue	Couplings		204.00	03/25/17
						Inventory Issue	Rubber Grids		220.00	03/25/17
						Labor Billing Distributio	Regular	1.00	19.75	03/25/17
						Labor Billing Distributio	Regular	.50	12.64	03/25/17
				MJ 3483	Replace Rubber Grids	Inventory Issue	Couplings		204.00	04/08/17
						Inventory Issue	Rubber Grids		220.00	04/08/17
						Labor Billing Distributio	Regular	1.00	19.75	04/08/17
						Labor Billing Distributio	Regular	.50	8.98	04/08/17
				MJ 3505	Lubricate Bearings	Labor Billing Distributio	Regular	1.00	31.43	04/17/17
						Labor Billing Distributio	Regular	.50	8.98	04/17/17
				MJ 3514	Replace Rubber Grids	Inventory Issue	Couplings		204.00	05/18/17
						Inventory Issue	Rubber Grids		220.00	05/18/17
						Labor Billing Distributio	Regular	1.00	19.75	05/18/17
						Labor Billing Distributio	Regular	2.00	50.54	05/18/17
				MJ 3536	Replace Rubber Grids	Inventory Issue	Couplings		204.00	06/01/17
						Inventory Issue	Rubber Grids		220.00	06/01/17
						Labor Billing Distributio	Regular	1.00	19.75	06/01/17
						Labor Billing Distributio	Regular	.50	12.64	06/01/17
F1	MJ			3287	Won't Start	Labor Billing Distributio	Regular	1.25	39.29	06/15/17
F4	MJ			3261	Hydraulic fluid leak	Regular		2.00	43.00	04/01/17
						A & D Parts Company	Hydraulic Fluid		36.00	04/04/17
F4	MJ			3279	Won't Start	Labor Billing Distributio	Regular	1.00	19.75	06/15/17
F6	MJ			3252	Brake repair	Regular		4.75	117.56	04/01/17
						A & D Parts Company	Brake Parts		127.50	04/04/17
									25.25	5,204.34

51.2.8 Processing Options

See [Section 58.18, "Work Order Cost Detail \(P48498\)"](#)

51.2.9 Printing the Work Order Supplemental Data by Order Report

Navigation

From Work Order/Service Billing Processing (G48), choose Work Order Processing

From Work Order Processing (G4811), choose Supplemental Data

From Work Order Supplemental Data (G4813), choose Data by Order

Print the Work Order Supplemental Data by Order report to review a list of the additional information by data type that you assigned to individual work orders. The report contains a summary of the information stored in the following tables:

- Work Order Supplemental Data Types (F48090)
- Work Order Supplemental Data Base User Defined Fields (F48092)
- Work Order Master (F4801)

Figure 51-2 Work Order Profile Report

480400		JD Edwards World		Page Number 2	
Order Number . 122868 WO		Work Order Profile Report		Date 6/06/17	
Retool Line #1		Type 3	Capital Project	Work Order Date.	03/30/17
Business Unit.	M38	Priority . . . 3	Normal - ASAP	Start Date . . .	05/20/17
Branch/Plant .	STORES	Status MJ	W/O Completed	Requested . . .	05/20/17
Item Number. .		Phase 1	Project Phase 1	Planned Comp .	06/10/17
		Category 02. .		Completed. . .	06/10/17
		Category 03. .			
Equipment Listing					
Equip Clas	Description	Qty Req'd	Est. Cost	Date Req	Leadtim Remark
01	Motors (M)	2	500.00	05/20/17	20
06	Conveyors	1	1,000.00	05/25/17	60
17	Pressure Vessels	1	725.00	06/01/17	45
Total -		4	2,225.00		
Budget Estimate					
Section	Description	Units	Est. Cost	Date Req	Remark
01	General Requirements	1	500.00	05/20/17	
11	Equipment	3	2,250.00	05/28/17	
15	Mechanical	1	3,425.00	06/05/17	
16	Electrical	2	3,150.00	06/10/17	
Total -		7	9,325.00		
Total -		11	11,550.00		
Total -		11	11,550.00		

51.2.10 Printing the Work Order Supplemental Data by Type Report

Navigation

From Work Order/Service Billing Processing (G48), choose Work Order Processing

From Work Order Processing (G4811), choose Supplemental Data

From Work Order Supplemental Data (G4813), choose Data by Data Type

Print the Work Order Supplemental Data by Type report to review a list of additional work order information based on a particular supplemental data type. For example, assume that you have set up a supplemental data type for budget estimates. You can review a list of all work orders for which you have assigned the supplemental data type for budget estimates. The report contains a summary of the information stored in the following tables:

- Work Order Master (F4801)
- Work Order Supplemental Data Types (F48090)
- Work Order Supplemental Data Base User Defined Fields (F48092)

51.2.11 Work Order Cost Detail Report

Figure 51–3 Work Order Cost Detail report, part 1

480410		JD Edwards World		Page Number 2	
Equipment Listing				Date 6/06/17	
Equip Clas	Order No Ty	Qty Req'd	Est. Cost	Date Req	Leadtim Remark
01 Motors (M)	122868 WO	2	500.00	05/20/17	20
Total for: EQ		2	500.00		
06 Conveyors	122868 WO	1	1,000.00	05/25/17	60
Total for: EQ		1	1,000.00		
17 Pressure Vessles	122868 WO	1	725.00	06/01/17	45
Total for: ES		1	725.00		
Total for: 01		1	725.00		

Figure 51–4 Work Order Cost Detail report, part 2

480410		JD Edwards World		Page Number 3	
Budget Estimate				Date 6/06/17	
Section	Order No Ty	Units	Est. Cost	Date Req	Remark
01 General Requirements	122868 WO	1	500.00	05/20/17	
Total for: ES		1	500.00		
11 Equipment	122868 WO	3	2,250.00	05/28/17	
Total for: ES		3	2,250.00		
15 Mechanical	122868 WO	1	3,425.00	06/05/17	
Total for: ES		1	3,425.00		
16 Electrical	122868 WO	2	3,150.00	06/10/17	
Total for: ES		2	3,150.00		
Total for: 16		2	3,150.00		
Total for:		11	11,550.00		

51.3 Printing Project Management Reports

You can print project management reports to review and manage information about projects. You can review information about the specific tasks associated with a project, resource requirements, and so on.

Printing project management reports consists of the following tasks:

- Printing a Gantt Chart
- Printing the Task Details report
- Printing the Project Punch List report
- Printing the Project Status Summary Report

51.3.1 Printing a Gantt Chart

Navigation

From Work Order/Service Billing Processing (G48), choose Simple Project Management

From Simple Project Management (G4812), choose Gantt Chart

A Gantt Chart is a graph that shows time on the horizontal axis and tasks on the vertical axis. The chart gives you a graphical representation of start and end points of any series of tasks that make up a project.

When you use a Gantt Chart, you can:

- Review tasks quickly
- Determine which tasks precede others
- Determine if any tasks overlap
- Review under-utilized time between tasks

Use processing options to enter a date for the chart and to select the spreadsheet format that you want to use.

51.3.2 Gantt Chart

51.3.3 Processing Options

See [Section 58.19, "Print Work Order Gantt Chart \(P48440\)"](#)

51.3.4 Printing the Task Details Report

Navigation

From **Work Order/Service Billing Processing (G48)**, choose **Simple Project Management**

From **Simple Project Management (G4812)**, choose **Task Details**

Print the Task Details report to review a listing of the work orders included in a project. In addition to listing the work orders that make up a project, for each work order, the report includes:

- A description of the task
- Estimated number of hours
- Standard message
- Category code 01 (phase)
- An extended description of the task from record type A
- Any standard procedures

Figure 51-5 Detailed Task Description report

48492		JD Edwards World		2
Phase . . .		Detailed Task Description		4/26/17
W.O. Numb.	1986	Honda Accord 3000 mile maint	Assigned To	Hours
		Honda Accord 3000 mile maint		
		Honda Accord 3000 mile maint		
Message No	VEHICLE		Allen, Ray	3.00
These are general guidelines when working on any vehicle.				
1. Check tires for wear				
2. Check windshield for damages				
3. Check for body damage				
Look up the transmission diagnostic data in the Shop Manual. It seems to be hard to shift and is making a low level grinding noise.				

51.3.5 Printing the Project Punch List

Navigation

From Work Order/Service Billing Processing (G48), choose Simple Project Management

From Simple Project Management (G4812), choose Punch List

Print the Project Punch List to review a summary of the work requested and completed for each work order in a project.

The left side of the report includes the following information about the work that you request when you create a work order:

- Planned completion date
- Work order number and brief description
- Full description (everything associated with record type A for the work order)
- Any standard procedures

The right side of the report includes the following information about the work that is complete or in progress for each work order:

- Current status and status comment
- Manager

51.3.6 Project Punch List

51.3.7 Printing the Project Status Summary Report

Navigation

From Work Order/Service Billing Processing (G48), choose Simple Project Management

From Simple Project Management (G4812), choose Status Summary

Print the Project Status Summary report to review detailed and summary status of the projects assigned to a particular manager. The report lists:

- All work orders assigned to a particular manager
- Number of hours planned for each work order
- Actual hours charged as of the date of the report
- Either the number of hours remaining or the number of hours charged over the original estimate

After listing detailed information for each work order assigned to a particular manager, the report lists a summary of activity for that manager that includes:

- Status
- Type
- Phase (Category Code 01)
- Category Codes 02 through 10
- Priority

- Hours

51.3.8 SAR Status Report

51.4 Printing the Equipment History Report

From the DREAM Writer menu (G81), choose Versions List.

Print the Equipment History report to review the following information for equipment and equipment components:

- Work orders associated with each piece of equipment
- Problems and possible causes
- Actions that were taken to solve the problem

The report includes completed work orders. You can use processing options to specify a date range to control which work orders that you want to include in the report. You can also specify the work order category codes that you are using to define the problem. In addition, you can specify that the report print the actions that were taken to resolve the problem.

Note: You can only access this report by using the following procedure:

Enter P13420 in the Form field on Versions List. A versions list appears that contains a DEMO version of the report. You can run the DEMO version or copy and modify it to suit your needs. When you run a version, Processing Options Revisions appears before the system submits the report for processing.

Figure 51–6 Equipment History Report

13420		JD Edwards World Equipment History Report				Page - - - 2
Item Number	W.O.	W.O. Description	Complt Date	Failure Code	Action Taken	Actual Downtime
1223	122841	WO Plant Shutdown - Area 2	06/14/17			-----
1252	122892	WO Teardown Line #2	06/20/17			-----
1300	3308	WO broken hydraulic line	06/28/17	Improper Installation/Re		-----
	3279	WO Won't Start	05/08/17	Material or Corrosion Pr		-----
	3252	WO Brake repair	04/18/17	Out of Balance or Alignm		-----
1388	3287	WO Won't Start	05/13/17	Improper Start-Up or Ope		-----
	3261	WO Hydraulic fluid leak	04/20/17	Material or Corrosion Pr		-----
	3316	WO broken headlight	06/21/17	Normal Wear		-----
1564	3295	WO Re-align motor	05/17/17	Improper Installation/Re		-----
10823	3483	WO Replace Rubber Grids	04/08/17			-----
	3505	WO Lubricate Bearings	04/17/17			-----
	3514	WO Replace Rubber Grids	05/18/17			-----
	3536	WO Replace Rubber Grids	06/01/17			-----
10891	122850	WO Teardown Line #1	05/20/17			-----
	122868	WO Retool Line #1	06/10/17			-----
	122876	WO Clean Line #1	06/12/17			-----
	122884	WO Test Line #1	06/14/17			-----

See Also:

- JD Edwards World Technical Foundation Guide* for information about running, copying, and changing DREAM Writer versions

51.4.1 Processing Options

See [Section 58.20, "Equipment History Report \(P13420\)"](#)

51.5 Printing the Budget to Actual Report

From the DREAM Writer menu (G81), choose Versions List.

Print the Budget to Actual report to review work order information for specific pieces of equipment. The report is based on information from the Item Master table (F1201). The system totals amounts by equipment number. For each work order, the report includes:

- Estimated hours and amount
- Actual hours and amount
- Variance between estimated and actual hours and amounts

Note: You can only access this report by using the following procedure. Enter P13418 in the Form field on Versions List. A versions list appears that contains a DEMO version of the report. You can run the DEMO version or copy and modify it to suit your needs. When you run a version, Processing Options Revisions appears before the system submits the report for processing.

51.5.1 Before You Begin

- Run the Update Work Hours program to ensure current actual information

Figure 51-7 Budget to Actual report

13418		JD Edwards World Budget To Actual Report				Page Number	2
Item Number	Order Number	Estimated Hours	Estimated Amount	Actual Hours	Actual Dollars	Date	4/26/17
						Hour	Dollar
						Variance	Variance
	1006	1901	15.00	350.00		15.00	350.00
			15.00	350.00		15.00	350.00
	1221	4052	32.00			32.00	
			32.00			32.00	
	1223	122841					
	1228	4079	40.00			40.00	
			40.00			40.00	
	1229	4087	24.00			24.00	
			24.00			24.00	
	1252	122892	315.00	8,675.00		315.00	8,675.00
			315.00	8,675.00		315.00	8,675.00
	122905		550.00	16,500.00		550.00	16,500.00
			550.00	16,500.00		550.00	16,500.00
	122913		50.00	1,000.00		50.00	1,000.00
			50.00	1,000.00		50.00	1,000.00
	122921		200.00	6,000.00		200.00	6,000.00
			200.00	6,000.00		200.00	6,000.00
	1300	4183	3.50	155.85		3.50	155.85
			3.50	155.85		3.50	155.85
		4191	3.50	155.85		3.50	155.85
			3.50	155.85		3.50	155.85

See Also:

- *JD Edwards World Technical Foundation Guide* for information about running, copying, and changing DREAM Writer versions

51.5.2 Processing Options

See [Section 58.21, "Budget to Actual Report \(P13418\)"](#)

51.6 Printing the Work Order Completion Report

From the DREAM Writer menu (G81), choose Versions List.

Print the Work Order Completion report to review a list of work orders by individual pieces of equipment. You can use processing options to specify a date range to limit the work orders that you want to include in the report. The report includes the following information:

- The number of work orders created for a piece of equipment
- The number of work orders completed for a piece of equipment
- The number of work orders pending with parts requirements
- The percent of complete work orders
- The percent of pending work orders

Note: You can only access this report by using the following procedure: Enter P13430 in the Form field on Versions List. A versions list appears that contains a DEMO version of the report. You can run the DEMO version or copy and modify it to suit your needs. When you run a version, Processing Options Revisions appears before the system submits the report for processing.

Figure 51–8 Work Order Execution Report

13430		JD Edwards World Work Order Execution Report				Page - . . . 2	
						Date - . . . 4/26/17	
Item Number	Description	Received	Completed	Work Orders Pending Parts	Pending Other	Percent Complete	Percent Pend/Parts
1022	Honda Accord	1			1	0 %	0 %
1006	Office Building	1			1	0 %	0 %
1001	AA9 Motor Grader	2			2	0 %	0 %
1222	Manufacturing Area 1	2			2	0 %	0 %
1223	Manufacturing Area 2	2	1		1	50 %	0 %
1229	Bulk Handling	1			1	0 %	0 %
1227	Final Assembly & Packaging	2			2	0 %	0 %
1468	Pump, Fuel - Gate A-1	3			3	0 %	0 %
1492	Pump, Fuel - Gate A-2	3			3	0 %	0 %
1505	Pump, Fuel - Gate A-3	2			2	0 %	0 %
1513	Pump, Fuel - Gate A-4	2			2	0 %	0 %
1530	Pump, Fuel - Gate A-6	2			2	0 %	0 %
1548	Pump, Fuel - Gate A-7	2			2	0 %	0 %
1556	Pump, Fuel - Gate A-8	2			2	0 %	0 %
10891	Production Line 1	5	4		1	80 %	0 %
1252	Production Line 2	5	4		1	80 %	0 %
1221	Raw Materials Prep	2			2	0 %	0 %
1564	Motor, Pump	2	1		1	50 %	0 %
1228	Shipping & Receiving	1			1	0 %	0 %
1225	Steam Plant, Boiler Room	1			1	0 %	0 %
11009	Feedscrew Gearbox #1	1			1	0 %	0 %
11017	Conveyor #1	2			2	0 %	0 %
10823	Exhaust Fan, 500hp	22	11	2	9	50 %	18 %
10840	Forced Draft, Boiler #1	1			1	0 %	0 %
11201	Exhaust Fan, 500hp	5			5	0 %	0 %
10655	Flow Pump #2, Bulk Handling	1			1	0 %	0 %
10647	Flow Pump #1, Bulk Handling	1			1	0 %	0 %
10989	Pump, Common White Water #1	1			1	0 %	0 %
10971	Hydraulic Pump #1	2			2	0 %	0 %
11033	Filter, Pump, Prim. Grndr. #1	1			1	0 %	0 %
10663	Tank #1, Bulk Handling "Farm"	1			1	0 %	0 %
10671	Tank #2, Bulk Handling "Farm"	1			1	0 %	0 %
10858	Boiler Operator controls	1			1	0 %	0 %
10920	Primary Grinder #1	2			2	0 %	0 %
10874	Valve, Primary Boiler Feed	2			2	0 %	0 %
10866	Electrostatic Precipitator	1			1	0 %	0 %
1329	Truck, Pickup, Ford	3			3	0 %	0 %
2049	Truck, Pickup, Ford	3			3	0 %	0 %
1300	Backhoe, Caterpillar 426	11	3		8	27 %	0 %
2053	Backhoe, Caterpillar 416	3			3	0 %	0 %
1388	Scraper, Auger, CAT 651E	5	3		2	60 %	0 %
1040	Caterpillar Grader, 140G 1998	1			1	0 %	0 %
1042	Caterpillar Crawler, 1997	1			1	0 %	0 %
		115	27	2	86	23 %	2 %

See Also:

- *JD Edwards World Technical Foundation Guide* for information about running, copying, and changing DREAM Writer versions

51.6.1 Processing Options

See [Section 58.22, "Work Order Execution Report \(P13430\)"](#)

51.7 Printing the Labor Utilization Report

From the DREAM Writer menu (G81), choose Versions List.

Print the Labor Utilization report to review a list of work orders created for a piece of equipment and the hours associated with each labor routing step, such as Electrical, Mechanical, and so on. The report also shows the total hours associated with each work order. You can use processing options to specify a date range to limit the work orders that you want to include in the report.

Note: You can only access this report by using the following procedure: Enter P13440 in the Form field on Versions List. A versions list appears that contains a DEMO version of the report. You can run the DEMO version or copy and modify it to suit your needs. When you run a version, Processing Options Revisions appears before the system submits the report for processing.

Figure 51-9 Labor Utilization Report

13440		JD Edwards World				Page - . . . 2		
		Labor Utilization Report				Date - . . . 4/26/17		
Item Number	W.O.	W.O. Description	Shop	Shop Description	Estimate Hours	Actual Hours		
00001001	1960	250 HR Maint-AA9 Mot	MECH	Lub Circle Gear	.50			
			MECH	Drain Fuel Tank Sump	1.00			
			MECH	Check Coolant Level	.50			
			MECH	Lub Frame Hinge Pivo	.25			
			MECH	Check Engine Oil Lev	.25			
			MECH	Check Trans Oil Leve	.25			
				MECH	Perform Oil Sampling	.50		
				MECH	Check Tire Pressure	.25		
						3.50		
	1978	500 HR Maint-AA9 Mot	MECH	Lub Circle Gear	.50			
			MECH	Drain Fuel Tank Sump	1.00			
			MECH	Check Coolant Level	.50			
			MECH	Lub Frame Hinge Pivo	.25			
MECH			Check Engine Oil Lev	.25				
MECH			Check Trans Oil Leve	.25				
			MECH	Perform Oil Sampling	.50			
			MECH	Check Tire Pressure	.25			
					3.50			
00001006	1986	Honda Accord 3000 mi	MECH	Maintenance Steps				
			MECH	Clean/tighten batter	.50			
			MECH	Check air inlet cove	.50			
			MECH	Clean/replace air cl	.75			
			MECH	Check belt tension	.25			
			MECH	Lub locking pin hole	.25			
			MECH	Lub draft frame circ	.50			
			MECH	Check tire pressure	.25			
					3.00			
00001040	1994	250 HR Maint-1986 14	MECH	Lub Circle Gear	.50			
			MECH	Drain Fuel Tank Sump	1.00			
			MECH	Check Coolant Level	.50			
			MECH	Lub Frame Hinge Pivo	.25			
			MECH	Check Engine Oil Lev	.25			
			MECH	Check Trans Oil Leve	.25			
			MECH	Perform Oil Sampling	.50			
			MECH	Check Tire Pressure	.25			
					3.50			
00001042	2006	250 HR Maint Proc	MECH	Lub Circle Gear	.50			
			MECH	Drain Fuel Tank Sump	1.00			
			MECH	Check Coolant Level	.50			
			MECH	Lub Frame Hinge Pivo	.25			
			MECH	Check Engine Oil Lev	.25			
			MECH	Check Trans Oil Leve	.25			
			MECH	Perform Oil Sampling	.50			
			MECH	Check Tire Pressure	.25			
					3.50			

See Also :

- *JD Edwards World Technical Foundation Guide* for information about running, copying, and changing DREAM Writer versions

51.7.1 Processing Options

See [Section 58.23, "Labor Utilization Report \(P13440\)"](#)

51.8 Printing the Parts Forecast Report

From the DREAM Writer menu (G81), choose Versions List.

