WORLDSOFTWARE®

UCIS Work Management

JDEdwards®

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Where Do I Look?

Online Help
- Program
- Form
- Field

CD–ROM Guides

Guides

Technical Foundation

System Administration and Environment Fundamentals

- Understanding Your Environment
- Creating and Maintaining Environments
- Setting Up Security
- Upgrading Your System

Common Foundation

Prerequisite J.D. Edwards Software Fundamentals

- Using Menus
- Getting Help
- Customizing Data
- Reporting

Important Note for Students in Training Classes

This guide is a source book for online helps, training classes, and user reference. Training classes may not cover all the topics contained here.

Welcome

About this Guide

This guide provides overviews, illustrations, procedures, and examples for the current release of J.D. Edwards software. Forms (screens and windows) shown are only examples. If your company operates at a different software level, you might find discrepancies between what is shown in this guide and what you see on your screen.

This guide includes examples to help you understand how to use the system. You can access all of the information about a task using either the guide or the online help.

Before using this guide, you should have a fundamental understanding of the system, user defined codes, and category codes. You should also know how to:

- Use the menus
- Enter information in fields
- Add, change, and delete information
- Create and run report versions
- Access online documentation

Audience

This guide is intended primarily for the following audiences:

- Users
- Classroom instructors
- Client Services personnel
- Consultants and implementation team members

Organization

This guide is divided into sections for each major function. Sections contain chapters for each task or group of related tasks. Each chapter contains the information you need to accomplish the task, run the program, or print the

report. Chapters normally include an overview, form or report samples, and procedures.

Section

Chapter
- Overview
- Tasks

- What You Should Know About
- Field Descriptions
- Processing Options
- Test Yourself

When it is appropriate, chapters also might explain automatic accounting instructions, processing options, and warnings or error situations. Some chapters include self-tests for your use outside the classroom.

This guide has a detailed table of contents and an index to help you locate information quickly.

Conventions Used in this Guide

The following terms have specific meanings when used in this guide:

- *Form* refers to a screen or a window.

- *Table* generally means "file."

We assume an "implied completion" at the end of a series of steps. That is, to complete the procedure described in the series of steps, either press Enter or click OK, except where noted.

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UCIS Work Management Overview

System Overview

The J.D. Edwards Utility Customer Information System (UCIS) is designed to satisfy the billing and general database requirements for metered gas, water, and electric utilities. It provides the information technology to help your employees deliver responsive, reliable customer service. UCIS supports superior customer service, enhances work flow, and ensures financial accountability.

UCIS has two major sets of features:

- Work management, described in detail in this guide
- Customer service, described in detail in the *UCIS Customer Service Guide*

Work Management

You can use the work management features of UCIS to manage all aspects of work flow within your organization, such as:

- Creating and tracking premise information
- Planning and scheduling work orders
- Managing meter information
- Managing automated meter reading functions

The work management features of UCIS include the following integrated modules:

Service Addresses and Meters

UCIS enables you to maintain records on all service drops and service addresses, including the meter type, size, and date installed, as well as date, time, and nature of customer contacts or complaints. Information is recorded for single or multimeter installations.

The meter section of the module is linked to the J.D. Edwards Equipment/Plant Maintenance system, indicating a meter's status — in service, in repair, or on the shelf. This integration also allows the entire delivery network to be represented as a hierarchy of parent and component relationships among fixed assets.