Print the Parts Forecast report to review a list of parts and work orders by branch. You can use processing options to specify a date range to control which work orders that you want to include in the report. The report includes the following information:

- Equipment number on the work order
- Planned complete date
- Parts required
- Availability of the parts

Note: You can only access this report by using the following procedure. Enter P13450 in the Form field on Versions List. A versions list appears that contains a DEMO version of the report. You can run the DEMO version or copy and modify it to suit your needs. When you run a version, Processing Options Revisions appears before the system submits the report for processing.

Figure 51–10 Parts Forecast Report

13450		JD Edwards World		Page - . . . 2		
		Parts Forecast Report		Date - . . . 4/21/17		
Part Number	Description	Work Order	Item Number	Date Rqd	Parts Rqd	On Hand
WHITE PAINT	Anti-Rust	3906	10663	06/15/17	100	100-
		4319	10823	06/15/17	8	108-
		4343	10971	06/15/17	8	116-
		3973	10920	06/28/17	8	124-
GE500-18T	Motor, 500 HP	4360	11201	06/15/17	1	
S087-0612	Shaft, Direct Drive	4360	11201	06/15/17	1	
60D404	Couplings	4280	10823	06/15/17	3	13
		120926	11201	06/22/17	3	10
3612	Rubber Grids	4280	10823	06/15/17	4	4
		120926	11201	06/22/17	4	
7493218	Motor, 1/2 HP	4319	10823	06/15/17	0	6
		4343	10971	06/15/17	1	5
		3949	10874	06/18/17	1	4
512-EATON	Hydraulic Pump	4319	10823	06/15/17	0	1
		4343	10971	06/15/17	1	
		3973	10920	06/26/17	1	1-
301KDD	Bearings, Roller	4360	11201	06/15/17	3	5
		4415	11017	06/19/17	0	5
99365	Front Bearing Housing	3885	10840	06/15/17	1	
		4360	11201	06/15/17	1	1-
99665	Rear Bearing Housing	3885	10840	06/15/17	1	
		4360	11201	06/15/17	1	1-
301W	Bearing	3885	10840	06/15/17	2	13
		4360	11201	06/15/17	2	11
722	Variable Pitch Hyd. PP	4360	11201	06/15/17	1	1-
AR101278	Engine Oil Filter	4183	1300	06/15/17	1	19
		4191	1300	06/15/17	1	18
		4263	2053	06/15/17	1	17
		4271	2053	06/15/17	1	16
AT105663	Hydraulic Oil Filter	4183	1300	06/15/17	1	19
		4191	1300	06/15/17	1	18
		4263	2053	06/15/17	1	17
		4271	2053	06/15/17	1	16
AT105664	Transmission Oil Filter	4183	1300	06/15/17	1	19
		4191	1300	06/15/17	1	18
		4263	2053	06/15/17	1	17
		4271	2053	06/15/17	1	16
AR86745	Fuel Filter	4183	1300	06/15/17	1	19
		4191	1300	06/15/17	1	18
		4263	2053	06/15/17	1	17

See Also:

- *JD Edwards World Technical Foundation Guide* for information about running, copying, and changing DREAM Writer versions

51.8.1 Processing Options

See [Section 58.24, "Parts Forecast Report \(P13450\)"](#)

51.9 Printing the Equipment Parts List Report

From the DREAM Writer menu (G81), choose Versions List.

Print the Equipment Parts List report to review parts information associated with individual pieces of equipment. You can review the location of the parts and the availability of the parts. In addition, you can use processing options to select which branch or location the system searches for parts information.

Note: You can only access this report by using the following procedure: Enter P13410 in the Form field on Versions List. A versions list appears that contains a DEMO version of the report. You can run the DEMO version or copy and modify it to suit your needs. When you run a version, Processing Options Revisions appear before the system submits the report for processing.

51.9.1 Equipment History Report

Figure 51–11 Equipment Parts List Report

13410		JD Edwards World		Page - . . . 2	
		Equipment Parts List Report		Date - . . . 4/26/17	
Item Number	Description	Parts	Description	Cpnt. Branch	Required On Hand
00010823	Exhaust Fan, 500hp	764033	Rotor	STORES	1 3
		SHAFT MAINT PM KIT	Shaft Maintenance PM Kit	STORES	1
		60D404	Couplings	STORES	3 16
		3612	Rubber Grids	STORES	4 8
		HYDRAULICS PM KIT	Motor Replacement PM Kit	STORES	1
		7493218	Motor, 1/2 HP	STORES	1 6
		512-EATON	Hydraulic Pump	STORES	1
		HYDRAULIC OIL	Hydraulic Oil	STORES	8
		HYDRAULIC SEALS	Hydraulic Seals	STORES	1
		MOTOR REBUILD PM KIT	Motor Rebuild PM Kit	STORES	1
		GE500-18T	Motor, 500 HP	STORES	1 1
		S087-0612	Shaft, Direct Drive	STORES	1 1
		301KDD	Bearings, Roller	STORES	3 8
		99365	Front Bearing Housing	STORES	1 1
		99665	Rear Bearing Housing	STORES	1 1
		301W	Bearing	STORES	2 15
00011201	Exhaust Fan, 500hp	722	Variable Pitch Hyd. PP	STORES	1
		764033	Rotor	STORES	1 3
		SHAFT MAINT PM KIT	Shaft Maintenance PM Kit	STORES	1
		60D404	Couplings	STORES	3 16
		3612	Rubber Grids	STORES	4 8
		HYDRAULICS PM KIT	Motor Replacement PM Kit	STORES	1
		7493218	Motor, 1/2 HP	STORES	1 6
		512-EATON	Hydraulic Pump	STORES	1
		HYDRAULIC OIL	Hydraulic Oil	STORES	8
		HYDRAULIC SEALS	Hydraulic Seals	STORES	1
		MOTOR REBUILD PM KIT	Motor Rebuild PM Kit	STORES	1
		GE500-18T	Motor, 500 HP	STORES	1 1
		S087-0612	Shaft, Direct Drive	STORES	1 1
		301KDD	Bearings, Roller	STORES	3 8
		99365	Front Bearing Housing	STORES	1 1
		99665	Rear Bearing Housing	STORES	1 1
301W	Bearing	STORES	2 15		
00011244	Hydraulics	722	Variable Pitch Hyd. PP	STORES	1
		7493218	Motor, 1/2 HP	STORES	1 6
		512-EATON	Hydraulic Pump	STORES	1
00011252	Shaft Assembly	HYDRAULIC OIL	Hydraulic Oil	STORES	8
		HYDRAULIC SEALS	Hydraulic Seals	STORES	1
		60D404	Couplings	STORES	3 16
		3612	Rubber Grids	STORES	4 8

See Also :

- *JD Edwards World Technical Foundation Guide* for information about running, copying, and changing DREAM Writer versions

51.9.2 Processing Options

See [Section 58.25, "Equipment Parts List Report \(P13410\)"](#).

Print Maintenance Planning Reports

This chapter contains these topics:

- [Section 52.1, "Printing Maintenance Planning Reports"](#)
- [Section 52.2, "Printing the PM Projections Report"](#)
- [Section 52.3, "Printing the Maintenance Schedule Report"](#)
- [Section 52.4, "Printing the MRP Schedule and Message Detail Report"](#)
- [Section 52.5, "Printing Labor Planning Reports"](#)
- [Section 52.6, "Printing the Maintenance Log Report"](#)
- [Section 52.7, "Printing the Frequency of Occurrence Report"](#)
- [Section 52.8, "Printing World Writer Reports"](#)

52.1 Printing Maintenance Planning Reports

You can print maintenance planning reports to review and manage information about future parts and labor resource requirements.

52.2 Printing the PM Projections Report

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose PM Projections Report

Print the PM Projections report to review information about forecasted PMs. This report draws its information from the PM Projections table (F13411).

The PM forecast includes four periods. You can use processing options to define the periods as weeks, months, or quarters. You can also define the beginning period date, the forecast type, and whether to print a parts list report. The PM Projections Parts List prints all of the parts associated with the projected PMs in a summarized report.

Figure 52-1 PM Projection Print - Weekly report

13412		JD Edwards World PM Projection Print - Weekly					Page - - - 2 Date - - - 4/26/17				
Item Number	Serv Type	Frequency		Estimated Hours by Period			-				
		Days	Miles	Fuel	Hours	Occur	1 06/01/17	2 06/08/17	3 06/15/17	4 06/22/17	Total
1001	LUBE										
	OIL	30									
	1000		1,000.00-								
	250		250.00-								
	500		500.00-								
1006	AIR/HEAT										
	EXTIN										
	FIRE	90				1.00				3.50	3.50
	BALCON										
	WINDOW	120									
1018	VEHICLE		3,000.00-								
1040	1000		1,000.00-								
	250		250.00-								
	500		500.00-								
1042	1000		1,000.00-								
	250		250.00-								
	500		500.00-								
1300	INSPECT										
	WASH										
	1000				1,000.00						
	250	35			250.00	1.00				3.50	3.50
	500	70		350.00-	500.00						
1329	INSPECT										
	OIL	30	3,500.00-			1.00					
	TIRES	90									
1388	INSPECT										
	1000				1,000.00						
	250	30			250.00						
	500	60		800.00-	500.00						

52.2.1 Processing Options

See [Section 58.36, "PM Projection Print - Weekly \(P13412\)"](#)

See [Section 58.34, "PM Projection Print - Monthly \(P13412\)"](#)

See [Section 58.35, "PM Projection Print - Quarterly \(P13412\)"](#)

52.3 Printing the Maintenance Schedule Report

Navigation

From **Equipment/Plant Management (G13)**, choose **Equipment/Plant Maintenance**

From **Equipment/Plant Maintenance (G1315)**, choose **Maintenance Schedule**

Print the Maintenance Schedule report to review the status of preventive maintenance for equipment.

The Maintenance Schedule report shows the service types that you assign for each piece of equipment on the preventive maintenance schedule. Depending on the maintenance status of each service type, the system determines whether it is scheduled, in process, or complete.

You can run three versions of the report:

Version	Description
Completed maintenance	Prints service types that have a maintenance status of 98 (canceled) or 99. The completion date prints, as well as the total miles, fuel, hours, or other user defined statistical units for the equipment. The address book number of the employee completing the service also prints.

Version	Description
Scheduled maintenance	Prints service types that have a maintenance status of less than 98. If you schedule the service for a specific date, the date prints. If you schedule the service at intervals, the number of days prints. If you schedule the service, for example, according to miles, fuel, hours, or other user defined statistical units, the appropriate numbers print.
Mechanic's worksheet	Prints service types that have a user defined maintenance status, for example, between 50 and 70. If you schedule service according to miles, fuel, hours, or other user defined statistical units, the current readings for the item print. The % Due column on the report shows how close the service is to being due or whether it is overdue. The address number of the employee assigned to the task also prints.

You can change maintenance statuses to suit your needs in user defined codes (system 12, type MS).

See Also:

- [Chapter 36, "Set Up User Defined Codes"](#)

52.3.1 Processing Options

See [Section 58.26, "Completed Maintenance Records \(P12407\)"](#)

See [Section 58.28, "Scheduled Maintenance Records \(P12407\)"](#)

See [Section 58.27, "Mechanic's Worksheet \(P12407\)"](#)

52.4 Printing the MRP Schedule and Message Detail Report

Navigation

From **Equipment/Plant Management (G13)**, choose **Maintenance Planning**

From **Maintenance Planning (G1322)**, choose **Material Planning**

From **Material Planning (G1323)**, choose **Print Schedule and Messages**

Print the Material Requirements Planning (MRP) Schedule and Message Detail report to review a projection of inventory availability for individual maintenance items. You can also use this report to print any outstanding planning messages.

Your latest material plan generation supplies the information for the MRP Schedule and Message Detail report. The report is a printed version of the information you can access online using Item Availability by Time and Detail Messages.

You use processing options to select the items that print on the report and to determine whether to print the time series, planning messages, or both. You also define the row types that print for each time series. Row types determine the quantity type information, such as Beginning Available, Ending Available, and so on. In addition, you define the columns that print for each time series. Columns determine the time periods that you want to review. The report also provides detailed information for each item, such as quantity on hand, buyer numbers, and planner numbers.

52.4.1 MRP Schedule & Message Detail Report

Figure 52–2 MRP Schedule & Message Detail report

3450		JD Edwards World				Page 1	
		MRP Schedule & Message Detail				Date 4/26/17	
						Branch/Plt M30	
Item 512-EATON	Quantity on Hand 1	Buyer Number 8400	Planner, Mark				
Hydraulic Pump	Safety Stock	Planner Number 9200	Dobson, Jane				
U/M. EA	Order Minimum	Policy Code/Value 1 /					
Fmly 8 Maintenance Purchasing	Order Maximum	Stocking Type P					
Plan Code 2	Multiple Order Qua	Leadtime Lvl/Mfg/Cum	/ /				
. Planning Messages.							
Message	Planner Remarks	Order No	Ty	Quantity	Start	Due	Supplier Supplier Name Recommended

Item 512-EATON	Quantity on Hand	Buyer Number 8400	Planner, Mark				
Hydraulic Pump	Safety Stock	Planner Number 9200	Dobson, Jane				
U/M. EA	Order Minimum	Policy Code/Value 1 /					
Fmly 8 Maintenance Purchasing	Order Maximum	Stocking Type P					
Plan Code 2	Multiple Order Qua	Leadtime Lvl/Mfg/Cum	90 / /				
. Time Series - Ending Period.							
	06/01/17 LPF	06/02/17	06/03/17	06/04/17	06/05/17	06/08/17	06/09/17

+ Beginning Avail (Unadjusted)							
- Firm Work Orders							
= Ending Avail (Unadjusted)							
+ Planned Orders							
	06/10/17	06/11/17	06/12/17	06/15/17	06/16/17		

+ Beginning Avail (Unadjusted)							
- Firm Work Orders					1		1-
= Ending Avail (Unadjusted)					1-		1-
+ Planned Orders					1		
. Planning Messages.							
Message	Planner Remarks	Order No	Ty	Quantity	Start	Due	Supplier Supplier Name Recommended

Order & Expedi		OP		1	05/29/17	06/15/17	4343 Vector Manufacturin 05/29/17 06/15/17
Order & Expedi		OP		1	05/29/17	06/26/17	4343 Vector Manufacturin 05/29/17 06/26/17

52.4.2 What You Should Know About

Topic	Discussion
Start dates	The start date must be within the planning horizon that you defined when you ran the Parts Plan Generation for which this report applies. You can indicate a start date for the report that is different from that of the original plan generation. However, you should ensure that past due time periods for the report is set to zero.
Past due amounts	The number of time periods (columns) that you specify to print on the report includes the number of weeks that you specify for past due amounts.

52.4.3 Processing Options

See [Section 58.33, "Schedule & Message Detail \(P3450\)"](#)

52.5 Printing Labor Planning Reports

Print Labor Planning reports to review and manage detailed information about future labor resource requirements.

Printing labor planning reports consists of the following tasks:

- Printing the Load and Detail Messages report
- Printing the Period Summary report

52.5.1 Printing the Load and Detail Messages Report

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Labor Planning

From Labor Planning (G1324), choose Print Load and Detail Messages

Print the Load and Detail Messages report to review time series information for a work center, outstanding action messages for a work center, or both. You can print the information for all work centers or for selected work centers.

Use processing options to control the following information on the report:

- Time period
- Unit of measure for load information
- The type of planning
- Capacity requirements, capacity messages, or both
- The user defined code for row descriptions

You can run three versions of the Load and Detail Messages report. However, the Equipment/Plant Management system uses the Capacity Requirements Planning version.

You use processing options to select the type of planning information that prints on the report.

52.5.2 Capacity Requirements Report

Figure 52-3 Capacity Requirements report

3350		JD Edwards World										Page	2
Business Unit . .		Capacity Requirements										Date	4/26/17
Dispatch Group .		Efficiency										100.00	Prime Load Code . . L
Unit of Measure. HR		Utilization.										100.00	Run Labor Hours
. . . Time Series - Ending Period. . .													
06/01/17 06/02/17 06/03/17 06/04/17 06/05/17 06/08/17 06/09/17 06/10/17 06/11/17 06/12/17 06/15/17 06/16/17													
LOAD-INCLUDES SETUP													
Released Load												4	3
Planned Load													
Total Load												4	3
LOAD VS CAPACITY													
Gross Capacity	24	24	24	24	24	24	24	24	24	24	24	24	24
Rated Capacity	24	24	24	24	24	24	24	24	24	24	24	24	24
% of Capacity Used												1	13
Available Capacity	24	24	24	24	24	24	24	24	24	24	24	20	21
Accum. Available Cap	24	48	72	96	120	144	168	192	216	240	260	281	
. Planning Messages.													
Message		Total Units		UM	% of Rated	Per. End	Planner Remarks						
Under Capacity				HR		06/01/17							
Under Capacity				HR		06/02/17							
Under Capacity				HR		06/03/17							
Under Capacity				HR		06/04/17							
Under Capacity				HR		06/05/17							
Under Capacity				HR		06/08/17							
Under Capacity				HR		06/09/17							
Under Capacity				HR		06/10/17							
Under Capacity				HR		06/11/17							
Under Capacity				HR		06/12/17							
Under Capacity		4		HR	16.67	06/15/17							
Under Capacity		3		HR	12.50	06/16/17							
Under Capacity				HR		06/17/17							
Under Capacity				HR		06/18/17							
Under Capacity				HR		06/19/17							
Under Capacity				HR		06/26/17							
Under Capacity				HR		07/02/17							
Under Capacity		2		HR	1.67	07/10/17							
Under Capacity				HR		07/17/17							
Under Capacity				HR		07/24/17							
Under Capacity				HR		07/31/17							
Under Capacity				HR		08/31/17							
Under Capacity				HR		09/30/17							
Under Capacity				HR		10/30/17							

52.5.3 What You Should Know About

Topic	Discussion
Load types	<p>A load type describes the type of labor demand placed on a work center. The system calculates the five load types as follows:</p> <ul style="list-style-type: none"> ■ Rated Profile - the total resource units from the Work Center Revisions screen. ■ Loaded Profile - the load that is forecast from the planned and released work orders. ■ Percent Resource Used - the Loaded Profile divided by the Rated Profile. ■ Resource Available - the Loaded Profile subtracted from the Rated Profile. ■ Cumulative Resource Available - a running total of the resource available. If a work center runs over capacity, this could be a negative number. If the work center runs under capacity, the cumulative resources could increase each period.
Units of measure	<p>If you enter a unit of measure in the processing options, it must be the same unit of measure in the Account Master table for the work center.</p>

52.5.4 Processing Options

See [Section 58.38, "Planning \(P3350\)"](#)

52.5.5 Printing the Period Summary Report

Navigation

From Equipment/Plant Management (G13), choose Maintenance Planning

From Maintenance Planning (G1322), choose Labor Planning

From Labor Planning (G1324), choose Print Period Summary

Print the Period Summary report to review information for Capacity Requirements Planning (CRP).

The report includes all items scheduled at the work centers during the time period you specify. In addition, it lists the number of resource units required to complete each work order and the percent above or below the total load on the work center.

In addition to specifying the time period, you can use processing options to control the following information on the report:

- Unit of measure for load information
- Type of planning

You can specify the type of planning by selecting the appropriate report version. Equipment/Plant Maintenance uses the CRP version.

52.5.6 Period Summary Report

Figure 52-4 Period Summary report

3352		JD Edwards World				Page - 2		
		Period Summary				Date - 4/26/17		
Business Unit . .	MECH Mechanical	Efficiency . . .	100.00		Prime Load Code. L			
Dispatch Group .	MAINT Maintenance	Utilization. . .	100.00		Run Labor Hours			
Unit of Measure.	HR Hour							
Item								
Number	Item Description	Per. End	Units	UM	Percen	Order Number	Ty	Requirement Type
MOTOR REBUILD PM KIT	Motor Rebuild PM Kit	06/12/17	16	HR	100.00	138747	FO	Firm Work Order W/Parts List
Total for Period Ending		06/12/17	16	HR				
CORRECTIVE MAINTENAN	Corrective Maintenance	06/15/17	40	HR	80.00	3906	FO	Firm Work Order W/Parts List
CORRECTIVE MAINTENAN	Corrective Maintenance	06/15/17	3	HR	6.00	3885	FO	Firm Work Order W/Parts List
CORRECTIVE MAINTENAN	Corrective Maintenance	06/15/17	2	HR	4.00	3922	FO	Firm Work Order W/Parts List
CORRECTIVE MAINTENAN	Corrective Maintenance	06/15/17	2	HR	4.00	4159	FO	Firm Work Order W/Parts List
HYDRAULICS PM KIT	Motor Replacement PM Kit	06/15/17	2	HR	4.00	4343	FO	Firm Work Order W/Parts List
SHAFT MAINT PM KIT	Shaft Maintenance PM Kit	06/15/17	1	HR	2.00	4280	FO	Firm Work Order W/Parts List
Total for Period Ending		06/15/17	50	HR				
HYDRAULICS PM KIT	Motor Replacement PM Kit	06/16/17	2	HR	66.67	4319	FO	Firm Work Order W/Parts List
HYDRAULICS PM KIT	Motor Replacement PM Kit	06/16/17	2	HR	66.67	138739	FO	Firm Work Order W/Parts List
Total for Period Ending		06/16/17	4	HR				
HYDRAULICS PM KIT		06/18/17	6	HR	100.00	3965	FO	Firm Work Order W/Parts List
Total for Period Ending		06/18/17	6	HR				
HYDRAULICS PM KIT		06/19/17	24	HR	88.89	4087	FO	Firm Work Order W/Parts List
HYDRAULICS PM KIT		06/19/17	3	HR	11.11	4028	FO	Firm Work Order W/Parts List
Total for Period Ending		06/19/17	27	HR				
CORRECTIVE MAINTENAN	Corrective Maintenance	06/26/17	40	HR	36.36	3914	FO	Firm Work Order W/Parts List
CORRECTIVE MAINTENAN	Corrective Maintenance	06/26/17	24	HR	21.82	4010	FO	Firm Work Order W/Parts List
CORRECTIVE MAINTENAN	Corrective Maintenance	06/26/17	20	HR	18.18	4036	FO	Firm Work Order W/Parts List
CORRECTIVE MAINTENAN	Corrective Maintenance	06/26/17	20	HR	18.18	4044	FO	Firm Work Order W/Parts List
CORRECTIVE MAINT	Corrective Maint.	06/26/17	4	HR	3.64	3973	FO	Firm Work Order W/Parts List
CORRECTIVE MAINTENAN	Corrective Maintenance	06/26/17	2	HR	1.82	3931	FO	Firm Work Order W/Parts List
Total for Period Ending		06/26/17	110	HR				
00110234	PM Fleet 250 & 500	06/30/17	4	HR		4191	FO	Firm Work Order W/Parts List
Total for Period Ending		06/30/17	4	HR				

52.5.7 What You Should Know About

Topic	Discussion
Period from and to dates	<p>The system uses the Period From and the Period To dates that you enter as follows:</p> <ul style="list-style-type: none"> ■ If you enter dates in both fields, the system prints the summary within that period. ■ If you enter a date in the Period To field only, the system prints the summary beginning with the current period. If you do not select a Period From date, the system prints the past due orders before the current date. ■ If you enter a date in the Period From field only, the system prints all items from that date onward. ■ If more than one order for an item has been scheduled at the work center for the same period, the system prints the item number once for each order on the report.

52.5.8 Processing Options

See Section 58.17, "Period Summary (P3352)"

52.6 Printing the Maintenance Log Report

Navigation

From Equipment/Plant Management (G13), choose Equipment/Plant Maintenance

From Equipment/Plant Maintenance (G1315), choose Maintenance Log

You can print the Maintenance Log report to review equipment messages based on message type. Message types are user defined (system 12, type EM) and might include:

- Problem messages
- Planned maintenance messages
- Actual maintenance messages

You can print four versions of this report:

- Reported Problems
- Planned Maintenance
- Actual Maintenance
- Problems versus Maintenance

The Maintenance Log report prints messages in the following sequence:

- Equipment number
- Date
- Time

The report includes cleared messages only if you use data selections to specify that you want those messages to appear. The report also includes messages with a tickler date (the date that the messages go into effect).

52.6.1 Item Log Report

Figure 52–5 Item Log - Reported Problems report

12450		JD Edwards World		Page	-	2
		Item Log		Date	-	4/30/17
		Reported Problems				
Item Number	Description	Message From	M T Operator	Date	Time	. . Tickler . . M or H Date
1001	AA9 Motor Grader	Mechanical Service	P DEMO01	11/12/17	16:19:47	11/12/17
	The operator ran over a piece of scrap galvanized pipe and took a big bite out of the front right tire. The tire is relatively new. Have McDonald Tire Service come out and install a temporary and give us an estimate for repair or replacement.					
1001	AA9 Motor Grader	Brake Department	P DEMO01	11/16/17	13:37:04	11/16/17
	See special message concerning checking of brakes at 1750-2000 hours.					
1001	AA9 Motor Grader	Brake Department	P DEMO01	11/16/91	13:28:39	1,750.00 12/31/17
	On this vehicle, be sure the brake pads are measured between 1750 and 2000 hours. The pads have been showing an excessive amount of wear and need monitoring closely when these number of hours are reached.					
1300	Backhoe, Caterpillar 426	Mechanical Service	P DEMO	04/05/17	13:17:16	04/05/17
	The operator ran over a piece of scrap galvanized pipe and took a big bite out of the front right tire. The tire is relatively new. Have McDonald Tire Service come out and install a temporary and give us an estimate for repair or replacement.					

See Also:

- [Chapter 6, "Work with Message Logs"](#) for information about entering equipment messages

52.6.2 Processing Options

See [Section 58.29, "Item Log - Actual Maintenance \(P12450\)"](#)

See [Section 58.30, "Item Log - Planned Maintenance \(P12450\)"](#)

See [Section 58.31, "Item Log - Problems vs Maintenance \(P12450\)"](#)

See [Section 58.32, "Item Log - Reported Problems \(P12450\)"](#)

52.7 Printing the Frequency of Occurrence Report

From the DREAM Writer menu (G81), choose Versions List.

Print the Frequency of Occurrences report to review the overall frequency of selected service types. This information is particularly useful when you need to review maintenance patterns by specific type of repair.

The report shows the service types you specify, the estimated and actual frequency of each service type, and the percentage of each service type for which maintenance has been fulfilled.

You can use processing options to specify a completed date range and limit the number of service types that the report includes.

Note: You can only access this report by using the following procedure: Enter P13419 in the Form field on Versions List. A versions list appears that contains a DEMO version of the report. You can run the DEMO version or copy and modify it to suit your needs. When you run a version, Processing Options Revisions appears before the system submits the report for processing.

52.7.1 Frequency of Occurrence Report

Figure 52–6 Frequency of Occurrence report

13419	JD Edwards World		Page: 2
	Frequency of Occurrence		Date: 4/30/16
Service	Estimated	Real	% Fulfillment
Service	Frequency	Frequency	
AIR/HEAT			
CHECK			
EMTIN			
FIRE			
GPMINT			
HALON			
INSMOTOR			
INSPECT			
LUBE			
OIL			
REBUILD			
TIRES			
VEHICLE			
WARMOTOR			
WASH			
WINDOW			
01-405			
08-125	.07		
08-130	.07		
08-150			
08-220	.07		
08-310	.42	1	2.00
1000			
12-315	.07		
250			
500			
Total	.70	1	1.00

See Also :

- *JD Edwards World Technical Foundation Guide* for information about running, copying, and changing DREAM Writer versions

52.7.2 Processing Options

See [Section 58.37, "Frequency of Occurrence \(P13419\)"](#)

52.8 Printing World Writer Reports

Navigation

From Equipment/Plant Management (G13), choose Equipment/Plant Maintenance

From Equipment/Plant Maintenance (G1315), choose World Writer

You can use World Writer reports to access information from all the tables on your system. You can create World Writer reports from any record or table in your database. JD Edwards World provides several predefined reports based on specific tables. The World Writer reports that are specific to PMs include:

- Percent Complete by Item
- Percent Complete by Unit
- Work Order Status History

Use these World Writer reports to review information about your PMs that is not available through other PM reports. You can change the fields and data selection on any of these reports.

World Writer uses the following tables from which to generate these reports:

- Status History (F1307)
- Maintenance Schedule (F1207)

52.8.1 Sample - Percent Complete by Item Report

Figure 52–7 Percent Complete Report

Percent Complete Report										1
Item Number	Description	Service Type	M S	M P	Assigned W/O#	Assigned To	Address Line 1	Last Completed Date	% Cmp	06/08/17
1492	Pump, Fuel - Gate A-2	CHECK	50		3105		** NOT FOUND **		999	
1505	Pump, Fuel - Gate A-3	CHECK	50		3121		** NOT FOUND **		999	
1513	Pump, Fuel - Gate A-4	CHECK	50		3148		** NOT FOUND **		999	
1530	Pump, Fuel - Gate A-6	CHECK	50		3164		** NOT FOUND **		999	
1548	Pump, Fuel - Gate A-7	CHECK	50		3181		** NOT FOUND **		999	
1556	Pump, Fuel - Gate A-8	CHECK	50		3201		** NOT FOUND **		999	
1388	Scrapper, Auger, CAT 651E	1000	50	M	2655		** NOT FOUND **		500	
1300	Backhoe, Caterpillar 426	1000	50				** NOT FOUND **	01/01/17	399	
1001	AA9 Motor Grader	250	99	2	1960	6003 Dwight Akin			326	
1001	AA9 Motor Grader	500	50	2	1978	6003 Dwight Akin			163	
1040	Caterpillar Grader, 140G 2017	250	50	2	1994	5274 John Jackson, Jr.			140	
1022	Honda Accord	VEHICLE	50	2	1986	6005 Mr. Fred Ellis			125	
1042	Caterpillar Crawler, 2016	250	50	2	2006	2049 Mr. Rod McLind			120	
1006	Office Building	HALON	50	L		** NOT FOUND **		10/01/17	111	
1006	Office Building	AIR/HEAT	50	L		** NOT FOUND **			100	
1006	Office Building	EXTIN	50	L		** NOT FOUND **			100	
1006	Office Building	FIRE	50	L		** NOT FOUND **			100	
1300	Backhoe, Caterpillar 426	INSPECT	50	H	2663		** NOT FOUND **		100	
1329	Truck, Pickup, Ford	INSPECT	50	H	3084		** NOT FOUND **		100	
1388	Scrapper, Auger, CAT 651E	INSPECT	50	H	2655		** NOT FOUND **		100	
1468	Pump, Fuel - Gate A-1	GPMAINT	50		3092		** NOT FOUND **		100	
1492	Pump, Fuel - Gate A-2	GPMAINT	50		3113		** NOT FOUND **		100	
1505	Pump, Fuel - Gate A-3	GPMAINT	50		3130		** NOT FOUND **		100	
1513	Pump, Fuel - Gate A-4	GPMAINT	50		3156		** NOT FOUND **		100	
1530	Pump, Fuel - Gate A-6	GPMAINT	50		3172		** NOT FOUND **		100	
1548	Pump, Fuel - Gate A-7	GPMAINT	50		3199		** NOT FOUND **		100	
1556	Pump, Fuel - Gate A-8	GPMAINT	50		3210		** NOT FOUND **		100	
2049	Truck, Pickup, Ford	INSPECT	50	H	3228		** NOT FOUND **		100	
2053	Backhoe, Caterpillar 416	INSPECT	50	H	3236		** NOT FOUND **		100	
1018	Ace Truck, 3/4 Ton Panel	VEHICLE	01	2		** NOT FOUND **			84	
1006	Office Building	WINDOW	01	L		** NOT FOUND **		10/01/17	83	
1001	AA9 Motor Grader	1000	01	1		** NOT FOUND **			81	
1040	Caterpillar Grader, 140G 2017	500	01	2		** NOT FOUND **			70	
1042	Caterpillar Crawler, 2016	500	01	2		** NOT FOUND **			60	
1468	Pump, Fuel - Gate A-1	CHECK	01			** NOT FOUND **		01/05/17	57	
1040	Caterpillar Grader, 140G 2017	1000	01	2		** NOT FOUND **			35	
1042	Caterpillar Crawler, 2016	1000	01	2		** NOT FOUND **			30	
1388	Scrapper, Auger, CAT 651E	250	50	M	2655		** NOT FOUND **	01/01/17	27	
1300	Backhoe, Caterpillar 426	250	50			** NOT FOUND **		01/01/17	23	
1388	Scrapper, Auger, CAT 651E	500	50	M	2655		** NOT FOUND **	01/01/17	13	
1300	Backhoe, Caterpillar 426	500	50	M	2639		** NOT FOUND **	01/01/17	11	

52.8.2 Sample - Work Order Status History Report

Figure 52-8 W.O. Status History Report

W.O. Status History Report									1
W.O. Number	Description	WO St	Begin Date	Beg Time	Ending Date	End Time	Status Hours	Cumulative Hours	06/08/17
1211	Test SAR #752456	10	05/09/17						
1871	Model WO - 250 HR Maint Proc		01/01/17	1020					
1871	Model WO - 250 HR Maint Proc	MA	01/01/17	741	01/01/17	1020	2.65		
1880	Model WO - 500 HR Maint Proc		01/01/17	1020					
1880	Model WO - 500 HR Maint Proc	MA	01/01/17	742	01/01/17	1020	2.63		
1898	Model WO - 1000 HR Maint Proc		01/01/17	1020					
1898	Model WO - 1000 HR Maint Proc	MA	01/01/17	741	01/01/17	1020	2.65		
1960	250 HR Maint-AA9 Motor Grader	MA	01/01/17	900					
1978	500 HR Maint-AA9 Motor Grader	MA	01/01/17	914					
1986	Honda Accord 3000 mile maint	MA	01/01/17	920					
1994	250 HR Maint-1986 140G Grader	MA	01/01/17	923					
2006	250 HR Maint Proc	MA	01/01/17	925					
2305	Safety Inspection		01/01/17	1020					
2305	Safety Inspection	MA	01/01/17	742	01/01/17	1020	2.63		
2305	Safety Inspection	M	09/23/17		01/01/17	742	37,471.70		
2318	Oil Change	M	09/23/17						
2327	Rotate Tires		01/01/17	1021					
2327	Rotate Tires	MA	01/01/17	742	01/01/17	1021	2.65		
2327	Rotate Tires	M	09/23/17		01/01/17	742	37,471.70		
2487	Replace Pump Motor	MA	10/07/17	1318				10.90	
2487	Replace Pump Motor	MF	10/07/17	1055	10/07/17	1318	2.38		
2487	Replace Pump Motor	MR	10/07/17	1054	10/07/17	1055	.02		
2487	Replace Pump Motor	MA	10/07/17		10/07/17	1054	10.90		
2663	Safety Inspection	MA	01/01/17	955					
2671	1000 HR Maint Proc	MA	01/01/17	944					
3025	Gate Pump Preventive Maint.		01/01/17	1021					
3033	Daily Inspection		01/01/17	1022					
3041	Model WO - 1000 HR Maint Proc		01/01/17	717					
3050	Model WO - 500 HR Maint Proc	MA	01/01/17	743					
3068	Model WO - 250 HR Maint Proc	M	01/01/17	719					
3068	Model WO - 250 HR Maint Proc	MA	01/01/17	713	01/01/17	719	.10		
3252	Brake repair	99	10/15/17	931					
3308	broken hydraulic line	45	10/15/17						
3455	Repair Motor	MA	11/18/17						

Part VII

Processing Options

This part contains these chapters:

- [Chapter 53, "Equipment Information Processing Options"](#)
- [Chapter 54, "Preventive Maintenance Cycle Processing Options"](#)
- [Chapter 55, "Work Order Life Cycle Processing Options"](#)
- [Chapter 56, "Maintenance Planning Processing Options"](#)
- [Chapter 57, "Setup Processing Options"](#)
- [Chapter 58, "Advanced & Technical Processing Options"](#)

Equipment Information Processing Options

This chapter contains these topics:

- [Section 53.1, "Item Master Information \(P1201\)"](#)
- [Section 53.2, "Equipment Search Display Format \(P1204\)"](#)
- [Section 53.3, "Item Message Entry - Actual \(P1205\)"](#)
- [Section 53.4, "Item Message Entry - Planned \(P1205\)"](#)
- [Section 53.5, "Item Message Entry - Problem \(P1205\)"](#)
- [Section 53.6, "Permit and License Tracking \(P1206\)"](#)
- [Section 53.7, "Assembly Components and NBV \(P12011\)"](#)
- [Section 53.8, "Parent History Information \(P12212\)"](#)
- [Section 53.9, "Location Inquiry \(P12215\)"](#)
- [Section 53.10, "Cost Summary by Account Code \(P122101\)"](#)
- [Section 53.11, "Cost Summary by Repair Code \(P122101\)"](#)
- [Section 53.12, "Account Balance Comparison \(P092121\)"](#)
- [Section 53.13, "Revise Unposted Entries \(P12102\)"](#)
- [Section 53.14, "Unposted F/A Transactions \(P12301\)"](#)
- [Section 53.15, "Post Unposted F/A Entries \(P12800\)"](#)
- [Section 53.16, "Location Tracking Z File \(P12115Z\) \(Release A9.3 Update\)"](#)

53.1 Item Master Information (P1201)

Processing Option	Processing Options Requiring Further Description
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DEFAULT OPTIONS:

1. Enter a '1' to default the cost account information from the parent item when adding children items.

REQUIRED FIELD OPTIONS:

2. Enter a '1' to require the Location to be entered.

Enter a '2' to default location from Responsible Business Unit and Start Date from Date Acquired if left blank.

Default of blank will not require the entry of either.

Processing Option	Processing Options Requiring Further Description
3. Enter a '1' to require the entry of a Unit Number when doing an add.	
4. Enter a '1' to require the entry of Category Code Information when adding an Item Master.	
5. Enter a '1' to require the entry of AFE field.	
PROTECTED FIELD OPTIONS:	
6. Enter a '1' to prevent entry/ change to the Date Disposed.	
7. Enter a '1' to prevent entry/ change to the Equipment Status.	
8. Enter a '1' to prevent entry/ change to the Accounting Class, Category Code 1.	
9. Enter a '1' to prevent entry/ to the Depreciation Category Code.	This refers to the Category Code that is designated as the Depreciation Category Code in the Fixed Assets Constants.
10. Enter a '1' to not allow a child asset to be added to a disposed asset.	
DEFAULT WARNING:	
11. Enter a '1' to receive an error if exact Ledger Depreciation Rules information (F12003) is not found.	
Leave blank to receive a warning if exact Ledger Depreciation Rules information is not found.	

53.2 Equipment Search Display Format (P1204)

Processing Option	Processing Options Requiring Further Description
FORMAT CONTROL:	
1. Enter a '1' to display the Equipment Management screen format.	
Leave blank (default) to display the Fixed Asset screen format.	
DW VERSION SELECTIONS:	
2. Enter the DREAM Writer version of the Scheduling Workbench (P48201) to call when the related option exit is used.	
Leave blank to call version ZJDE0001.	
3. Enter the DREAM Writer version of the Component Cost and NBV (P12011) screen to call.	
Leave blank (default) to call version ZJDE0001.	
4. Enter the DREAM Writer version of the Asset Master (P1201) to call.	
Leave blank to call version ZJDE0001.	
5. Enter the DREAM Writer version of the Location Inquiry (P12215) to call.	
Leave blank to call version ZJDE0001.	

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
Enter the default for the Category Code selections. Blanks will select all.	
6. Major Accounting Class	
7. Major Equipment Class	
8. Manufacturer	
9. Category Code 4	
10. Category Code 5	
11. Category Code 6	
12. Category Code 7	
13. Category Code 8	
14. Category Code 9	
15. Category Code 10	

53.3 Item Message Entry - Actual (P1205)

Processing Option	Processing Options Requiring Further Description
MESSAGE TYPE SELECTION:	
1. Enter the Equipment Message Type to process (1 character only).	
Examples:	
'P' - Problem Report	
'S' - Planned Maintenance	
'A' - Actual Maintenance	
DREAM WRITER VERSION:	
Enter the version for each program:	
If left blank, ZJDE0001 will be used.	
2. Master Information (P1201)	

53.4 Item Message Entry - Planned (P1205)

Processing Option	Processing Options Requiring Further Description
MESSAGE TYPE SELECTION:	
1. Enter the Equipment Message Type to process (1 character only).	
Example:	
'P' - Problem Report	
'S' - Planned Maintenance	
'A' - Actual Maintenance	
DREAM WRITER VERSION:	

Processing Option**Processing Options Requiring Further Description**

Enter the version for each program:
If left blank, ZJDE0001 will be used.

2. Master Information (P1201)

53.5 Item Message Entry - Problem (P1205)

Processing Option**Processing Options Requiring Further Description**

MESSAGE TYPE SELECTION:

1. Enter the Equipment Message Type to process (1 character only).

Example:

'P' - Problem Report

'S' - Planned Maintenance

'A' - Actual Maintenance

DREAM WRITER VERSION:

Enter the version for each program:
If left blank, ZJDE0001 will be used.

2. Master Information (P1201)

53.6 Permit and License Tracking (P1206)

Processing Option**Processing Options Requiring Further Description**

DREAM WRITER VERSION:

Enter the version for each program:
If left blank, ZJDE0001 will be used.

1. Master Information (P1201)

53.7 Assembly Components and NBV (P12011)

Processing Option**Processing Options Requiring Further Description**

FORMAT CONTROL:

1. Enter a '1' to display the Equipment Management screen format.

Leave blank (default) to display the Fixed Asset screen format.

2. Enter a '1' to display amounts to billions without commas.

Leave blank to display amounts to billions with commas.

DEFAULT VALUES:

3. Enter a default Item Number.

4. Enter a default display level.

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
Enter the version for each program:	
If left blank, ZJDE0001 will be used.	
5. Master Information (P1201)	
6. Location Inquiry (P12215)	
7. Backlog Management (P48201)	
8. Cost Summary (P122101)	

53.8 Parent History Information (P12212)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSION:	
Enter the version for each program:	
If left blank, ZJDE0001 will be used.	
1. Master Information (P1201)	

53.9 Location Inquiry (P12215)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSION:	
1. Enter the DREAM Writer version of the Asset Master to call.	
Leave blank to call version ZJDE0001.	

53.10 Cost Summary by Account Code (P122101)

Processing Option	Processing Options Requiring Further Description
DISPLAY SEQUENCE SELECTION:	
1. Enter a '1' to display Asset in Repair Code (Subsidiary) sequence.	
Leave blank (default) to display in Account Code (Object) sequence.	
FORMAT CONTROL:	
2. Enter a '1' to display amounts to billions without commas.	
Leave blank to display amounts to millions with commas.	
3. Enter a '1' to display larger amount fields and the account number in the fold area only.	
Leave blank to display the account and smaller amount fields.	
DW VERSION SELECTION:	

Processing Option	Processing Options Requiring Further Description
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4. Enter the DREAM Writer version of the Order Inquiry (P430301) to call when the related option exit is used.

Leave blank to call version ZJDE0006.

53.11 Cost Summary by Repair Code (P122101)

Processing Option	Processing Options Requiring Further Description
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DISPLAY SEQUENCE SELECTION:

1. Enter a '1' to display Asset in Repair Code (Subsidiary) sequence.

Leave blank (default) to display in Account Code (Object) sequence.