Meter Readings

UCIS stores detailed information about each customer's meter readings and historical consumption information. It enables you to accomplish the following:

- Upload or download information to and from third-party, hand-held meter reading devices

- Track occurrences of exceptionally high or low readings and billings

- Print exception reports

- Adjust billings

In addition, you can implement the following time and labor saving features:

- Define meter reading routes and sequences

- Capture and upload notes entered into the hand-held reading device

- Exclude special customers such as seasonal accounts from regularly scheduled reading cycles

Work Orders

A version of J.D. Edwards Work Orders system specific to utilities enables you to schedule and record work performed by installation and maintenance crews. You improve labor efficiency and enhance customer service because:

- Work orders are prepared in batch or real-time and directed to the appropriate department

- Standard customer letters communicating changes or updates are generated by the system automatically

- Billable service charges are posted against the appropriate service agreements automatically

- Work order histories are maintained by service agreement, date, and service representative

- Job status, cost account details, account ledger inquiries, and online executive reports and summaries are tracked automatically

Customer Service

The customer service features of UCIS include the following integrated modules:

Customers and Accounts

UCIS enables you to define in a systematic format the relationship with your customers, including who they are, their locations, and the nature of their service. Each customer can be cross-referenced by name, address, account number, and tax identification number.

The customers and accounts module is linked to the service addresses and meters module of the work management features to define the equipment, facilities, or both, listed on each service agreement.

The customers and accounts module also enables you to process exceptions such as exclusion of billings or payment notices for a specific period. In addition, a link to the Address Book system enables you to record a wide range of customer demographics and statistics.

Customer Billing and Receipts

UCIS automatically generates customer statements at the end of each billing cycle for service agreements assigned to the cycle. In addition, you can create bills manually on demand. Because the system is integrated, entries are updated automatically in the Accounts Receivable and General Accounting systems.

Additional customer billing features include:

- Allowances for budget billing and estimated meter readings, with reconciliations and adjustments
- Multiple services and miscellaneous charges based on fixed or variable rates, zone differentials, or combinations of methods
- Calculating prorated charges for new or closed accounts
- Calculating penalties or special assessments for excessive consumption
- Tracking at risk, delinquent, and bad debt accounts
- Generating and recording collection letters, overdue notices, payment plans, and collection agency activity
- Generating accounts receivable and general ledger journal entries by receipt and revenue type
- Posting payments and adjustments immediately on customer records and in the general ledger
- Sorting bills by nine-digit ZIP codes to receive best postal rates

System Integration

From UCIS, you can link to other J.D. Edwards systems that your organization uses. System integration helps to ensure that work management information is consistent throughout your organization. Because J.D. Edwards systems are integrated, you only need to enter key information once. For example, when you create master records for meters, the system stores the information in a table that can be accessed by other systems, including:

- General Accounting
- Inventory Management

- Equipment/Plant Management

The following table briefly describes each J.D. Edwards system that is integrated with UCIS.

Address Book	You can use Address Book to record and track a wide spectrum of customer demographics and statistics. Every J.D. Edwards system works with the Address Book system to retrieve up-to-date customer, employee, supplier, and other applicable name and address information.
General Accounting	When you enter transactions (including billing transactions), you must process them through the general ledger.
Accounts Payable	Customer refunds and construction deposit refunds are processed through the Accounts Payable system.
Accounts Receivable	You use the Accounts Receivable system to process customer billing and cash receipts for all utility services.
Payroll and Time Accounting	You can use Payroll and Time Accounting systems to record and track labor charges to a work order. For example, you can review labor charges by: • Project • Person • Detailed task
Fixed Assets	You can use the Fixed Assets system to track and report on all assets in your organization, including meters. You can access J.D. Edwards Spreadsheet Tool for Asset Reporting (STAR) through the Fixed Asset system. Use this report writer to create custom reports of your assets.
Procurement Management	You can create purchase orders directly from the work order parts list. When you create a purchase order, the system automatically enters the work order number on the following: • Accounts payable entry • General ledger • Fixed Assets ledger
Inventory Management	You can track and control the allocation of parts and supplies to work orders.

| **Equipment/Plant Management** | You can use the Equipment/Plant Management system to track and control all aspects of your maintenance organization, including: |

- Preventive maintenance scheduling
- Corrective maintenance scheduling
- Labor resource and parts planning

| **Resource and Capacity Planning** | You can use features in the Resource and Capacity Planning system to monitor and manage the load on work centers and ensure that resources are always available. |