FORMAT CONTROL:

2. Enter a '1' to display amounts to billions without commas.

Leave blank to display amounts to millions with commas.

3. Enter a '1' to display larger amount fields and the account number in the fold area only.

Leave blank to display the account and smaller amount fields.

DW VERSION SELECTION:

4. Enter the DREAM Writer version of the Order Inquiry (P430301) to call when the related option exit is used.

Leave blank to call version ZJDE0006.

53.12 Account Balance Comparison (P092121)

Processing Option	Processing Options Requiring Further Description
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LEDGER TYPES AND COLUMN HEADINGS:

1. Enter the ledger type for column 1.

Leave blank for default ledger type 'BA' - Budget Amount.

2. Enter the User Defined Code value for column heading 1.

UDC table 14/CH will be used for this search.

Note: The column heading that appears on the screen is the description that is assigned to the user defined code you specify.

3. Enter the ledger type for column 2.

Leave blank for default ledger type 'AA' - Actual Amount.

Processing Option	Processing Options Requiring Further Description
4. Enter the User Defined Code value for column heading 2.	<p>UDC table 14/CH will be used for this search.</p> <p>Note: The column heading that appears on the screen is the description that is assigned to the user defined code you specify.</p>
LEDGER COMPARISON CALCULATION:	<p>5. Select one of the following for column 3 calculation:</p> <p>1 = Column 1 - Column 2 (Default)</p> <p>2 = Column 1 / Column 2</p> <p>3 = Column 1 x Column 2</p> <p>4 = Column 1 + Column 2</p> <p>This option applies only to the three column screen format.</p>
6. When using the three column screen format, enter the number of decimals to use when displaying column 3.	<p>Default of blank will use the company decimal positions. If a scaling factor is used, it will override this option.</p>
DATA SEQUENCING:	<p>7. Enter a '1' to sequence by Business Unit, Subsidiary. (Note: This option will not work if you are using the Flex Chart of Accounts).</p> <p>Default of blank will sequence by Business Unit, Object.</p>
DEFAULT PROCESSING:	<p>8. Enter the Level of Detail to be displayed.</p> <p>Default of blank will use the value from the Data Dictionary.</p>
9. Enter the sequence numbers (1-3) to indicate the order in which formats will appear.	<p>If all are left blank they will appear in default order:</p> <p>Two Column Format</p> <p>Three Column Format</p> <p>Four Column Format</p> <p>Note: For the four-column format, the ledger type and heading for columns 1 and 3 are the same as those for column 1, and columns 2 and 4 are the same as those for column 2 on the two and three-column format.</p>
10. Enter the scaling factor to be used on displayed amounts.	<p>Default of blank will use the value from the Data Dictionary.</p>
11. Enter a '1' to display the Account Number with the Account Description in the fold area.	<p>Leave blank to display the Account Description with the Account Number in the fold area.</p>
12. Enter a '1' to display amounts without commas.	<p>Leave blank to display amounts with commas.</p>

Processing Option	Processing Options Requiring Further Description
13. Enter a '1' to omit displaying accounts with zero balances.	

53.13 Revise Unposted Entries (P12102)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTION:	
1. Enter a '1' to display amounts to billions without commas. Leave blank to display amounts to millions with commas.	
UPDATE OPTION:	
2. Enter '1' to allow posting of cost to a different account than defined in the Asset Master. Leave blank (default) to prevent posting of cost to a different account than Asset Master.	
DREAM WRITER VERSIONS:	
3. Enter the DREAM Writer version of the Item Master (P1201) to call when the related option exit is used. Leave blank (default) to call version ZJDE0001.	
4. Enter the DREAM Writer version of the Order Inquiry (P430301) to call when the related function key is used. Leave blank (default) to call version ZJDE0006.	
AU LEDGER OPTION:	
5. Enter '1' to prevent the creation of the units ledger if units are present in the journal entry.	

53.14 Unposted F/A Transactions (P12301)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTION:	
1. Identify how to print Asset Number. 1 = Item Number (DEFAULT) 2 = Unit Number 3 = Serial Number	
2. Identify how to print the Amount. blank = Amount w/ commas (DEFAULT) 1 = Amount w/o commas	

53.15 Post Unposted F/A Entries (P12800)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTION:	

Processing Option	Processing Options Requiring Further Description
<p>1. Identify how to print Asset Number.</p> <p>1 = Item Number (DEFAULT)</p> <p>2 = Unit Number</p> <p>3 = Serial/Tag Number</p>	
<p>2. Identify how to print the Amount.</p> <p>blank = Amount w/ commas (DEFAULT)</p> <p>1 = Amount w/o commas</p>	
UPDATE OPTIONS:	
<p>3. Enter a '1' to use the asset number from the subledger type 'E' when the G/L asset number is blank.</p> <p>Leave blank to use the G/L asset number only when posting to Fixed Assets.</p>	
<p>4. Enter '1' to allow the posting of cost to a different account than defined in the Asset Master.</p> <p>Leave blank (default) to prevent posting of cost to a different account defined in the Asset Master.</p>	
AU LEDGER OPTION:	
<p>5. Enter '1' to prevent the creation of the units ledger if units are present in the journal entry.</p>	

53.16 Location Tracking Z File (P12115Z) (Release A9.3 Update)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
<p>1. Enter the version to be used to call Transfer Processing (P12115).</p> <p>If left blank, ZJDE0001 will be used.</p>	
ERROR REPORTING:	
<p>2. Enter '1' to skip printing the error report.</p> <p>If left blanks, the report will print.</p>	
<p>3. Enter the version to be used to call the error report program (P41ZERR).</p> <p>If left blank, XJDE0013 will be used.</p>	

Preventive Maintenance Cycle Processing Options

This chapter contains these topics:

- Section 54.1, "Item PM Schedule (P1207)"
- Section 54.2, "Odometer Reading Update (P12120)"
- Section 54.3, "Meter Reading Estimates (P1306)"
- Section 54.4, "Update Meter Estimates (P13806)"
- Section 54.5, "Set Maintenance Status for Scheduled Maintenance (P12807)"
- Section 54.6, "Completed Maintenance (P12071)"
- Section 54.7, "Meter Reading Z File (P12120Z) (Release A9.3 Update)"

54.1 Item PM Schedule (P1207)

Processing Option	Processing Options Requiring Further Description
DEFAULT OPTIONS:	
1. Enter a '1' to calculate the estimated occurrence based on one year of history.	
Enter a '2' to calculate the estimated occurrence based on two years of history.	
Enter a '3' to calculate the estimated occurrence based on history from inception to date.	
Leave blank (Default) to not calculate the occurrence.	
INTERACTIVE PM SCHEDULE UPDATE OPTION:	
2. Enter the DREAM Writer version of the PM Update program (P12807) to run when using the option to create a work order.	
Leave blank to use version XJDE0001.	
INTERACTIVE EQUIPMENT WORK ORDER OPTION:	

Processing Option	Processing Options Requiring Further Description
3. Enter the DREAM Writer version of the Equipment Work Order Entry program (P48011) to run when using the option to enter Model Work Orders.	
4. Enter the Dream Writer version of the Item Search and Location program (P1204) to run when F1 key is pressed on the Item Number Field.	

54.2 Odometer Reading Update (P12120)

Processing Option	Processing Options Requiring Further Description
ACCOUNT DISPLAY OPTION:	
1. Select which statistical account you want to display on the screen first.	
Enter a '1' for Hours (AT00)	
'2' for Miles (FMB)	
'3' for Fuel (FMA)	
PARENT/CHILD UPDATE OPTIONS:	
2. Enter a '1' to automatically update current meters of "child" assets when updating the parent's current meter.	
3. Enter a '1' to update the original meter of children when updating the original meter of the parent. The original meter of the child will be affected only if BOTH the parent and the child have NO original meter readings.	
Leave blank to cause the parent's original reading NEVER to affect the child's original reading.	
INTERACTIVE PM SCHEDULE UPDATE OPTION:	
4. Enter the DREAM Writer version of the PM Update program (P12807) to run automatically when updating meters.	
Leave blank to update meters without automatically updating PM Schedules.	
TOLERANCE LEVELS:	
5. Enter the percent difference in meter readings to signal a soft error.	
Blanks will not check.	

54.3 Meter Reading Estimates (P1306)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTIONS:	
1. Choose which meter to display on the screen:	
'1' = Estimated Fuel Meter (FMA).	
'2' = Estimated Odometer (FMB).	
Blank = Estimated Hour Meter (AT00) (default).	

54.4 Update Meter Estimates (P13806)

Processing Option	Processing Options Requiring Further Description
UPDATE OPTIONS:	
1. Choose one of the following statistical accounts to update:	
'1' = Fuel Meter (FMA).	
'2' = Mileage Meter (FMB).	
Blank = Hour Meter (AT00) (default).	
2. Enter a '1' to automatically update the meter reading of "child" assets when updating the "parent" asset.	
PRINT OPTION:	
3. Enter a '1' to print a report of the assets updated.	
Leave blank to print no report.	
G/L DATE SELECTION:	
4. Enter the G/L date to be used when updating the Account Ledger file (F0911) and the Item Balances file (F1202).	
If left blank, the system date will be used as the G/L Date.	

54.5 Set Maintenance Status for Scheduled Maintenance (P12807)

Processing Option	Processing Options Requiring Further Description
THROUGH DATE SELECTION:	
1. Enter the date through which to check for status changes.	
Leave blank (default) to use the system date as the through date.	
SELECT STATUS RANGE FOR SCHEDULING:	

Processing Option	Processing Options Requiring Further Description
<p>2. Enter the status range to check in determining if items are ready to be scheduled for maintenance.</p> <p>Leave blank to use the default value for Data Dictionary Item 'MSTS'.</p> <p>From:</p> <p>Thru:</p>	
<p>3. Enter the value of the status that the PM will change to.</p> <p>Leave blank to use the status from the Maintenance Rules.</p>	
<p>PRINT OPTIONS:</p>	
<p>4. Enter '1' to print a report showing all changes and updates.</p> <p>Leave blank (default) to print no report.</p>	
<p>5. Choose how to print the asset number:</p> <p>'1' = Item Number (default)</p> <p>'2' = Unit Number.</p> <p>'3' = Serial Number.</p>	
<p>WORK ORDER OPTIONS:</p>	
<p>6. Enter a '1' to create a work order for qualifying maintenance items with model work order numbers.</p>	
<p>7. Enter one of the following for the work order start date.</p> <p>Leave all blank for no work order start date.</p> <p>a. Enter the start date.</p> <p>b. Enter a '1' to default the system date as the start date.</p> <p>c. Enter a '1' to project the PM and WO start date.</p>	
<p>8. Select the value for the work order cross-reference.</p> <p>' ' = equipment's immediate parent</p> <p>'1' = equipment's top level parent</p> <p>'2' = value from model work order</p>	
<p>UPDATE OPTION:</p>	
<p>9. Enter a '1' to update the "Last Completed" statistics as of the "Last Completed" date for ALL records selected.</p> <p>(Caution - Use DREAM Writer selection of non-complete records to avoid excessive processing time!)</p>	

Processing Option	Processing Options Requiring Further Description
<p>10. Enter a work center to only generate work orders that involve a certain craft or skill group. This inhibits work order generation for Service Types that have come due but whose model work order does not involve the specified work center in its routing.</p> <p>Default of blank will not perform screening based on work center.</p>	
CALCULATION OPTIONS:	
<p>11. Enter a '1' to calculate the estimated occurrence based on one year of history.</p> <p>Enter a '2' to calculate the estimated occurrence based on two years of history.</p> <p>Enter a '3' to calculate the estimated occurrence based on history from inception to date.</p> <p>Leave blank (Default) to not calculate the occurrence.</p>	
PROJECTED START DATE FOR WORK ORDERS:	
<p>12. Select a method of projection.</p> <p>' ' = Sampling Days</p> <p>'1' = Sampling Readings</p> <p>'2' = Percent Due</p>	
<p>13. Enter a number of days/readings to retrieve from Account Ledger F0911.</p> <p>Blank defaults 365 days using Sampling Days, or 5 readings using Sampling Readings.</p>	
<p>14. Select a From Projection Date.</p> <p>' ' = Last Completed Date</p> <p>'1' = Thru Date from Proc. Option 1</p>	
<p>15. Select if the projected start date can be a date that is less than the system date or not.</p> <p>' ' = Do not allow dates in the past</p> <p>'1' = Allow dates in the past</p>	
FORCE WORK ORDERS FOR ASSOCIATIONS:	
<p>16. Enter '1' to not create work orders for associated service types.</p> <p>Leave blank (Default) to create work orders.</p>	

54.6 Completed Maintenance (P12071)

Processing Option	Processing Options Requiring Further Description
RANGE DEFAULT SELECTIONS:	

Processing Option	Processing Options Requiring Further Description
1. Enter the service type range to default on the screen. From: Thru:	
2. Enter the status range to default on the screen. From: Thru:	
METER DISPLAY: 3. Enter a '1' to display current meter readings. Leave blank (default) to display lifetime maintenance amounts. FORMAT DISPLAY:	
4. Enter a '1' to display screen format with Projected Start Date on the first detail line. Leave blank to display format with Completed Meters on the first detail line. UPDATE OPTIONS:	
5. Enter a '1' to update the completed date on the assigned work order.	
6. Enter a '1' to update the status on the assigned work order.	
7. Enter a '1' to update Meter Readings from this screen. Leave blank to update PM Last Completed statistics only.	

54.7 Meter Reading Z File (P12120Z) (Release A9.3 Update)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
1. Enter the version to be used to call Meter Readings (P12120). If left blank, ZJDE0001 will be used.	
ERROR REPORTING:	
2. Enter '1' to skip printing the error report. If left blanks, the report will print.	
3. Enter the version to be used to call the error report program (P41ZERR). If left blank, XJDE0013 will be used.	

Work Order Life Cycle Processing Options

This chapter contains these topics:

- Section 55.1, "Equipment Work Order Entry (P48011)"
- Section 55.2, "Default Values for Speed Project Setup (P48015)"
- Section 55.3, "Work Order Approval (P4828)"
- Section 55.4, "Equipment Scheduling Workbench (P13220)"
- Section 55.5, "Equipment Work Order Print (P48425)"
- Section 55.6, "Job Status Inquiry (P512000)"
- Section 55.7, "Work Order Inventory Issues (P31111)"
- Section 55.8, "Equipment and Subledger Inventory Issues (P4112)"
- Section 55.9, "Simple Inventory Issues (P4112)"
- Section 55.10, "Work Order (Subledger) Inventory Issues (P4112)"
- Section 55.11, "Time Entry by Individual (P051121)"
- Section 55.12, "Time Entry by Job (Business Unit) (P051161)"
- Section 55.13, "Parts List Inquiry (P1321)"
- Section 55.14, "Budget to Actual Variance (P48218)"
- Section 55.15, "Scheduling Workbench - Equipment Entry (P48201)"
- Section 55.16, "General Ledger Post (P09800)"

55.1 Equipment Work Order Entry (P48011)

Processing Option	Processing Options Requiring Further Description
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WORK ORDER DEFAULTS:

1. Enter the Defaults for the following:

Type

Priority

Phase or Matter (Cat. Code 1)

Category Code 2

Category Code 3

2. Enter a '1' to default the Manager and Supervisor based on the values for Category Codes 1, 2, and 3.

Processing Option	Processing Options Requiring Further Description
3. Enter the default Work Order Type	
4. Enter the Category Code defaults:	
Category Code 4	
Category Code 5	
Category Code 6	
Category Code 7	
Category Code 8	
Category Code 9	
Category Code 10	
5. Enter the Address Book defaults:	
Manager	
Customer	
Assigned To	
Originator	
Supervisor	
6. Enter a '1' to require the entry of the Manager address	
field.	
7. Enter a '1' to require the entry of the Planner address	
field.	
8. Enter a '1' to require the entry of the Assigned To	
address field.	
9. Select the value for the work order cross-reference:	
' ' = equipment's immediate parent	
'1' = equipment's top level parent	
'2' = value from parent work order	
10. Enter a '1' to default the Standard Parts List from the	
Equipment.	
Leave blank to not default the Standard Parts List.	
WORK ORDER EDITS:	
11. Enter a '1' to automatically change the start date and	
requested date on the parts and routings when they	
change on the work order.	
Leave blank to not update the parts and routings	
automatically.	
12. Enter a '1' to require an equipment number to be	
entered.	
Leave blank to not require an equipment number	
13. Enter a '1' to give a soft warning when the business	
unit entered does not match the business unit associated	
with the equipment number.	
14. Enter a '1' to give a soft warning for the date edits.	
Enter a '2' to give a hard warning for the date edits.	
Leave blank (DEFAULT) to accept all dates entered.	

Processing Option	Processing Options Requiring Further Description
<p>15. Enter the status that a Work Order must be equal to or less than to be current.</p> <p>If a status is entered a soft warning will be given when entering a new Work Order and current Work Orders exist for the referenced piece of equipment.</p>	
<p>16. Enter the Purchase Order Status below which are active orders and a soft warning will be given when completing a work order.</p> <p>Leave blank to give no warnings about active purchase orders when completing a work order.</p>	
<p>17. Enter the work order approval type to be used in the approval process.</p> <p>DREAM WRITER VERSIONS:</p>	
<p>18. Enter the DREAM Writer version of the Work Order Print (P48425) to call.</p> <p>Leave blank to call version XJDE0001.</p>	
<p>19. Enter the DREAM Writer version of the Work Order Parts List (P1311) to call.</p> <p>Leave blank to call version ZJDE0001.</p>	
<p>20. Enter the DREAM Writer version of the Equipment Work Order Routing Instructions (P1312) to call.</p> <p>Leave blank to call version ZJDE0001.</p>	
<p>21. Enter the DREAM Writer version of the Equipment Master (P1201) to call.</p> <p>Leave blank to call version ZJDE0001.</p>	
<p>WORK ORDER EDITS:</p> <p>22. Enter a '1' to default system date as the start date.</p>	

55.2 Default Values for Speed Project Setup (P48015)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT PROCESSING:</p> <p>1. Enter a '1' to default the manager and supervisor based on the values for Category Codes 1, 2, and 3.</p> <p>2. Enter the defaults for the following fields:</p> <p>Type</p> <p>Priority</p> <p>Beginning Status</p> <p>Phase (Category Code 1)</p> <p>Category Code 2</p> <p>Category Code 3</p>	
<p>PROGRAM SELECTION:</p>	

Processing Option	Processing Options Requiring Further Description
3. Choose the work order entry program to call when the option exit is used:	
'2' = Equipment Work Order (P48011)	
'3' = Work Order Entry (SAR) (P48012)	
'4' = Manufacturing Work Order (P48013) (default)	
'5' = Project Task Details (P48014)	

55.3 Work Order Approval (P4828)

Processing Option	Processing Options Requiring Further Description
DEFAULTS:	
1. Enter the default Document Type for the screen to inquire on.	
2. Enter the default Work Order Type for the screen to inquire on.	
3. Enter the default Approval Type for the screen to inquire on.	

55.4 Equipment Scheduling Workbench (P13220)

Processing Option	Processing Options Requiring Further Description
DEFAULT PROCESSING:	
1. Enter a Work Order Status range if you want to default values into the Status fields on the screen. Leave blank for no default.	
a. From Status:	
b. To Status:	
2. Enter the default for the Category Code selections. Leave blank to select all.	
a. Major Accounting Class	
b. Major Equipment Class	
c. Manufacturer	
d. Category Code 4	
e. Category Code 5	
f. Category Code 6	
g. Category Code 7	
h. Category Code 8	
i. Category Code 9	
j. Category Code 10	
DREAM WRITER VERSION SELECTION:	
3. Enter the Order Inquiry (P430301) DREAM Writer version to call when the appropriate function key is selected.	

Processing Option	Processing Options Requiring Further Description
4. Enter the DREAM Writer version of the Equipment Master (P1201) to call. Leave blank to call version ZJDE0001.	
5. Enter the DREAM Writer version of the Work Order Entry (P48011) to call. Leave blank to call version ZJDE0001.	
6. Enter the DREAM Writer version of the Backlog (P48201) to call. Leave blank to call version ZJDE0002.	
FORMAT CONTROL:	
7. Enter a '1' to display work order information first. Leave blank to display equipment number first.	

55.5 Equipment Work Order Print (P48425)

Processing Option	Processing Options Requiring Further Description
PRINT OPTIONS:	
1. Enter a '1' to print the Parts List Information on a new page. Leave blank (default) to print it without page breaking.	
2. Enter a '1' to print the Routing Instructions on a new page. Leave blank (default) to print it without page breaking.	
3. Enter a '1' to print the Standard Description Text on a new page. Leave blank (default) to print it without page breaking.	
4. Enter a '1' to omit printing the W.O. header information with the parts and routings. Leave blank (default) to print the W.O. header information with the parts and routings.	
5. Enter a '1' to suppress the printing of the dates associated with the work order record type information.	
6. Enter a '1' to print Specification Data associated with the piece of equipment on the work order. Leave blank to not print.	
7. Enter a '1' to print Supplemental Data associated with the work order. Leave blank to not print.	
8. Enter the Record Types to be printed with the work order. List them one after the other on the same line. The "A" Record Type will always print.	
9. Enter a '1' to suppress the printing of the estimated hours associated with the work order. Leave blank to print the estimated hours.	

Processing Option	Processing Options Requiring Further Description
10. Enter a '1' to print Equipment Messages associated with the piece of equipment on the work order. Leave blank to not print.	
PICK LIST PRINT:	
11. Enter the version of the Pick List report (P31415) to print. Leave blank to not print the Pick List	
W.O. STATUS UPDATE OPTION:	
12. Enter a new status if you want to update the Work Orders' status. Leave blank (default) for no update of the Work Orders' status field. Note: This option will update all statuses of Work Orders selected by DREAM Writer.	

55.6 Job Status Inquiry (P512000)

Processing Option	Processing Options Requiring Further Description
DEFAULT DISPLAY OPTIONS:	
1. Enter the account sequence to display: "1" = Account Category Code 1 "2" = Account Category Code 2 "3" = Account Category Code 3 "A" = Alternate Cost Code Blank = Cost Code Sequence (default)	
2. Enter the Cost Code range to display: a. From Cost Code: b. Thru Cost Code:	
3. Enter the Cost Type Range to display: a. From Cost Type: b. Thru Cost Type: NOTE: Leave ranges blank to include all Cost Codes and Cost Types.	
4. Enter a "1" to restrict inquiry to the account ranges specified above. Leave blank to allow inquiry on all accounts.	
5. To designate a default inquiry format or path, enter ONE of the following: a. The default inquiry FORMAT: -OR- b. The default inquiry PATH:	
6. Enter "1" to display the account number and Unit of Measure in the Description column. Leave blank to display the account description.	

Processing Option	Processing Options Requiring Further Description
7. Enter "1" to display the Level of Detail in the last column. Leave blank to display the Method of Computation.	
DW VERSION SELECTION:	
8. Enter the Scheduling Workbench (P48201) DREAM Writer version for the related option selection.	
Default is version "ZJDE0001".	

55.7 Work Order Inventory Issues (P31111)

Processing Option	Processing Options Requiring Further Description
UPDATE INFORMATION:	
1. Enter the Document Type associated with an Inventory Issue.	
2. Enter a Status Code for update to the Work Order Header.	
Leave blank to not update the work order status.	
FULL ISSUE:	
PARTIAL ISSUE:	
3. Enter a '1' to default the Work Order Number into the Subledger Field.	
Leave blank to not default the Subledger.	
4. Enter a '1' to default the Project Number for Inventory charges.	
Leave blank to default Business Unit for Inventory charges.	
INQUIRY INFORMATION:	
5. Enter a '1' to display only valid Issue Type Codes.	
Leave blank to display all Parts List Items.	
6. Enter a '1' to preload all screen detail lines with the Process Issue selection option value.	
EDIT INFORMATION:	
7. Enter a '1' to give an error if the quantity on hand is negative.	
Enter a '2' to give a soft warning when the quantity on hand is negative.	
Leave blank to not give an error.	
ITEM SALES HISTORY INFORMATION:	
8. Enter a '1' if you wish issues to effect Item Sales History (F4115).	
UNPLANNED ISSUES:	
9. Enter a '1' to allow for Unplanned Issues.	
LOT PROCESS:	
10. Enter a "1" to protect Lot Number.	

55.8 Equipment and Subledger Inventory Issues (P4112)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES :	
1. Document Type	
2. Enter a '1' to default the Location and Lot from the Primary Location.	
SCREEN CONTROL :	
3. Enter a '1' for Equipment Based Issues, a '2' for Subledger Based Issues, or a '3' for Equipment and Subledger Issues. If left blank, the screen will default to Standard Issues.	
4. Enter '1' to require an account number when Subledger Based issues are selected.	
5. Enter '1' to use 15 character lot, leave blank to default to 12 characters.	
DREAM WRITER VERSIONS :	
Enter the version for each program to be used. If left blank, version ZJDE0001 will be used.	
6. Journal Entries (P09101)	
7. G/L Functional Server (XT0911Z1)	
8. Item Search (P41200)	
9. Item Ledger (P4111)	
10. Warehouse Requests (P46100)	
PROCESSING CONTROL :	
11. Enter a '1' to protect costs, or a '2' to make costs non-display. If left blank, the update of costs is allowed.	
12. Enter a '1' to run in summary mode. G/L accounts will be summarized within each document number. If run in detail, G/L accounts will be produced for each line.	
13. Enter a '1' to allow over issuing of an item.	
14. Enter a '1' to allow issues from held lots.	
15. Enter a '1' if you want issues to affect Item Sales History (F4115).	
16. Enter a '1' to protect Lot Number. If left blank Lot Number will remain input capable.	

Processing Option	Processing Options Requiring Further Description
17. Enter which Item Search Screen is to be used to return items :	
1 = Item Search window allowing the return of multiple items.	
2 = Full Item Search screen with query capabilities.	
(If left blank, the Item Search window allowing the return of a single item will be used.)	

55.9 Simple Inventory Issues (P4112)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES :	
1. Document Type	
2. Enter a '1' to default the Location and Lot from the Primary Location.	
SCREEN CONTROL :	
3. Enter a '1' for Equipment Based Issues, a '2' for Subledger Based Issues, or a '3' for Equipment and Subledger Issues.	
If left blank, the screen will default to Standard Issues.	
4. Enter '1' to require an account number when Subledger Based issues are selected.	
5. Enter '1' to use 15 character lot, leave blank to default to 12 characters.	
DREAM WRITER VERSIONS :	
Enter the version for each program to be used.	
If left blank, version ZJDE0001 will be used.	
6. Journal Entries (P09101)	
7. G/L Functional Server (XT0911Z1)	
8. Item Search (P41200)	
9. Item Ledger (P4111)	
10. Warehouse Requests (P46100)	
PROCESSING CONTROL :	
11. Enter a '1' to protect costs, or a '2' to make costs non-display.	
If left blank, the update of costs is allowed.	
12. Enter a '1' to run in summary mode.	
G/L accounts will be summarized within each document number.	
If run in detail, G/L accounts will be produced for each line.	
13. Enter a '1' to allow over issuing of an item.	
14. Enter a '1' to allow issues from held lots.	

Processing Option	Processing Options Requiring Further Description
15. Enter a '1' if you want issues to affect Item Sales History (F4115).	
16. Enter a '1' to protect Lot Number. If left blank Lot Number will remain input capable.	
17. Enter which Item Search Screen is to be used to return items : 1 = Item Search window allowing the return of multiple items. 2 = Full Item Search screen with query capabilities. (If left blank, the Item Search window allowing the return of a single item will be used.)	

55.10 Work Order (Subledger) Inventory Issues (P4112)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES :	
1. Document Type	
2. Enter a '1' to default the Location and Lot from the Primary Location.	
SCREEN CONTROL :	
3. Enter a '1' for Equipment Based Issues, a '2' for Subledger Based Issues, or a '3' for Equipment and Subledger Issues. If left blank, the screen will default to Standard Issues.	
4. Enter '1' to require an account number when Subledger Based issues are selected.	
5. Enter '1' to use 15 character lot, leave blank to default to 12 characters.	
DREAM WRITER VERSIONS :	
Enter the version for each program to be used. If left blank, version ZJDE0001 will be used.	
6. Journal Entries (P09101)	
7. G/L Functional Server (XT0911Z1)	
8. Item Search (P41200)	
9. Item Ledger (P4111)	
10. Warehouse Requests (P46100)	
PROCESSING CONTROL :	
11. Enter a '1' to protect costs, or a '2' to make costs non-display. If left blank, the update of costs is allowed.	

Processing Option	Processing Options Requiring Further Description
12.	Enter a '1' to run in summary mode. G/L accounts will be summarized within each document number. If run in detail, G/L accounts will be produced for each line.
13.	Enter a '1' to allow over issuing of an item.
14.	Enter a '1' to allow issues from held lots.
15.	Enter a '1' if you want issues to affect Item Sales History (F4115).
16.	Enter a '1' to protect Lot Number. If left blank Lot Number will remain input capable.
17.	Enter which Item Search Screen is to be used to return items : 1 = Item Search window allowing the return of multiple items. 2 = Full Item Search screen with query capabilities. (If left blank, the Item Search window allowing the return of a single item will be used.)

55.11 Time Entry by Individual (P051121)

Processing Option	Processing Options Requiring Further Description
1.	Enter 'E' to use the Employee Occupational Rate Table, or 'U' to use the Union Rate Table. If left blank, the Employee Master billing rate will be used. (*THIS PROGRAM ONLY USES BILLING RATES*):
2.	If the Union Table is selected, enter the Pay Type to be used for each of the following categories. If the Occupational Table is selected, only enter the Pay Type for "Regular". Regular - Blank Overtime - A Double time - B Triple time - C Holiday - D
3.	Enter '1' if using Multiple Job Feature. (Please refer to program helps for information about this processing option).
4.	Enter '1' to have batch numbers automatically assigned.(F13=Invalid)
5.	Enter '1' to have heading fields loaded from the first subfile record.
6.	Enter '1' to display batch statistics on request.

Processing Option	Processing Options Requiring Further Description
7. Enter '1' to prevent changes and deletes to records locked to another user.	
8. Enter '1' to default Equipment Worked from referenced work order.	
9. Enter '1' to load Pay Type Desc. into Explanation field (YTEXR).	
10. Enter '1' to automatically split time based on Labor Distribution or Position Account Distribution instructions. Default is ' ' and time will not be split unless F2 is used during Time Entry.	

55.12 Time Entry by Job (Business Unit) (P051161)

Processing Option	Processing Options Requiring Further Description
1. Enter 'E' to use the Employee Occupational Rate Table or enter 'U' to use the Union Rate Table. If neither 'E' nor 'U' is entered, blank is the default and the Employee Master billing rate will be used. (*THIS PROGRAM ONLY USES BILLING RATES*):	
2. If the Union Table is selected, enter the Pay Type to be used for each of the following categories. If the Occupational Table is selected, only enter the Pay Type for "Regular". Regular - Blank Overtime - A Double time - B Triple time - C Holiday - D	
3. Enter '1' to have batch numbers automatically assigned (F13=Invalid).	
4. Enter '1' to have header information, heading date and job loaded from the first time card for this batch.	
5. Enter one of the following Header Update Options: (default = 0) 0 = Update time cards with header info during an add only 1 = Update time cards with header info during an add and change Note: Header Info. Changes only allowed when proc opt 4 is set to load headings.	
6. Enter one of the following Check Route Code Update Options: 0 = Update Master only if blank 1 = Update Master always 2 = Do Not Update Master	

Processing Option	Processing Options Requiring Further Description
7. Enter one of the following Cost Code window formats: (default=1) 1 = Business Unit.Object.Subsidiary 2 = Business Unit.Subsidiary.Object	
8. Enter '1' to have heading fields clear with each update.	
9. Enter '1' to default Equipment Worked on from referenced work order	
10. Enter '1' to have Equipment info on the main line.	
11. Enter '1' to load Pay Type Desc. in Explanation field (YTEXR).	

55.13 Parts List Inquiry (P1321)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
1. Enter the version of Purchase Order Inquiry to execute. Default of blank will use version 'ZJDE0001'.	
2. Enter the version of Supply/Demand Inquiry to execute. Default of blank will use version 'ZJDE0001'.	
3. Enter the version of the Scheduling Workbench to execute. Default of blank will use version 'ZJDE0002'.	
DISPLAY OPTION:	
3. Enter a '1' to completely summarize the parts when inquiring by status or start date. Default of blank will summarize by plant.	

55.14 Budget to Actual Variance (P48218)

Processing Option	Processing Options Requiring Further Description
DREAM Writer VERSION SELECTION:	
1. Enter the Job Status Inquiry (P512000) DREAM Writer version for the related function key exit. The default is version 'ZJDE0002'.	
DEFAULT PROCESSING:	
2. Enter specific Ledger Type	

55.15 Scheduling Workbench - Equipment Entry (P48201)

Processing Option	Processing Options Requiring Further Description
DEFAULT PROCESSING:	
<p>1. Enter a Work Order Status range if you want to default values into the Status fields on the screen.</p> <p>Leave blank for no default.</p> <p>From Status:</p> <p>To Status:</p>	
<p>2. Enter a Work Order Type if you want to default a value into the Type field on the screen.</p> <p>Leave blank no default.</p>	
<p>3. Enter the Purchase Order Status below which are active orders and a soft warning will be given when completing a Work Order.</p> <p>Leave blank to give no warnings about active Purchase Orders when completing a Work Order.</p>	
<p>4. Enter defaults for the following:</p> <p>Phase (Cat. Code 1)</p> <p>Category Code 2</p> <p>Category Code 3</p> <p>Business Unit</p> <p>Originator f. Planner</p> <p>Manager</p> <p>Supervisor</p>	
PROGRAM SELECTION:	
<p>5. Choose the work order entry program to call when option exit is used:</p> <p>'1' = Project Task Details (P48014) (default)</p> <p>'2' = Equipment Work Orders (P48011)</p> <p>If Equipment Work Orders (P48011) chosen, enter version.</p> <p>(Default is ZJDE0001)</p>	
<p>6. Enter the Dispatch Group to default when calling the Summary Capacity Messages screen (P3301).</p>	
<p>7. Enter the version of the Equipment Work Order Print to run when using the option.</p> <p>Default of blank will use version XJDE0001.</p> <p>Note: This option is only valid if system 13 (Equipment) is available.</p>	
<p>8. Enter the version of the Completed PM screen to display when using the option.</p> <p>Default of blank will use version ZJDE0001.</p> <p>Note: This option is only valid if system 13 (Equipment) is available.</p>	

Processing Option	Processing Options Requiring Further Description
9. Enter the DREAM Writer version of Open Order Inquiry (P430301) to call. Default of blank will use version ZJDE0006.	
FORMAT CONTROL:	
10. Enter a '1' to display the Equipment Management screen format. Enter a '2' to display the alternate Equip. format with the Assigned To field on the first detail line. Leave blank (Default) to display the Work Order screen format.	

55.16 General Ledger Post (P09800)

Processing Option	Processing Options Requiring Further Description
BATCH SELECTION:	
1. Enter Batch Number or Batch Date or Batch User ID	
PRINT SELECTION:	
2. Identify how to print amount fields on Post Journal: '1' = to Millions (w/ commas) '2' = to Billions (w/o commas) Blank (Default) = No Journal Printed.	
3. Identify which account number to print on report: '1' = Account Number '2' = Short Account ID '3' = Unstructured Account '4' = (Default) Number Entered During Input	
FIXED ASSETS:	
4. Enter a '1' to post F/A entries to Fixed Assets. Note: DREAM Writer version ZJDE0001 of Post G/L Entries to Assets (P12800) is executed when this option is selected. All transactions selected from that DREAM Writer will be posted rather than just the current entries being posted to G/L.	
5. Enter a 'Y' if you wish to explode parent item time down to the assembly component level. Component billing rates will be used. (This applies to batch type 'T' only.)	
CASH BASIS ACCOUNTING:	
6. Enter a '1' to create and post Cash Basis accounting entries. (Applies to batch type G, K, M, W, & R only.)	
7. Enter units ledger type for Cash Basis Accounting entries. (Default of blank will use "ZU" ledger type.)	
ACCOUNTING FOR 52 PERIODS:	

Processing Option	Processing Options Requiring Further Description
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8. Enter a '1' for 52 Period Post.

Note: DREAM Writer data selection is used for 52 period posting ONLY. It is NOT used for the standard post to the F0902. Additionally, 52 period date patterns must be set up.

TAX FILE UPDATE:

9. Identify when to update the Tax Work file (F0018):

'1' = V.A.T. or Use Tax only

'2' = for All Tax Amounts

'3' = for All Tax Explanation Codes

Blank (Default) = No Update to File

Note: When using Vertex Taxes the Vertex Tax Register file will be updated instead of the Tax Work file for methods '1', '2', and '3'.

10. Adjust VAT Account for Cash Receipt Adjustments and Write Offs. Tax explanation must be a 'V'.

'1' = update VAT amount only

'2' = update VAT amount, extended price and taxable amount

11. Adjust VAT Account for Discount Taken. The Tax Rules file must be set to Calculate Tax on Gross Amount, including Discount and Calculate Discount on Gross Amount, including Tax. Tax explanation must be a 'V'.

'1' = update VAT amount only

'2' = update VAT amount, extended price and taxable amount

PROPERTY MANAGEMENT:

12. Enter DREAM Writer version of Property Management G/L Transaction Creation to be executed.

Default is version ZJDE0001. (This applies to batch types '2' and '/'.)

UPDATE OPTION:

13. Enter '1' to update short ID number, company, fiscal year/period number, century, and fiscal quarter in unposted transaction records selected for posting. (May be required for custom input programs.)

REPORT FORMAT:

14. Enter a '1' to print the Posting Journal in a 198 character format.

The default of blank will print the format with 132 characters.

DETAILED CURRENCY RESTATEMENT:

15. Enter a '1' to create currency restatement entries. This creates records in the XA, YA, and/or ZA ledgers depending on the version you are running.

Processing Option	Processing Options Requiring Further Description
16. Enter the version of the Detailed Currency Restatement (P11411) to execute. Default of blank will execute ZJDE0001.	
RECONCILIATION FILE PROCESSING:	
17. Enter a '1' to update the Cross-Environment Reconciliation file. Blank will not update the reconciliation file. Note: The Cross-Environment Reconciliation file can also be updated through the stand-alone Cross-Environment File Creation program.	
REVERSING JOURNAL ENTRIES:	
18. When normal number of periods = 12 or 13 and posting a reversing entry into period 12 or 13, enter a '1' to create reversing journal entries to the first period of the following year. This is to avoid posting reversing entries to an adjusting period. Example: Normal number of periods = 12. Period 12 ends 12/30/xx and period 13 ends 12/31/xx. Journal Entry date of 12/30/xx will post reversing entry to period 01 of next year if processing option is set to '1'.	
BATCH TYPE SELECTION:	
Note: This option should NOT be changed by User.	

Maintenance Planning Processing Options

This chapter contains these topics:

- Section 56.1, "PM Projections (P13411)"
- Section 56.2, "Review Planning Family (P3401)"
- Section 56.3, "Supply/Demand Inclusion Rules (P34004)"
- Section 56.4, "Message Detail (P3411)"
- Section 56.5, "Time Series (P3413)"
- Section 56.6, "Supply & Demand (P4021)"
- Section 56.7, "Where Used Inquiry (P30201)"
- Section 56.8, "Load (P3313)"
- Section 56.9, "Load Bar Graph (P3313B)"
- Section 56.10, "Period Summary (P3312)"
- Section 56.11, "Production Status (P31226)"
- Section 56.12, "Work Center Resource Units (P3007)"
- Section 56.13, "Work Center Resource Units Refresh (P3007G)"

56.1 PM Projections (P13411)

Processing Option	Processing Options Requiring Further Description
1. Enter the From Date for PM Projections.	
2. Enter the Through Date for PM Projections.	
3. Enter the Forecast Type.	

56.2 Review Planning Family (P3401)

Processing Option	Processing Options Requiring Further Description
MPS TYPE CODES:	
1. Enter the Type Code to be displayed or a '*' for all Types.	
MANUFACTURING SCHEDULING WORKBENCH:	

Processing Option	Processing Options Requiring Further Description
	2. Enter the version of Manufacturing Scheduling Workbench to be used. Default is ZJDE0001.
	MESSAGE FILE REVISIONS:
	3. Enter the version of Message File Revisions to be used. Default is ZJDE0001.
	ITEM AVAILABILITY:
	4. Enter the version of Item Availability to be used. Default is ZJDE0001.
	TIME SERIES:
	5. Enter the version of Time Series to be used. Default is ZJDE0001.
	DETAIL FORECAST MAINTENANCE:
	6. Enter the version of Detail Forecast Maintenance to be used. Default is ZJDE0001.
	SUPPLIER SCHEDULING REVISIONS:
	7. Enter the version of Supplier Schedule Revisions to be used. Default is ZJDE0001.
	SUPPLIER MASTER:
	8. Enter the version of Supplier Master to be used. Default is ZJDE0001.
	PURCHASE ORDER GENERATION:
	9. Enter a '1' to default the tax area from the "Ship-To" address book number. If left blank, the tax area will be defaulted from the "Supplier" address number.
	SORT KEY:
	10. Enter a '1' to sort records first by supplier number. If you turn it to '1', it may take longer.

56.3 Supply/Demand Inclusion Rules (P34004)

Processing Option	Processing Options Requiring Further Description
	DOCUMENT TYPES:
	1. Enter the Document Types for Work Order and Rate you want to setup Inclusion Rules for. The document types can be stacked one after the other for multiple document types. If left blank, 'WOSC' will be used.

56.4 Message Detail (P3411)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
Enter the version for each program.	
If left blank, 'ZJDE0001' will be used.	
1. Purchase Order Entry (P4311)	
2. Open Purchase Orders (P430301)	
3. Supplier Master (P01054)	
4. Work Order Entry (P48013)	
5. Shop Floor Workbench (P31225)	
6. Blanket Order Release (P43060)	
7. Pegging Inquiry (P3412)	
8. Supply/Demand Inquiry (P4021)	
9. Enter/Change Rate Schedule (P3109)	
10. Time Series (P3413)	
11. Bill Availability (P30205)	
12. Transfer Order Entry (P4242)	
13. Manufacturing Values (P41027)	
14. Work Order Generation (X4201WO)	
PURCHASE ORDER INFORMATION:	
15a. Enter a '1' to consolidate all messages for a supplier on one purchase order.	<p data-bbox="836 1098 1463 1245">Selection of this processing option will result in fewer orders created. The program will create the OT Purchase, and ST Sales Orders as it does now, but instead of creating separate orders per each message it will create one ST and OT with multiple detail lines</p> <p data-bbox="836 1245 1463 1360">Note: JD Edwards World did this enhancement in conjunction with APS Integration. The changes listed to P3411A pertain only to clients that are integrated with APS (system 34A).</p>
15b. Enter a '1' to automatically print P.O.'s via the subsystem.	
WORK ORDER INFORMATION:	
16. Enter the status for cancelled orders.	
BLANKET ORDER INFORMATION:	
17. Enter the document type associated with blanket orders.	
If left blank, open blanket orders will not be used.	
SUPPLY/DEMAND DEFAULT:	
18. Enter the default mode for viewing Supply/Demand branch messages:	
D = Demand branch in header	
S = Supply branch in header	
If left blank, the data dictionary default will be used.	