Features

The work management features of UCIS are designed to satisfy the requirements of utilities in a variety of ways. You can coordinate all aspects of workflow for the following:

- Service address and meter management

- Automated meter reading management

- Work order management

| **Service address and meter management** | You maintain records on all service drops and service addresses, including the meter type, size, manufacturer and date installed. You can also track site profile information for each premise, as well as weather conditions for each area in your delivery network. In addition, you can: |

- Enter and track load detail information for each meter position
- Maintain meter history by service address, meter position, or individual meter
- Quickly locate any meter in your organization, regardless of its status

Automated meter reading management

You maintain detailed information on each customer's meter readings, as well as historical consumption information. In addition you can:

- Upload and download information from a hand-held meter reading device, such as the Itron® DataCap
- Track occurrences of exceptionally high or low readings
- Print exception reports
- Define meter reading routes and route sequences
- Easily re-route meters or change the sequence of a meter route
- Capture and upload notes that are entered into the hand-held reading device
- Generate work orders from the hand-held reading device
- Exclude special customers from a scheduled reading cycle, such as customers with seasonal accounts

Work order management

You prioritize and control short-term projects, such as

- Service connects and disconnects
- Outages
- Meter service
- Appliance repair
- Inspection and code enforcement

The UCIS work order module helps manage such projects by:

- Simplifying work order setups for a single job or a group of jobs
- Providing multiple levels of responsibility and task tracking
- Providing flexible scheduling and expediting of work orders
- Monitoring high priority and emergency work orders to ensure rapid and reliable response

You can enhance the workflow by indicating multiple statuses within the work order status flow and specifying edit rules and behaviors for the order, depending on its status within the status flow.

When you add a work order or change its status, edit rules trigger the system to access and audit various fields related to the work order in order to verify the presence of conditional information.

Behaviors trigger the system to automatically perform specific functions at the appropriate point in the work order status flow, either interactively or in the background.

Work Management Tables

Primary Tables and Descriptions

Service Address Master (F1901) — Stores basic information about each service address, such as:

- Service address number
- Street address
- Postal code

Service Agreement Master (F1902) and Service Agreement Connections (F1903) — Store basic information about each account, such as:

- Account ID
- Customer number
- Billing information
- Service addresses and meter positions that apply to the agreement

Meter Positions (F1905) — Stores information for each meter position, such as:

- Service type
- Install Date
- Meter number
- Estimating factors

Meter Readings (F1930) — Stores meter reading information for each meter.

Item Master (F1201) — Stores basic information about each meter, such as identification numbers and date acquired.

Work Order Master (F4801) — Stores information about each work order, such as:

- Description of work
- Requested and schedules dates
- Investigation code

Secondary Tables and Descriptions

Installed Meter History (F1906) — Maintains a history of which meters occupied which meter positions over time.

Load Detail (F1907) — Stores information about the appliances that account for the consumption at a meter position.

Master Schedule (F1909) — Stores records for each day on which bills are generated.

Profile Types of Data (F1952)	Stores user defined supplemental information for customers, service agreements, and service addresses.
Utility CIS Constants (F1990)	Stores information that remains constant across the entire system, such as the default company for billing agreements and the number of billing periods.
Investigation Code Maintenance (F1991)	Stores attributes and requirements for types of work orders based on the investigation code.
UCIS Security (F1993)	Stores users or groups of users and their specific authorities within the system.
Work Order Instructions (F4802)	Stores descriptive text and the various record types that are defined in the user defined codes, such as a description of the request and access and key information
Work Order Supplemental Database (F48092)	Stores additional information about work orders in either columnar or narrative format.
Work Order Extension (F4819)	Stores additional information about work orders, such as scheduling information and bill item charges.
Work Order Activity Rules (F4826)	Maintains information about the sequence of allowed statuses through which a work order must pass.
Work Center Cross Reference (F4872)	Stores information about how work orders are assigned to work centers, based on: • Type of job • Geographic location
Schedule Pool Control by Work Center (F4873)	Maintains scheduling capacity information for each work center.
Time Slot Sequence (F4875)	Stores information about the search sequence that the system uses to assign work by time slot during a given day.
Scheduling Audit (F4876)	Maintains a history of work orders that were scheduled over-capacity, or when the corresponding investigation code was turned off.
Work Order Edit Rules (F4891)	Stores information about which edit rules are in effect, based on work order type, work group, and status.