Processing Option	Processing Options Requiring Further Description
DISPLAY SEQUENCE DEFAULT:	
19. Enter the default sequence for viewing messages:	
1 = Message Type, Recommended Complete date	
2 = Recommended Complete date, Message Type	
If left blank, sequence '1' will be used.	
TRANSFER ORDER INFORMATION:	
20. Enter a '1' to consolidate transfer order message for the same supply and demand branches on one order.	

56.5 Time Series (P3413)

Processing Option	Processing Options Requiring Further Description
ITEM RECALCULATION:	
1. Enter the version to use when submitting a single item MPS/MRP/DRP recalculation.	
If left blank, version 'ZJDE0001' will be used.	
PAST DUE PERIODS:	
2. Enter the number of past due periods (0-2).	Set to 2 if using Planning Fence Rule H.
If left blank, there will be no past due periods.	
ROW DESCRIPTIONS:	
3. Enter the UDC for row descriptions.	
4. Enter the UDC for alternate row descriptions.	
SUPPLY/DEMAND SUMMARY:	
5. Enter a '1' to summarize the supply and demand lines into one line each.	
DREAM WRITER VERSIONS:	
Enter the version for each program.	
If left blank, 'ZJDE0001' will be used.	
6. Message File Revisions (P3411)	
7. Supply/Demand Inquiry (P4021)	
8. Detail Forecast Revisions (P3460)	
9. Pegging (P3412)	
10. Rate Schedule Revisions (P3109)	
FORECAST CONSUMPTION PROCESSING:	
11. Enter '1' to process using Forecast Consumption logic.	

56.6 Supply & Demand (P4021)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTIONS:	

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to deduct Safety Stock from Availability.	
2. Enter a '1' by the following Routing Quantities to be considered on hand.	
Any quantity not included will be displayed on the appropriate date.	
Quantity in Transit	
Quantity in Inspection	
User Defined Quantity 1	
User Defined Quantity 2	
3. Enter a '1' to summarize all In Receipt Routing steps into one line.	
4. Enter a '1' to summarize Item Location records.	
5. Enter one of the following:	
' ' = No Available to Promise Line	
'1' = Available to Promise Line	
'2' = Cumulative ATP Line	
6. Enter the version of Supply/Demand Inclusion Rules to be used.	
7. Enter a '1' to display the window format if called from another program.	
8. Enter a '1' to use an alternate screen format which has long quantity fields.	
DREAM WRITER VERSIONS:	
Enter the DREAM Writer version to use for each program listed.	
If left blank, version ZJDE0001 will be used.	
9. Purchase Order Entry (P4311)	
10. Purchase Order Inquiry (P430301)	
11. Sales Order Entry (P4211)	
12. Sales Order Inquiry (P42045)	
13. Scheduling Workbench (P31225)	
14. MPS/MRP/DRP Pegging Inq. (P3412)	
15. MPS/MRP/DRP Time Series (P3413)	
16. MPS/MRP/DRP Message Detail(P3411)	
OPTIONAL RECORDS:	
17. Enter a '1' to include Planned Orders from MPS/MRP/DRP generations.	
If left blank, Planned Orders will not be displayed.	

Processing Option	Processing Options Requiring Further Description
<p>18. Enter the Forecast Type to include</p> <p>Forecast Type</p> <p>Forecast Type</p> <p>Forecast Type</p> <p>Forecast Type</p> <p>Forecast Type</p>	
<p>19. Enter the number of days (+/-) from today's date that you wish to begin including Forecast records.</p> <p>A blank will use today's date to begin including Forecast records.</p>	
<p>20. Enter a '1' to omit 'Bulk' Stocking Type records from screen.</p> <p>If left blank, 'Bulk' items will be included.</p>	
<p>21. Enter the rate based Schedule Type to use.</p> <p>If left blank, no rate based schedules will be displayed.</p>	
<p>22. Enter a '1' to include Past Due Rates as a supply.</p> <p>POTENCY:</p>	
<p>23. Enter '1' to convert Quantities to Standard Potency.</p> <p>LOT EXPIRATION:</p>	
<p>24A. Enter '1' to reduce Quantity available due to lot expiration.</p> <p>Note: This option will not work with ATP. If you use this option, option 5 must be set to blank or 2.</p>	
<p>24B. Enter optional date to be used for expiration calculation when processing option 24A='1'.</p> <p>If left blank, Lot Expiration Date will be used.</p> <p>1=Sell By Date</p> <p>2=Best Before Date</p> <p>3=User Defined Date1</p> <p>4=User Defined Date2</p> <p>5=User Defined Date3</p> <p>6=User Defined Date4</p> <p>7=User Defined Date5</p> <p>8=Commitment Date Method from Item/ Branch Master.</p>	
<p>LOT HOLD CODES:</p> <p>25. Enter the lot hold codes (up to 5) to be considered on hand, or enter an '*' to consider all held lots as on hand.</p> <p>If left blank, held lots will not be considered on hand.</p>	
<p>WORK ORDER ENTRY:</p> <p>26. Enter the Dream Writer version to use for the Manufacturing Work Order Entry program.</p> <p>If left blank, version ZJDE0001 will be used.</p>	
<p>BILL AVAILABILITY:</p>	

Processing Option	Processing Options Requiring Further Description
27. Enter the version of Bill Availability (P30205) to be called.	
If left blank, version ZJDE0001 will be used.	
OVER DUE SUPPLY CONTROL:	
28. Enter a '1' to leave past due supply out of available calculations (past due orders will be displayed but will not be included in quantity available or ATP).	
FORECAST DISPLAY OPTIONS:	
29. Enter a '1' to override the planning fence rule and just use actual customer demand for the available calculation.	
Note: forecast will still appear on the screen per processing option above.	
When left blank, the available calculation will be based on the planning fence and rule established in the item's branch plant manufacturing data.	

56.7 Where Used Inquiry (P30201)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. Enter one of the following:	
1 = Single-Level	
2 = Multi-Level	
3 = Indented	
4 = All processes where a co- or by-product is produced	
5 = Part/Ingredient Availability If left blank, the Single-Level mode will be displayed.	
2. Bill Type (Optional)	
DREAM WRITER VERSIONS:	
Enter the version for each program. If left blank, 'ZJDE0001' will be used.	
NOTE: Option 6 is only valid if System 13 (Equipment) is available.	
3. Item Search (P41200)	
4. Material Where-Used Print (P30420)	
5. Work Order Entry (P48013)	
6. Item Availability (P30205)	
7. Where-Used Detail (P13226)	

56.8 Load (P3313)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	

Processing Option	Processing Options Requiring Further Description
-------------------	--

- | | |
|---|--|
| 1. Enter the Capacity Mode to use:
1 = Resource Requirements Planning
2 = Rough Cut Capacity Planning
3 = Capacity Requirements Planning | |
| 2. Enter UDC table to use for row descriptions. | |
| 3. Enter the Unit of Measure.
If left blank, 'HR' will be used. | |
| DREAM WRITER VERSIONS:
Enter the version for each program.
If left blank, 'ZJDE0001' will be used. | |
| 4. Dispatch List (P31226) | |

56.9 Load Bar Graph (P3313B)

Processing Option	Processing Options Requiring Further Description
-------------------	--

- | | |
|---|--|
| DEFAULT VALUES: | |
| 1. Enter the Capacity Mode to use:
1 = Resource Requirements Planning
2 = Rough Cut Capacity Planning
3 = Capacity Requirements Planning | |
| 2. Enter the Unit of Measure.
If left blank, 'HR' will be used. | |
| DREAM WRITER VERSIONS:
Enter the version for each program.
If left blank, 'ZJDE0001' will be used. | |
| 3. Dispatch List (P31226) | |

56.10 Period Summary (P3312)

Processing Option	Processing Options Requiring Further Description
-------------------	--

- | | |
|---|--|
| DEFAULT VALUES: | |
| 1. Enter the Capacity Mode to use:
1 = Resource Requirements Planning
2 = Rough Cut Capacity Planning
3 = Capacity Requirements Planning | |
| 2. Enter the Unit of Measure.
If left blank, 'HR' will be used. | |
| DREAM WRITER VERSIONS:
Enter the version for each program.
If left blank, 'ZJDE0001' will be used. | |

Processing Option	Processing Options Requiring Further Description
3. Dispatch List (P31226)	

56.11 Production Status (P31226)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. From Status (Optional)	
2. Through Status (Optional)	
3. The number of days to add to today's date for the Thru date (Optional)	

56.12 Work Center Resource Units (P3007)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. Enter the Unit of Measure. If left blank, 'HR' will be used.	

56.13 Work Center Resource Units Refresh (P3007G)

Processing Option	Processing Options Requiring Further Description
GENERATION INFORMATION:	
1. Enter the Start Date.	
2. Enter the End Date.	
Note: The program will regenerate resource units for the entire month of the start date and the entire month of the end date.	
3. Enter the Branch/Plant to be processed.	
4. Enter a string of up to 6 shift codes to be processed ('123 '). If left blank, all shifts will be processed.	

Setup Processing Options

This chapter contains these topics:

- [Section 57.1, "AAs - Fixed Assets \(P00121\)"](#)
- [Section 57.2, "Define Formats - Job Status Inquiry \(P5193\)"](#)
- [Section 57.3, "Define Paths - Job Status Inquiry \(P51941\)"](#)
- [Section 57.4, "Work Order Data Base \(P48090\)"](#)
- [Section 57.5, "Work Order Parts List Revisions \(P1311\)"](#)
- [Section 57.6, "Equipment WO Routings \(P1312\)"](#)
- [Section 57.7, "Routing Master Revisions \(P3003\)"](#)
- [Section 57.8, "Item Cost Update \(P30835\)"](#)

57.1 AAs - Fixed Assets (P00121)

Processing Option	Processing Options Requiring Further Description
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Enter the starting sequence number.

57.2 Define Formats - Job Status Inquiry (P5193)

Processing Option	Processing Options Requiring Further Description
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DISPLAY OPTION:

1. Enter the Record Type to display and maintain:

43 = Supplier Analysis

51 = Job Cost

57.3 Define Paths - Job Status Inquiry (P51941)

Processing Option	Processing Options Requiring Further Description
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DISPLAY OPTION:

1. Enter the Record Type to display and maintain:

43 = Supplier Analysis

51 = Job Cost

57.4 Work Order Data Base (P48090)

Processing Option	Processing Options Requiring Further Description
DEFAULT OPTION:	
1. Enter the Work Order Data Base to default on the screen.	
Leave blank to default Data Base "E" (Engineering Change Orders).	

57.5 Work Order Parts List Revisions (P1311)

Processing Option	Processing Options Requiring Further Description
PURCHASE ORDER INFORMATION:	
1. Enter '1' for allow purchase orders to be created.	
2. Enter the Document Type associated with Purchase Orders.	
3. Enter the Beginning P.O. Status. If left blank, the status will be defaulted from the Order Activity Rules.	
4. Enter the Part Status after P.O.	
5. Enter a '1' to consolidate all messages onto one purchase order by vendor.	
6. Enter where the approval route code should be defaulted from, OR enter a specific route code value. If left blank, no approval processing will be performed. 1 = Originator's Address Book Number 2 = Originator's User Profile 3 = Branch/Plant Route Code 4 = Default Locations Route Code	
SUPPLIER MASTER VERSION:	
7. Enter the DREAM Writer version of the Supplier Master (P01054) to call. Leave blank to call version ZJDE0001.	
TAX AREA DEFAULT:	
8. Enter a '1' to default the tax area from the "Ship-To" address book number. If left blank, the tax area will be defaulted from the "Supplier" address number.	
REQUIRED DATE:	
9. Enter a '1' to require the entry of the required date. Leave blank to allow a blank required date.	
DREAM WRITER VERSION SELECTION:	
10. Enter the DREAM Writer version of the Open Order Inquiry (P430301) to call. Leave blank to call version ZJDE0006.	

Processing Option	Processing Options Requiring Further Description
11. Enter the DREAM Writer version of the Supply Demand Inquiry (P4021) to call. Leave blank to call version ZJDE0003.	
12. Enter the DREAM Writer version of the Item Availability by Time (P3413) to call. Leave blank to call version ZJDE0004.	
BILL OF MATERIALS REVISION VERSION:	
13. Enter the DREAM Writer version of The Bill of Materials Revision (P3002) to call. Leave blank to call version ZJDE0002.	
PURCHASE ORDER ENTRY VERSION:	
14. Enter the DREAM Writer version of the Purchase Order Entry (P4311) to call. Leave blank to call version ZJDE0001.	
LOT PROCESS:	
15. Enter a '1' to protect Lot Number.	
BOM COPY:	
16. Enter a '1' to preload all BOM Copy detail lines with the Add Part for BOM Copy selection option value.	
WORK ORDER INVENTORY ISSUES VERSION:	
17. Enter the Dream Writer version of the Work Order Inventory Issues (P31111) to call. Leave blank to call version ZJDE0001	
APPROVAL PROCESSING:	
18. Enter the Awaiting Approval status.	
19. Enter the Approved status.	

57.6 Equipment WO Routings (P1312)

Processing Option	Processing Options Requiring Further Description
DREAM Writer VERSION SELECTION:	
1. Enter the DREAM Writer version of the Capacity Load program to be called. Leave blank to default to ZJDE0003.	
EDIT OPTION:	
2. Enter a '1' to highlight the resource when it is over capacity. Leave blank for no highlight.	

57.7 Routing Master Revisions (P3003)

Processing Option	Processing Options Requiring Further Description
FIELD DISPLAY:	
1. Enter a '1' by the following fields to activate them:	
Line/Cell	
Routing Type	
Batch Quantity	
DEFAULT VALUES:	
2. Routing Type (Optional)	
UPDATE OPTIONS:	
3. Enter a '1' to update the Component Operation Scrap Percent in the Bill of Material for the components on the operation and the Cumulative Yield Percent on the Routing, when updating the operation yield percent.	
COMPONENT BRANCH:	
4. Enter a '1' to change Component Branch to that of Parent Branch when copying a routing.	
DATE EFFECTIVITY:	
5. Enter a date to default into the As of Date or '*' to display all dates.	
If left blank, the system date will be used.	

57.8 Item Cost Update (P30835)

Processing Option	Processing Options Requiring Further Description
PROCESSING CONTROL:	
1. Enter a '1' to update costs.	
If left blank, Proof mode is assumed and costs will not be updated.	
2. Enter the Cost Method to update in the Cost Components and Item Cost Ledger files.	This is the OUTPUT. This is the cost method that will be updated in final mode.
If left blank, '07' will be used.	
3. Enter a '1' to simulate only the items selected and not explode the bill of material.	If this is set to 1, only the items in the data selection will update. If blank, then all items on all levels of the Bill of material will be updated.
4. Enter a '1' to update the Work Center Rates in the Work Center Rates file.	
If left blank, rates will not be updated.	
PROCESS MANUFACTURING:	
5. Enter a '1' to update costs of Co/By-Products.	
ACCOUNT LEDGER INFORMATION:	

Processing Option	Processing Options Requiring Further Description
<p>6. Enter one of the following:</p> <p>1 = Write Detailed G/L transactions (by Item)</p> <p>2 = Write Summarized G/L transactions (by Account).</p> <p>If left blank, no G/L transactions will be written.</p>	
<p>7. Enter the General Ledger Date.</p> <p>If left blank, the system date will be used.</p>	
REPORT FORMAT:	
<p>8. Enter one of the following:</p> <p>1 = Print all items</p> <p>2 = Print changed items</p> <p>If left blank, all items will be printed.</p>	
WIP RE-VALUATION:	
<p>9. Enter a '1' to adjust WIP according to new costs.</p>	
<p>10. Enter the document type.</p> <p>If left blank, 'IB' will be used.</p>	
<p>11. Enter one of the following:</p> <p>1 = Write Detailed G/L transactions (by document)</p> <p>2 = Write Summarized G/L transactions (by Account).</p> <p>If left blank, no G/L transactions will be written.</p>	
<p>12. Enter a '1' to move the Production Document Number into the Sub-Ledger field.</p>	<p>This cannot be set to 1 if processing option 6 or 11 is set to 2.</p>
DEFAULT DISPLAY DECIMALS:	
<p>13. Enter the number of decimals to use for display (0-4) in the Item Cost Rollup Report(P30835).</p> <p>If left blank, 4 decimals will be used.</p>	

Advanced & Technical Processing Options

This chapter contains these topics:

- Section 58.1, "Update Work Order Status based on Purchase Order Receipt (P48810)"
- Section 58.2, "Standard Parts List Update (P13802)"
- Section 58.3, "Item Balance Repost (P12910)"
- Section 58.4, "Work Order Purge (P4801P)"
- Section 58.5, "Purge Item Master and Item Balance Files (P12912)"
- Section 58.6, "Fixed Assets Supplemental Data (P12400)"
- Section 58.7, "Specification Data Report (P12416)"
- Section 58.8, "All Item Numbers by Data Type - Alpha/Item Number (P12440)"
- Section 58.9, "Location Tracking Report (P12460)"
- Section 58.10, "Equipment Cost Analysis (P12424)"
- Section 58.11, "Equipment Variance Report - by Item (P13400)"
- Section 58.12, "Equipment Variance Report - by Job (P13400)"
- Section 58.13, "Fixed Asset Ledger - Posted (P12420)"
- Section 58.14, "Work Order Summary Status - by Business Unit (P48496)"
- Section 58.15, "Work Order Summary Status - by Phase Code (P48496)"
- Section 58.16, "Work Order Cost Summary (P48497)"
- Section 58.17, "Period Summary (P3352)"
- Section 58.18, "Work Order Cost Detail (P48498)"
- Section 58.19, "Print Work Order Gantt Chart (P48440)"
- Section 58.20, "Equipment History Report (P13420)"
- Section 58.21, "Budget to Actual Report (P13418)"
- Section 58.22, "Work Order Execution Report (P13430)"
- Section 58.23, "Labor Utilization Report (P13440)"
- Section 58.24, "Parts Forecast Report (P13450)"
- Section 58.25, "Equipment Parts List Report (P13410)"
- Section 58.26, "Completed Maintenance Records (P12407)"

- Section 58.27, "Mechanic's Worksheet (P12407)"
- Section 58.28, "Scheduled Maintenance Records (P12407)"
- Section 58.29, "Item Log - Actual Maintenance (P12450)"
- Section 58.30, "Item Log - Planned Maintenance (P12450)"
- Section 58.31, "Item Log - Problems vs Maintenance (P12450)"
- Section 58.32, "Item Log - Reported Problems (P12450)"
- Section 58.33, "Schedule & Message Detail (P3450)"
- Section 58.34, "PM Projection Print - Monthly (P13412)"
- Section 58.35, "PM Projection Print - Quarterly (P13412)"
- Section 58.36, "PM Projection Print - Weekly (P13412)"
- Section 58.37, "Frequency of Occurrence (P13419)"
- Section 58.38, "Planning (P3350)"

58.1 Update Work Order Status based on Purchase Order Receipt (P48810)

Processing Option	Processing Options Requiring Further Description
PO RECEIPT STATUS:	
1. Enter the purchase order status above which indicates that the purchase order has been received.	
WO STATUS:	
2. Enter the status to change the work order to when all parts have been received.	
3. Enter the status to change the work order to when some parts have been received.	
E-MAIL ADDRESS:	
4. Define which work order address will receive an E-mail message about the change in work order status.	
1 = Originator (ANO)	
2 = Assigned To (ANP)	
3 = Supervisor (ANPA)	
4 = Manager (ANSA)	
5 = Customer (AN8)	

58.2 Standard Parts List Update (P13802)

Processing Option	Processing Options Requiring Further Description
UPDATE OPTIONS:	
1. Enter a '1' to run in Final Mode and update the standard parts list.	
Leave blank to run in Preliminary Mode and print report only.	

Processing Option	Processing Options Requiring Further Description
2. Enter a '1' to use Original Quantity when Transaction Quantity is zero. Leave blank to use zero quantity on update.	
3. Enter a '1' to also update Standard Parts List of the piece of equipment on the work order.	

58.3 Item Balance Repost (P12910)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTION:	
1. Enter a '1' to print differences and update Fixed Asset Balance File. Leave blank (default) to only print the differences between Transaction Ledger file (F0911) and Fixed Asset Balance file (F1202).	
2. Identify how to print asset number. 1 = Item Number (DEFAULT) 2 = Unit Number 3 = Serial/Tag Number	
PURGE F1202 PERIOD AMOUNTS:	
3. Enter a '1' to first clear all period postings in F1202 for selected records prior to reposting. It is HIGHLY recommended that you back up your F1202 file if activating this selection. Note: You MUST verify that XJDE0001 for P129101 is correctly selecting the records you will be reposting. Only AA ledgers will be cleared.	

58.4 Work Order Purge (P4801P)

Processing Option	Processing Options Requiring Further Description
PROCESSING CONTROL:	
1. Enter a '1' to save purged records to a special purge library.	
2. Enter a '1' to reorganize the purged file.	

58.5 Purge Item Master and Item Balance Files (P12912)

Processing Option	Processing Options Requiring Further Description
PURGE SELECTION OPTIONS:	

Processing Option	Processing Options Requiring Further Description
-------------------	--

1. Enter a '1' next to the following files you want to purge:

- F1201 - Item Master File
- F1202 - Item Balances File
- F1301 - Equipment Rental Rate File
- F1204 - Location History File
- F1205 - Item Message File
- F1206 - License Master File
- F1207 - Maintenance Schedule File
- F1212 - Parent History File
- F1307 - Status History File
- F1308 - Maintenance Loops File
- F13907 - Associated Service Types

Note: If the F1201 File is selected for purge, all related files will also be purged.

2. Enter one of the following:

'1' = purge records for assets if the disposal date is less than the current fiscal year. Use this option when purging F1301, F1204, F1205, F1206, F1207, and F1307 only.

'2' = purge prior year Item Balance records for selected assets.

'3' = do both 1 and 2 above.

3. If purging prior year Item Balance (F1202) records, enter the number of years to retain. (The default and minimum is one year or current year balances.)

Note: Be sure the Fixed Asset Annual Close has been run PRIOR to purging last year's Item Balance Records.

PRINT OPTION:

4. Enter one of the following to print on the purge report:

'1' = Item Number

'2' = Unit Number

'3' = Serial/Tag Number

58.6 Fixed Assets Supplemental Data (P12400)

Processing Option	Processing Options Requiring Further Description
-------------------	--

PRINT SELECTION:

1. Enter a 'N' to bypass printing text information on the report.

Leave blank (default) to print the text.

Processing Option	Processing Options Requiring Further Description
-------------------	--

2. Choose which asset number to print:

'1' = Item Number (default).

'2' = Unit Number.

'3' = Serial Number.

58.7 Specification Data Report (P12416)

Processing Option	Processing Options Requiring Further Description
-------------------	--

1. Enter a '1' to display Specification Template. Leave blank to display Specification Data.

58.8 All Item Numbers by Data Type - Alpha/Item Number (P12440)

Processing Option	Processing Options Requiring Further Description
-------------------	--

PRINT SELECTION:

1. Enter a 'N' to bypass printing text information on the report.

Leave blank (default) to print the text.

2. Choose which asset number to print:

'1' = Item Number (default).

'2' = Unit Number.

'3' = Serial Number.

58.9 Location Tracking Report (P12460)

Processing Option	Processing Options Requiring Further Description
-------------------	--

PRINT OPTIONS:

1. Enter a '1' to print the Location Tracking text.

Leave blank (default) to print no associated text.

2. Choose which asset number to print:

'1' = Item number (default).

'2' = Unit number.

'3' = Serial number.

58.10 Equipment Cost Analysis (P12424)

Processing Option	Processing Options Requiring Further Description
-------------------	--

REPORT SELECTION:

1. Identify how to print report.

D = Detail Report (DEFAULT)

O = Total by Object Account

S = Summary Report

R = Total by Subsidiary Account

DATE SELECTION:

2. Enter through period or through fiscal date.

Leave blank to use current period.

LEDGER TYPE SELECTION:

3. Enter a single ledger type.

Leave blank (default) for "AA" ledger.

UNITS SELECTION:

4. Enter a "1" to suppress units from printing on report.

Leave blank to print units (default).

5. Identify what Automatic Accounting Instruction to use for units.

Y = 'AT00' AAI (DEFAULT)

A = 'FMA ' AAI

B = 'FMB ' AAI

PRINT SELECTION:

6) Enter a "1" to omit printing assets with zero cost.

Leave blank to print all assets (DEFAULT).

7) Identify how to print asset number.

1 = Item Number (DEFAULT)

2 = Unit Number

3 = Serial Number

8) Identify how to print the amounts.

blank = Amounts w/ commas (DEFAULT)

1 = Amounts w/o commas

58.11 Equipment Variance Report - by Item (P13400)

Processing Option	Processing Options Requiring Further Description
-------------------	--

DATE SELECTION:

1. Enter the date range over which the report will cover:

a. From Period:

b. From Fiscal Year:

c. Thru Period:

d. Thru Fiscal Year:

Processing Option	Processing Options Requiring Further Description
AMOUNT SELECTION:	
2. Enter a '1' to print inception-to- date amounts. Leave blank (default) to print current period amounts.	
COLUMN HEADING ACCOUNT RANGE SELECTION:	
3. Enter object account ranges to be included under the following column headings on the report:	
a. "Standard Amount" column - Beginning Object Account: Ending Object Account:	
b. "Actual Amount" column - Beginning Object Account: Ending Object Account:	
c. "Actual Hours" column - Beginning Object Account: Ending Object Account:	
PRINT SELECTION:	
4. Identify how to print asset number: 1= Item Number (Default) 2= Unit Number 3= Serial Number	

58.12 Equipment Variance Report - by Job (P13400)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the date range over which the report will cover:	
a. From Period:	
b. From Fiscal Year:	
c. Thru Period:	
d. Thru Fiscal Year:	
AMOUNT SELECTION:	
2. Enter a '1' to print inception-to- date amounts. Leave blank (default) to print current period amounts.	
COLUMN HEADING ACCOUNT RANGE SELECTION:	

Processing Option	Processing Options Requiring Further Description
-------------------	--

3. Enter object account ranges to be included under the following column headings on the report:

a. "Standard Amount" column -

Beginning Object Account:

Ending Object Account:

b. "Actual Amount" column -

Beginning Object Account:

Ending Object Account:

c. "Actual Hours" column -

Beginning Object Account:

Ending Object Account:

PRINT SELECTION:

4. Identify how to print asset number:

1= Item Number (Default)

2= Unit Number

3= Serial Number

58.13 Fixed Asset Ledger - Posted (P12420)

Processing Option	Processing Options Requiring Further Description
-------------------	--

PRINT SELECTION:

1. Identify how to print the Amount.

blank = Amount w/commas (DEFAULT)

1 = Amount w/o commas

58.14 Work Order Summary Status - by Business Unit (P48496)

Processing Option	Processing Options Requiring Further Description
-------------------	--

PRINT OPTION:

1. Choose one of the following:

'1' = Print equipment item numbers.

'2' = Print equipment unit numbers.

'3' = Print equipment serial numbers.

' ' = Do not print equipment numbers (default).

LEDGER TYPE SELECTION:

2. Enter a single ledger type.

Leave blank (default) for "AA" ledger.

58.15 Work Order Summary Status - by Phase Code (P48496)

Processing Option	Processing Options Requiring Further Description
PRINT OPTION:	
1. Choose one of the following:	
'1' = Print equipment item numbers.	
'2' = Print equipment unit numbers.	
'3' = Print equipment serial numbers.	
' ' = Do not print equipment numbers (default).	
LEDGER TYPE SELECTION:	
2. Enter a single ledger type.	
Leave blank (default) for "AA" ledger.	

58.16 Work Order Cost Summary (P48497)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the date range for the report.	
Leave blank (default) to include all costs, regardless of their G/L dates.	
From Date:	
Thru Date:	
LEDGER TYPE SELECTION:	
2. Enter a single ledger type.	
Leave blank (default) for "AA" ledger.	

58.17 Period Summary (P3352)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. Enter the Capacity Mode to use:	
1 = Resource Requirements Planning	
2 = Rough Cut Capacity Planning	
3 = Capacity Requirements Planning	
2. Enter the Unit of Measure.	
If left blank, 'HR' will be used.	
3. Enter the Start Date.	
If left blank, the system date will be used.	
4. Enter the End Date.	
If left blank, all data after the Start Date will displayed.	

58.18 Work Order Cost Detail (P48498)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the From Date. Leave blank (default) to include all costs with G/L dates up to the Thru Date below.	
2. Enter the Thru Date. Leave blank (default) to include all costs with G/L dates from the From Date forward.	
LEDGER TYPE SELECTION:	
3. Enter a single ledger type. Leave blank (default) for "AA" ledger.	

58.19 Print Work Order Gantt Chart (P48440)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the 'as of' date for the Gantt Chart.	
SPREAD FREQUENCY OPTION:	
2. Enter a '1' to spread the chart monthly. Leave blank (default) to spread it weekly.	

58.20 Equipment History Report (P13420)

Processing Option	Processing Options Requiring Further Description
PRINT OPTION:	
1. Identify how to print asset number. 1 = Item Number (Default) 2 = Unit Number 3 = Serial Number	
DATE OPTION:	
2. Work Order Completion Date. From: To:	
FAILURE CODE OPTION:	
4. Define UDC for Failure Code. (01-10)	
ACTION CODE OPTION:	
5. Define UDC for Action Code. (01-10)	

58.21 Budget to Actual Report (P13418)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the Work Order Date from which to start the work order selection.	
2. Enter the Work Order Date from which to end the work order selection.	
PRINT SELECTION:	
3. Identify how to print asset number.	
1 = Item Number (Default)	
2 = Unit Number	
3 = Serial Number	
UPDATE OPTION:	
4. Enter a '1' to run the Update WO Hours program (P13800) as you print the report.	
Default of blank will not run the update program.	

58.22 Work Order Execution Report (P13430)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the WO From date: "Date Created"	
2. Enter the WO Thru date:	
DISPLAY OPTION:	
3. Identify how to print asset number.	
1 = Item Number (Default)	
2 = Unit Number	
3 = Serial Number	
PARTS STATUS:	
4. Enter the "Pending Parts Status" User Defined Code.	

58.23 Labor Utilization Report (P13440)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTION:	
1. Identify how to print asset number.	
1 = Item Number (Default)	
2 = Unit Number	
3 = Serial Number	
DATA SELECTION:	

Processing Option**Processing Options Requiring Further Description**

2. Enter the Work Order Date Range to be used in selecting work orders.

From:

Thru:

58.24 Parts Forecast Report (P13450)

Processing Option**Processing Options Requiring Further Description**

DATE RANGE:

1. Enter From Work Order Start Date:

Enter Thru Work Order Start Date:

PRINT SELECTION:

2. Identify how to print asset number.

1 = Item Number (Default)

2 = Unit Number

3 = Serial Number

3. Identify how to print component.

1 = Compnt Item No. short

2 = Component 2nd Number (Default)

3 = Component 3rd Number

BRANCH SELECTION:

4. Identify which branch to select the quantity on hand.

(Leave blank to select all branches.)

58.25 Equipment Parts List Report (P13410)

Processing Option**Processing Options Requiring Further Description**

PRINT SELECTION:

1. Identify how to print asset number.

1 = Item Number (DEFAULT)

2 = Unit Number

3 = Serial Number

DATA SELECTION:

2. Enter the Branch/Plant for Parts List Location.

58.26 Completed Maintenance Records (P12407)

Processing Option**Processing Options Requiring Further Description**

PRINT OPTIONS:

Processing Option	Processing Options Requiring Further Description
1. Choose which report format to print: '1' = Completed Maintenance (usually, statuses of '99'). '2' = Scheduled Maintenance (usually, statuses less than '99'). '3' = Mechanic's Worksheet (usually, status range of '50' to '70'). Note: DREAM Writer Data Selection determines which statuses are actually included on the report.	
2. Enter a '1' to print the procedure number's standard text. Leave blank (default) to print no standard text.	
3. Choose which asset number to print: '1' = Item number (default). '2' = Unit number. '3' = Serial number.	
4. Enter a '1' to print the assets by Location, page breaking by Location. Note: If selecting this option, Location should be high in the DREAM Writer data sequence list (for example Company, Location, Item Number; or Location, Item Number; and so forth).	

58.27 Mechanic's Worksheet (P12407)

Processing Option	Processing Options Requiring Further Description
PRINT OPTIONS:	
1. Choose which report format to print: '1' = Completed Maintenance (usually, statuses of '99'). '2' = Scheduled Maintenance (usually, statuses less than '99'). '3' = Mechanic's Worksheet (usually, status range of '50' to '70'). Note: DREAM Writer Data Selection determines which statuses are actually included on the report.	
2. Enter a '1' to print the procedure number's standard text. Leave blank (default) to print no standard text.	
3. Choose which asset number to print: '1' = Item number (default). '2' = Unit number. '3' = Serial number.	
4. Enter a '1' to print the assets by Location, page breaking by Location. Note: If selecting this option, Location should be high in the DREAM Writer data sequence list (for example Company, Location, Item Number; or Location, Item Number; and so forth).	

58.28 Scheduled Maintenance Records (P12407)

Processing Option	Processing Options Requiring Further Description
PRINT OPTIONS:	
1. Choose which report format to print: '1' = Completed Maintenance (usually, statuses of '99'). '2' = Scheduled Maintenance (usually, statuses less than '99'). '3' = Mechanic's Worksheet (usually, status range of '50' to '70'). Note: DREAM Writer Data Selection determines which statuses are actually included on the report.	
2. Enter a '1' to print the procedure number's standard text. Leave blank (default) to print no standard text.	
3. Choose which asset number to print: '1' = Item number (default). '2' = Unit number. '3' = Serial number.	
4. Enter a '1' to print the assets by Location, page breaking by Location. Note: If selecting this option, Location should be high in the DREAM Writer data sequence list (for example Company, Location, Item Number; or Location, Item Number; and so forth).	

58.29 Item Log - Actual Maintenance (P12450)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTION:	
1. Identify how to print asset number. 1 = Item Number (DEFAULT) 2 = Unit Number 3 = Serial Number	

58.30 Item Log - Planned Maintenance (P12450)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTION:	
1. Identify how to print asset number. 1 = Item Number (DEFAULT) 2 = Unit Number 3 = Serial Number	

58.31 Item Log - Problems vs Maintenance (P12450)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTION:	
1. Identify how to print asset number.	
1 = Item Number (DEFAULT)	
2 = Unit Number	
3 = Serial Number	

58.32 Item Log - Reported Problems (P12450)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTION:	
1. Identify how to print asset number.	
1 = Item Number (DEFAULT)	
2 = Unit Number	
3 = Serial Number	

58.33 Schedule & Message Detail (P3450)

Processing Option	Processing Options Requiring Further Description
START DATE:	
1. Enter the Report Start Date.	
If left blank, all dates will be printed.	
PRINT FORMAT:	
2. Enter the number of time periods to be printed up to 54 periods.	
3. Enter the number of past due weeks, (0-2).	Set to 2 if using Planning Fence Rule H.
If left blank, no past due periods will be printed.	
4. Enter the UDC for row descriptions.	
5. Enter '1' next to the sections of the report to be printed:	
a. MPS Time Series	
b. MPS Messages	
6. Enter a '1' to suppress the blank lines when printing the Time Series.	
7. Enter a '1' to summarize the supply and demand lines into one line each.	
8. Enter the UOM in which to print the quantities:	
1 = Primary UOM	
2 = Production UOM	
3 = Component UOM	
If left blank, quantities will be printed in Primary UOM.	

Processing Option	Processing Options Requiring Further Description
-------------------	--

MESSAGE DISPLAY FENCE:

9. Enter a '1' to print only items that have action messages inside the display fence or a '2' to print items that have ANY messages inside the fence (warnings included).

If left blank, the display fence will not be used; all items in the data selection will print.

58.34 PM Projection Print - Monthly (P13412)

Processing Option	Processing Options Requiring Further Description
-------------------	--

DATE SELECTION:

1. Enter the beginning date of the first period.

PERIOD SELECTION:

2. Enter a 'W' for Weekly period

'M' for Monthly period

'Q' for Quarterly Period.

PRINT OPTION:

3. Enter a '1' to print Item Number

'2' to print Unit Number

'3' to print Serial Number.

(Blank will default the Item Number)

4. Print the Parts List ('Y' or 'N')

(blank will not print Parts List)

FORECAST TYPE:

5. Enter the Forecast Type.

CRAFT SELECTION:

6. Enter a work center to be used in selecting which PMs to project. Only those PMs with a model work order that uses that work center will be selected.

58.35 PM Projection Print - Quarterly (P13412)

Processing Option	Processing Options Requiring Further Description
-------------------	--

DATE SELECTION:

1. Enter the beginning date of the first period.

PERIOD SELECTION:

2. Enter a 'W' for Weekly period

'M' for Monthly period

'Q' for Quarterly Period.

PRINT OPTION:

Processing Option	Processing Options Requiring Further Description
3. Enter a '1' to print Item Number '2' to print Unit Number '3' to print Serial Number. (Blank will default the Item Number)	
4. Print the Parts List ('Y' or 'N') (blank will not print Parts List)	
FORECAST TYPE:	
5. Enter the Forecast Type.	
CRAFT SELECTION:	
6. Enter a work center to be used in selecting which PMs to project. Only those PMs with a model work order that uses that work center will be selected.	

58.36 PM Projection Print - Weekly (P13412)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the beginning date of the first period.	
PERIOD SELECTION:	
2. Enter a 'W' for Weekly period 'M' for Monthly period 'Q' for Quarterly Period.	
PRINT OPTION:	
3. Enter a '1' to print Item Number '2' to print Unit Number '3' to print Serial Number. (Blank will default the Item Number)	
4. Print the Parts List ('Y' or 'N') (blank will not print Parts List)	
FORECAST TYPE:	
5. Enter the Forecast Type.	
CRAFT SELECTION:	
6. Enter a work center to be used in selecting which PMs to project. Only those PMs with a model work order that uses that work center will be selected.	

58.37 Frequency of Occurrence (P13419)

Processing Option	Processing Options Requiring Further Description
DATA SELECTION:	
1. Enter the From Date:	

Processing Option	Processing Options Requiring Further Description
-------------------	--

2. Enter the To Date:

58.38 Planning (P3350)

Processing Option	Processing Options Requiring Further Description
-------------------	--

REPORT FORMAT:

1. Enter the Capacity Mode to use:

1 = Resource Requirements Planning

2 = Rough Cut Capacity Planning

3 = Capacity Requirements Planning

2. Enter the Unit of Measure.

If left blank, 'HR' will be used.

3. Enter the Start Date.

If left blank, the system date will be used.

4. Enter a 'Y' by the sections of the report to be printed:

a. Capacity Requirements

b. Capacity Messages

5. Enter the number of periods.

6. Enter the UDC table to use for row descriptions.

Inventory Concepts and Setup

This appendix contains these topics:

- [Section A.1, "About Inventory Concepts"](#)
- [Section A.2, "About the Inventory Item Master"](#)
- [Section A.3, "About Inventory Setup"](#)

This appendix contains important information that you need if you use the Inventory Management system to manage parts inventories.

A.1 About Inventory Concepts

You can plan for future parts needs by reviewing information that the system provides about parts and part quantities. For example, you can monitor quantity information about how many parts are on demand, available in supply, and available to be promised. To use quantity information to determine your current and future inventory needs, you need to understand the following concepts.

A.1.1 Stocking Types

In most inventory environments, such as a manufacturing environment, non-stock parts are rare. But, within the maintenance organization, the demand for parts is often not predictable, and it is impractical to stock every part for which there might be a future demand. Generally, maintenance planners consider inventory as a way to handle emergency replacement parts and to act as a temporary holding area for stock and non-stock parts.

Within the maintenance organization, it is necessary to identify three different stocking types:

Type	Description
Stock parts	The most vital parts for which you know there is a predictable demand, such as parts required for routine scheduled maintenance tasks. Typically, you want to keep a physical inventory of these parts.
Pseudo non-stock parts	Parts for which you do not need to keep a physical on-hand quantity, such as parts required for future maintenance tasks or parts that are easily and quickly acquired. Typically you don't want to keep a physical inventory of such parts. However, you want to maintain inventory records to assist in planning and to simplify purchasing. You can set up pseudo non-stock parts with an inventory master record and indicate an on-hand quantity of zero.

Type	Description
Non-stock parts	Parts for which you rarely have a need and for which you do not need an inventory master.

A.1.2 On-Hand Quantity vs. Available Quantity

On-hand quantity refers to the number of parts that are physically in stock in the primary unit of measure. On-hand quantity of parts can be affected by:

- Variances recorded following a physical inventory
- Daily removals, additions, or transfers of parts
- Shipment confirmations or updated sales information
- Locations with lots on hold, such as parts requiring inspection or placed in quarantine

Available quantity refers to the number of parts that you can use based on user defined calculations. You determine how the system calculates part availability by defining the factors that subtract from, or add to, the available quantity of a part. This calculation can include quantities that do not immediately affect on-hand amounts.

For example, you can set up the availability calculation to subtract any quantities that are committed to work orders and add any quantities that are on purchase orders or in transit.

A.1.3 Commitments

When you set up general planning constants, you can specify whether the system uses hard or soft commitment to commit parts to a work order.

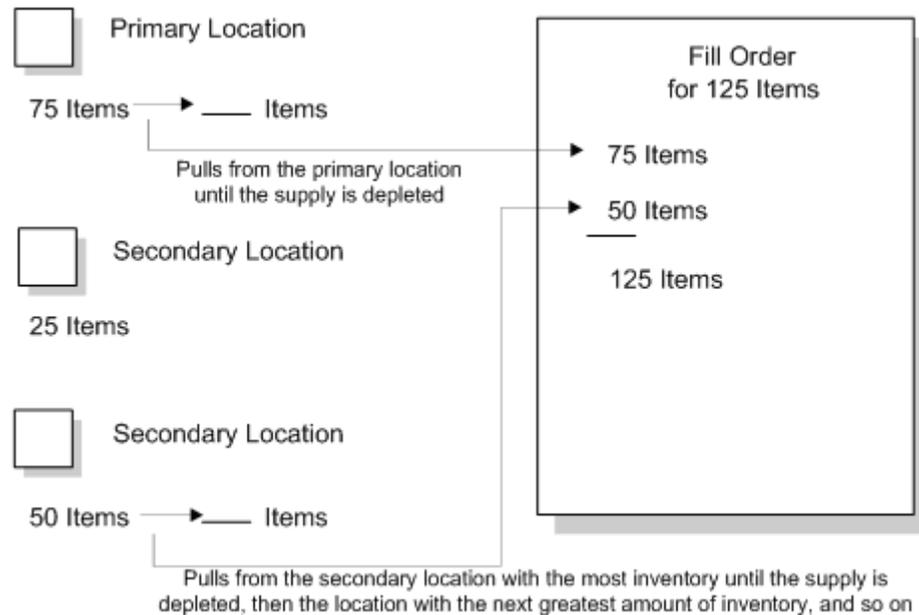
When you specify hard commitment, the system:

- Indicates an actual reduction in inventory at the point that the maintenance task creates a demand for the part
- Specifies a location from which to remove parts

When you specify soft commitment, the system:

- Does not indicate an actual reduction in inventory at the point that the maintenance task creates a demand for the part
- Does not specify a location from which to remove the part

The following graphic illustrates how the Inventory Management system commits inventory:

Figure A-1 How the Inventory Management System Commits Inventory

A.1.4 Supply and Demand Quantities

The system uses supply and demand inclusion rules to calculate the supply and demand quantities for an inventory part. Unlike a manufacturing environment where work orders create a supply of parts or materials, work orders in a maintenance environment create a demand for parts.