Behavior Maintenance (F4892)	Stores information about which behavior rules are in effect, based on work order type, work group, and status.
Work Order Behaviors Executed (F4893)	Maintains records of behaviors executed for each work order.
Edit Rule/Behavior Failed (F4894)	Maintains records of failed edit rules and behaviors for each work order.

UCIS Work Management Menu Overview

The following graphic does not imply navigation among menus.

```
          Utility Customer
        Information System
                G19
```

Daily Processes

```
  Service Addresses            Work                  Meter
    and Meters                 Orders                Readings
      G1913                    G1913                  G191
```

Advanced and
Technical Processes

```
     System            UCIS Technical and           Profile
     Setup            Advanced Operations            Setup
     G1941                   G193                     G1944
```

```
          Work Order
        Monitor Control
             G1931
```

Setup Processes

```
           Utility CIS
             Setup
              G194
```

```
     System              Work Order               Profile
     Setup                 Setup                   Setup
     G1941                 G1943                    G1944
```

```
          Work Order
        Scheduling Setup
            G19431
```

Daily

Premise Creation

About Premise Creation

You establish the location of service delivery sites by creating premises. You maintain premise information independent of customer information. Typically a premise includes a service address but you can create premises that aren't actual addresses, such as fire hydrants or street lights. For each premise that you create, you can track site information, such as:

- Lot
- Block
- Tract
- Town code
- Area of town
- Cross streets
- Grid location number
- Tax rate

In addition, you can track meter and appliance history for each premise.

Creating a Premise

You must create a premise for every point in your utility network to which services can be delivered or connected. The foundation of a premise is the service address. The system uses the information you provide when you create service addresses to:

- Track and report on the physical attributes of the meter position
- Provide a location from which to track meter information and appliance load
- Provide information for service agreements and work orders
- Create estimated meter readings, based on the location of the address

The system stores service address information separately from customer information. This enables you to track information about a premise, regardless of the presence or status of a customer's service agreement.

After you add a new service address, you can enter meter positions for the address. You can also add meter positions for an existing service address at any time. You can add any number of new meter positions to a service address, depending on the requirements of the location. For example, a service address that serves a single family residence might require only one meter position, but a service address that serves a shopping mall might require multiple meter positions.

After you create meter positions for a service address, you can enter load detail information about the appliances served by each meter position.

Creating a premise includes the following tasks:

❏ Locating a service address

❏ Creating a service address

❏ Entering additional meter positions for a service address

❏ Entering load detail information for a meter position

❏ Revising the sequence of a meter route

Locating a Service Address

From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Service Address Search

The first step to creating a premise is to verify that no service address currently exists at the location at which you want to establish the premise. You do this by performing a search for a service address, using the location of the new premise as your search criteria.

▶   **To locate a service address**

On Service Address Search

1. To search for an existing service address, complete one or a combination of the following fields:

    -   Street Number
    -   Street Name
    -   Town Code
    -   Block
    -   Lot
    -   Parent Address
    -   Category Codes 1 – 5

2. Choose the Service Address Information function.

The system displays Service Address Information only if a service address exists that matches the selection criteria you entered.