Starting with the requested date on the work order parts list, the system calculates the demand quantity from the following sources:

- Work order requirements and parts lists - The quantity required minus the quantity issued
- Safety stock - Any quantity reserved as protection against fluctuations in demand and supply

Starting with the requested date on purchase orders, the system calculates the supply quantity from the following sources:

- On-hand inventory - The quantity on hand minus hard commitments and quantities on work orders
- Purchase orders - The quantity entered on purchase orders

A.2 About the Inventory Item Master

To ensure that maintenance planning features function properly, several fields on Inventory Item Master and Item Branch Information require special attention. You can access both screens within the Inventory Management system.

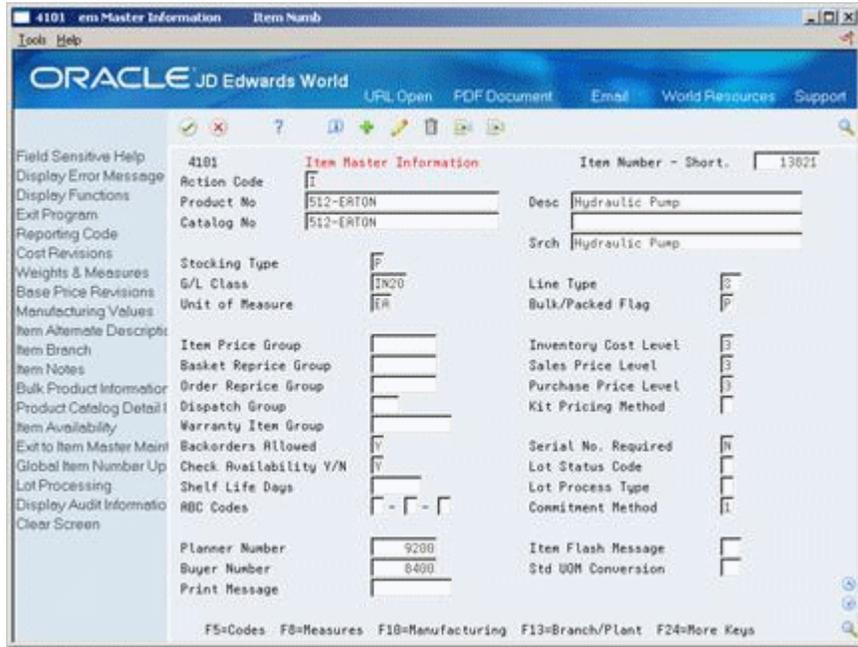
Navigation

From Inventory Management (G41), choose 2

From Inventory Management (G4111), choose Item Master Information

A.2.1 Entering Item Master Information

Figure A-2 Item Master Information screen



You must complete the following fields for each maintenance part for which you want to create a master record.

Note: The values you enter in these fields will be default values in the same fields on the Item Branch Information screen.

Field	Explanation
Stocking Type	<p>A user defined code that indicates how a part is normally stocked.</p> <p>The stocking type that you enter for maintenance parts must have an M or a P as the second description line.</p> <ul style="list-style-type: none"> ■ M: Parent part number. The system uses this stocking type when it processes inventory parts for planning. ■ P: Individual parts or components of a parent part. <p>For example, assume you are creating master information for a hydraulic PM kit and each part within the kit. The parts include a motor and a filter. Enter a stocking type that includes M as the second line of description for the PM kit. Enter a stocking type that includes P as the second line of description for the motor and the filter.</p> <p>Do not enter a stocking type with a second description line of K (kit). Kit is used to process sales order items.</p>

Field	Explanation
G/L Class	<p>A user defined code that controls which general ledger accounts receive the monetary amount of inventory transactions for this item.</p> <p>You might need to set up an additional G/L class code for parts inventory if you use the Inventory Management system for other applications, such as manufacturing.</p>
Line Type	<p>A code that controls how the system transacts lines on a transaction. The line type:</p> <ul style="list-style-type: none"> ■ Controls which system the transaction interfaces with, such as General Ledger, Inventory, Accounts Payable, and so on. ■ Specifies conditions under which the system prints a line on reports and includes a line in calculations. <p>You should choose a line type according to the stocking method for the part. For example, if you are creating a master for a pseudo non-stock item (one that you don't want to keep a physical on-hand quantity, but that you still want to track as an inventory item) choose a line type that interfaces with inventory.</p> <p>Line type N has special logic the system uses to process parts that are truly non-stock and for which you do not maintain inventory master information.</p>

To use parts planning functions in Equipment/Plant Maintenance, you must enter a value in at least one of the following fields for each part:

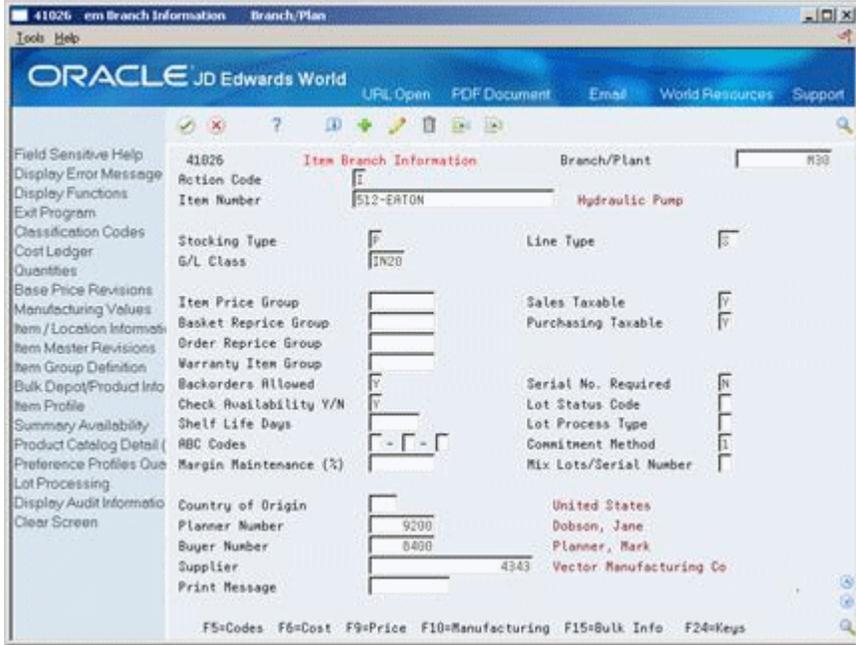
- Planner Number
- Buyer Number
- Master Planning Family

The Planner Number and Buyer Number fields are located on the Item Master screen, as well as the Item Branch Information screen. The Master Planning Family field is located on the Classification Codes screen and is discussed later in this appendix.

Field	Explanation
Planner Number	<p>The address number of the material planner for a part.</p> <p>You must enter a planner number to be able to run parts inquiries and searches by planner.</p>
Buyer Number	<p>The address number of the person responsible for setting up and maintaining the correct stocking levels for inventory parts.</p> <p>You must enter a buyer number to be able to run parts inquiries and searches by buyer.</p>

A.2.2 Entering Item Branch Information

Figure A-3 Item Branch Information screen

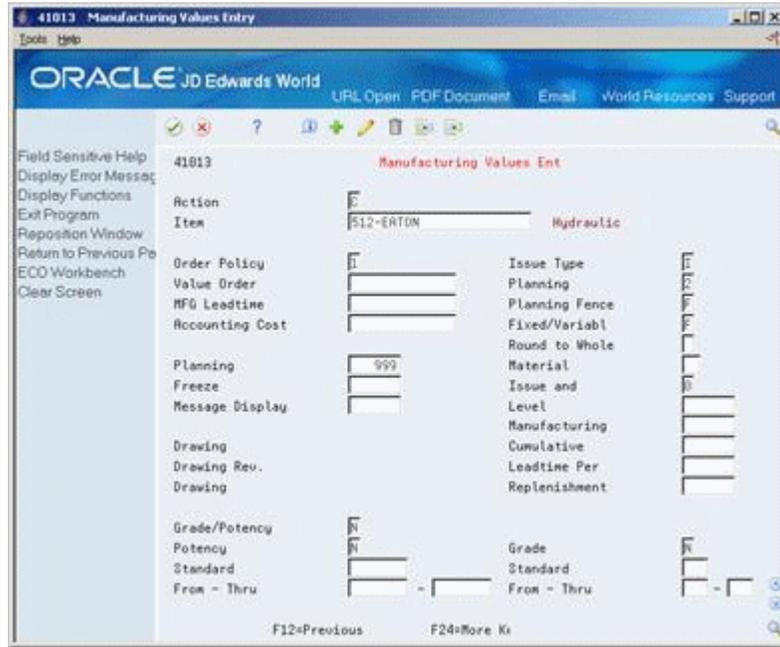


You must enter a value in the Supplier field on the Item Branch Information screen for each part. You can access this screen directly from the Item Master screen.

Field	Explanation
Supplier	The address number of the preferred provider of this item at this branch or plant. JD Edwards World recommends that you enter a supplier for each branch or plant.

A.2.3 Entering Manufacturing Values

Figure A-4 Manufacturing Values Entry screen



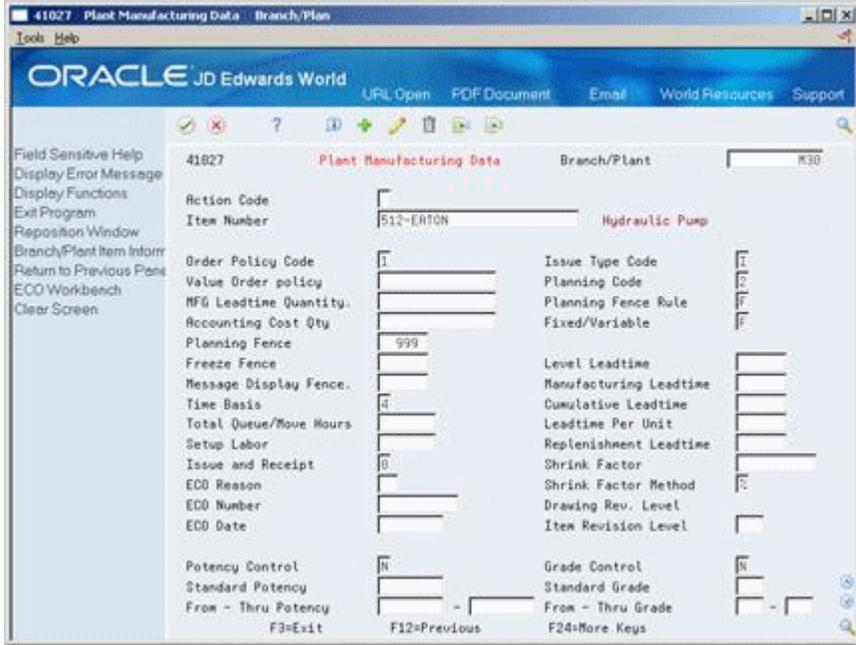
From the Item Master screen in the Inventory Management system, you can access the Manufacturing Values Entry screen (F10). You must complete the following fields on this screen to specify the rules by which the system plans for, orders, and issues parts.

Note: When you enter values in these fields, they automatically become default values in the same fields on the Plant Manufacturing Data screen.

Field	Explanation
Order Policy Code	A code that designates the rules for reordering in the Requirements Planning system. JD Edwards World recommends that you enter a 1 in this field.
Issue Type Code	A code that defines how each item in the bill of material is issued from stock. With the exception of floor stock items, such as small hardware, fasteners, and so on, JD Edwards World recommends that you enter an I in this field to indicate a manual issue for maintenance parts.
Planning Code	A code that indicates how the system processes this item. JD Edwards World recommends that you enter a 2 in this field.

A.2.4 Entering Plant Manufacturing Data

Figure A-5 Plant Manufacturing Data screen



You can access the Plant Manufacturing Data screen directly from the Item Branch Information screen in the Inventory Management system. You must enter a value in the Time Basis field for each part to ensure that the system calculates the time required for routing steps based on hours per operation.

Field	Explanation
Time Basis	A code that identifies the time basis or rate to use for setup, machine, or labor hours entered for any routing step. JD Edwards World recommends that Equipment/Plant Maintenance users enter a U in this field.

A.2.5 Entering Classification Codes

Figure A-6 Item Branch Class Codes screen

To aid in parts planning and inquiry functions, you can assign each part to a master planning family. If you did not enter a planner number or a buyer number on either the Item Master screen or the Item Branch Information screen, you must enter a value for the master planning family. The Master Planning Family field is located on the Classification Codes screen. You can access this screen from either the Item Master screen or the Item Branch Information screen in the Inventory Management system.

Field	Explanation
Master Planning Family	A code under which you can organize logically related parts. For example, you can organize parts by type, location, machine, and so on.

A.3 About Inventory Setup

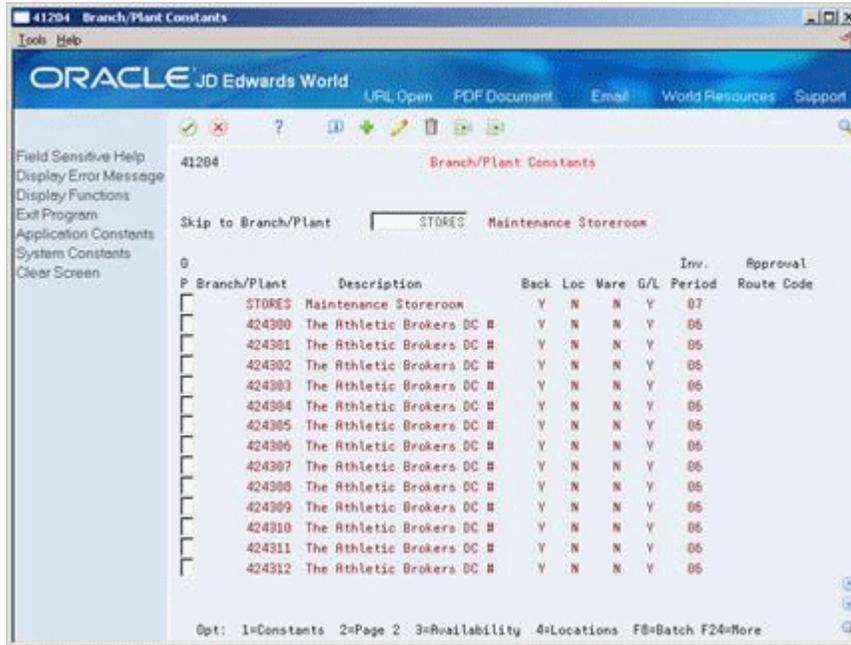
The following Inventory Management setup tasks have special implications for Equipment/Plant Maintenance users:

- Setting up Branch or Plant constants
- Setting up stocking type codes (user defined code, system 41, type I)

In addition to these tasks, setting up line types in the Purchase Management system has special implications for Equipment/Plant Maintenance users.

A.3.1 Setting Up Branch/Plant Constants

Figure A-7 Branch/Plant Constants screen



When you set up constants for each branch or plant, you should enter values in the following fields to ensure that inventory transactions create journal entries in the general ledger. In addition, you can specify a description for inventory transactions.

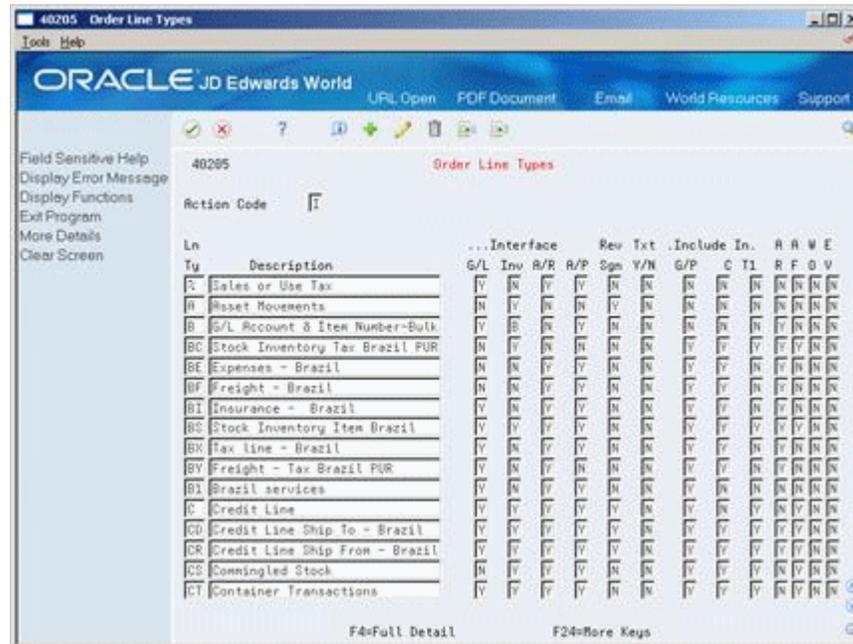
Field	Explanation
Interface G/L (Y/N)	Enter a Y to ensure that inventory transactions processed through this branch or plant create general ledger entries.
General Ledger Explanation	Depending on your reporting needs, you can specify the description that appears on the second line of the general ledger journal entry for inventory transactions: Enter a 1 for the item master description (part name) Enter a 2 for the primary item number (part number)
Update Units to G/L	Depending on your reporting needs, you can specify that the system enters both amounts and units for inventory transactions on the Account Ledger table (F0911).

A.3.2 Setting Up Stocking Type Codes

When setting up stocking type codes (system 41, type I) for maintenance parts, you must enter a P (Purchased) in the second description line. Do not enter a K (Kit). This code is reserved for sales order processing.

A.3.3 Setting Up Line Types

Figure A-8 Order Line Types screen



Line types control how parts transactions interface with the General Ledger and the Inventory Management system. Specifically, the line type that you assign to a part is a code that:

- Controls which of the following four systems that the transaction interfaces with:
 - · General Ledger
 - · Inventory Management
 - · Accounts Receivable
 - · Accounts Payable
- Specifies the conditions for which a line is printed on reports
- Specifies the conditions for which a line is included in calculations

You set up line types in the Procurement system. Depending on your planning and reporting needs, you might need to set up an additional line type to differentiate pseudo non-stock part transactions from genuine non-stock part transactions.

Caution: You should be thoroughly familiar with order line types before you add or modify them. Extreme damage to your system can occur if you do not set up order line types with precision and logic.

See Also:

- Setting Up Order Line Types in the *JD Edwards World Procurement Guide*

The following fields on Order Line Types have special significance for Equipment/Plant Maintenance users.

Field	Explanation
Interface with G/L (Y/N)	<p>A code that indicates whether the system reflects the monetary or unit value of any activity containing this order line type in the general ledger.</p> <p>JD Edwards World recommends that Equipment/Plant Maintenance users enter a Y in this field.</p>
Interface with Inventory	<p>A code that identifies the type of interface to the Inventory Management system. Valid codes are:</p> <p>Y – The system reflects the monetary or unit value of any activity containing this line type in inventory. The system edits the item you enter to ensure that it is a valid item.</p> <p>A – The system recognizes the number entered as a G/L account number. This code is used in purchasing only.</p> <p>B – The system edits the item and the G/L account when using format 4 in purchase order entry. The system retrieves price data from the inventory tables, but the system does not update the quantity on the purchase order. This code is valid only when the Interface with G/L code is set to Y (yes). Budget checking is fully functional with this interface type.</p> <p>D – The item in this line is an inventory item that will not affect availability or quantities.</p> <p>N – The item is not an inventory item.</p>

Import Mass Data into Equipment Plant Maintenance

Two Equipment Plant Maintenance interactive programs can run in batch mode and accept data from a Z file, allowing you to process mass amounts of data from an outside source easily and efficiently using existing programs to validate the data.

You can process any number of records to add, change, or delete. You also have the advantage of:

- Data selection to limit the records you want to process.
- Processing options that allow you to choose the version of the interactive program to process the records.
- Error report printing.

See:

- Import Using Z File Processing in the *JD Edwards World Technical Tools Guide* for detailed information about Z file processing.
- Overview to Import/Export in the *JD Edwards World Technical Tools Guide* for information about importing data into the system.

The following table includes the Equipment Plant Maintenance Z file processing programs.

Program	Program Name	Z File Program	Z File
P12115	Transfer Processing	P12115Z	F12115Z
P12120	Meter Readings	P12120Z	F12120Z

Navigation

From Equipment/Plant Management (G13), enter 27

From Advanced Operations (G1313), choose an option

Technical Considerations

The Location Transfer - Z File program (P12115Z) updates the Location Tracking (F1204), Location History (F1210), and Asset Master (F1201) files.

The Meter Readings - Z File program (P12120Z) updates the Asset Balance (F1202) and Account Ledger (F0911) files.

Processing Options

See the appropriate set of Z file processing options:

- [Section 53.16, "Location Tracking Z File \(P12115Z\) \(Release A9.3 Update\)"](#)
- [Section 54.7, "Meter Reading Z File \(P12120Z\) \(Release A9.3 Update\)"](#)

Data Selection

Do not change the existing data selection. The Processed Y/N field is set to NE Y. This prevents the program from processing records more than once.

You can add additional selections to limit the data.

Data Sequence

Do not change the data sequence.

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