Field	Explanation
Street Number	Identifies the sequential location portion of a street address.
Street Name	Identifies the name portion of a street address.
Town Code	A user defined code (19/TC) that identifies the town or city in which a service address is located. This code is used to expedite searches for service addresses, and it plays a role in determining the work center when you are scheduling work order for a service address.
Block	A field used in location reporting. The block is used in conjunction with the lot and unit to describe a parcel of land, usually within a subdivision.
Lot	A field used in location reporting. The lot is used in conjunction with the block and unit to describe a parcel of land, usually within a subdivision.
Parent Address	A service address number that serves as an umbrella for one or more individual service addresses. This number is for reporting purposes only.
Category Codes	One of many reporting codes that you can assign to a service address, meter position, bill item, load detail record, or bill item table. Use these codes to identify records for reports, mailings, and so on. Category codes are user defined (19/01 through 40). Examples: Category code 01 – Power Plant Assignment Category code 02 – Customer Service Representative Category code 03 – Credit Officer The Service Address file uses category codes 1-10. The Meter Positions file uses category codes 11-13. The Bill Item table uses category codes 17-19. The Load Detail table uses category codes 21–35. The Bill Item Table table uses category codes 36–40.

What You Should Know About

Valid search field combinations

Some search fields must be used in combination with other search fields. The following combinations are valid:

- Street Name and Town Code
- Street Number and Street Name
- Street Number, Street Name, and Town Code
- Town Code and Block
- Town Code, Block, and Lot

Some fields must be used exclusively. They are as follows:

- Parent Address
- Skip To: Service Address
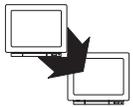
Creating a Service Address

From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Service Address Information

After you have verified that a service address is not established at a particular premise, you can create a new service address.

▶ **To create a service address**

On Service Address Information

1. If the location has a postal code, complete the following fields:

    *   Postal Code

    *   Town Code (if applicable)

2. If the location does not have a postal code, complete the following fields:

    *   Street Address

    *   City

    *   Town Code

3. Complete the following optional fields:

    *   Parcel Number

    *   Weather Area

4. Choose Add.

    After you update the service address information, the system displays the Meter Position form. You can continue and enter a meter position for the service address now, or you can exit from this form to create the service address without a meter position.

    A processing option specifies whether the system displays the Service Address Category Codes form, the Meter Position form, both forms, or neither form after you add a service address.
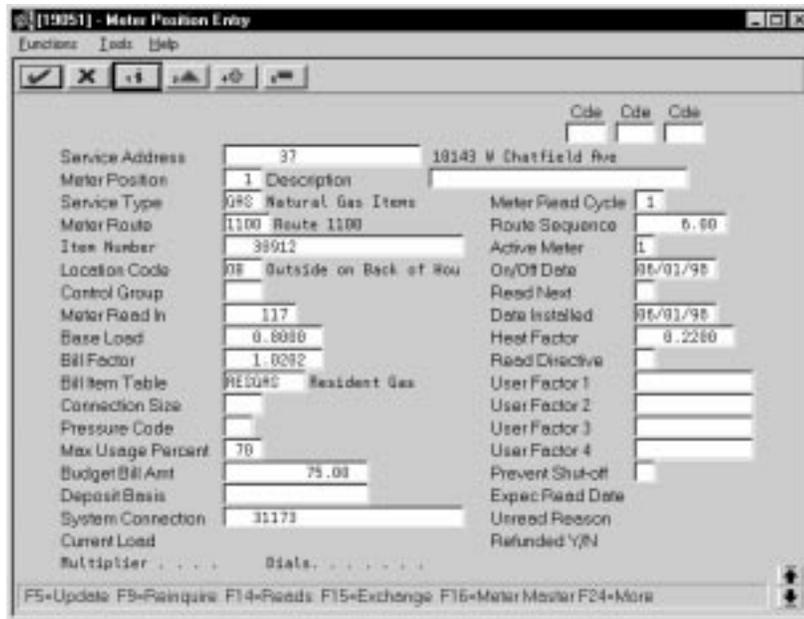
5. On Meter Position Entry, complete the following field to add a meter position:

   - Meter Read Cycle

6. For billing purposes, complete the following optional fields:

   - Service Type
   - Base Load
   - Heat Factor
   - Bill Factor

Field	Explanation
Postal Code	The US ZIP code or the postal code attached to the address for delivery in any other country. This code is used as the low end value when doing Postal Code Transaction range processing. . . . . *Form-specific information* . . . . Entering all or part of a postal code can automatically supply a default city, county, state, and country from the Postal Code Revisions table (F0117). It also allows you to use a default for the town code from the Town Code Cross Reference table if only one town is associated with the given city. Otherwise, a window appears to allow you to choose the correct town. If you do not enter a postal code, the system highlights the Postal Code field. This is a soft error. Press Enter to accept the information.

| Field	Explanation
City	The city associated with the address.
Parcel Number	A 20 character alphanumeric code used as an alternate identification number for a service address. This number is not required and is not assigned by the system if you leave it blank when you add a service address. If you enter this number, it must be unique.
Weather Area	A field used to distinguish different geographical areas for the purposes of entering average daily temperatures and precipitation. Customer bills can be produced with weather information that is specific to the Weather Area in which they reside.
Meter Read Cycle	A code indicating a specific cycle in which a meter is to be read in order to obtain consumption information.
Service Type	A code to indicate the type of service that is delivered to a particular meter position such as electricity, gas, water, etc.
Base Load	The amount of consumption per day that is independent of weather and other variable conditions. This is expressed in the same unit of measure as the meter readings and is used in creating estimated meter readings. For natural gas, as an example, this is the number of consumed units per day that are attributable to non-heating use.
Heat Factor	The amount of consumption per degree day that can be attributed to heat use. This is expressed in the same unit of measure as the meter readings and is used to create estimated meter readings.
Bill Factor	A multiplier used to convert consumed units into billable units. If a utility bill is solely based on consumed units, this factor would be equal to 1. For example, natural gas utilities use this factor to account for varying heat content of the gas delivered.

See Also

- *Entering Additional Meter Positions for a Service Address* for more information about adding meter positions

Processing Options for Service Address Information

```
PROCESSING DEFAULTS:

1. Enter a '1' to call Meter Positions          _____
   Entry following a successful add of a
   service address.

2. Enter a '1' to call Service Address          _____
   Category Codes following a successful
   add of a Service Address.
```

Entering Additional Meter Positions for a Service Address
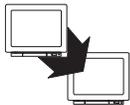
From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Service Address Search

Meter positions are locations at a service address where meters can be installed. You add meter positions to a service address when you need to track and account for the delivery of a utility. You can enter as many meter positions for a service address as you need, depending on the requirements of the service address. For example, a service address that serves a single family residence might require only one meter position, but a service address that serves a shopping mall might require multiple meter positions. For each meter position you enter, you can specify the service type, such as Gas, Electric, Water, and so on.

▶ **To enter additional meter positions for a service address**

On Service Address Search

1. Complete the steps to locate a service address.

    See *Locating a Service Address*.

2. On Service Address Information, choose the Meter Positions function.

    One of the following occurs:

    - If the service address currently has more than one meter position associated with it, the Meter Positions Inquiry form appears.

    - If the service address has no meter positions or only one meter position currently associated with it, the Meter Position form appears.

3. If Meter Positions Inquiry appears, choose the Meter Position option to display the Meter Position form.

4. If Meter Position appears, complete the following fields:

    -   Meter Position

    -   Meter Read Cycle

5. Complete the following optional field:

    -   Service Type

Field	Explanation
Mtr Pos	A slot, either physical or figurative, into which a meter may be placed in order to measure consumption of a utility service. A meter position may or may not actually contain a meter. Giving each position a separate identifier helps to clarify the physical layout of a service address that is served by multiple utility meters.

Entering Load Detail Information for a Meter Position

From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Load Detail Information

You can enter load detail information for each meter position at a service address. Load detail information is information about the appliances that are

served by a meter position. You can use load detail information to ensure that the load created by the appliances does not exceed the capacity of the meter. In addition, load detail information represents the appliances at a premise that can be included under the coverage of a service contract.

▶ **To enter load detail information for a meter position**

On Load Detail Information
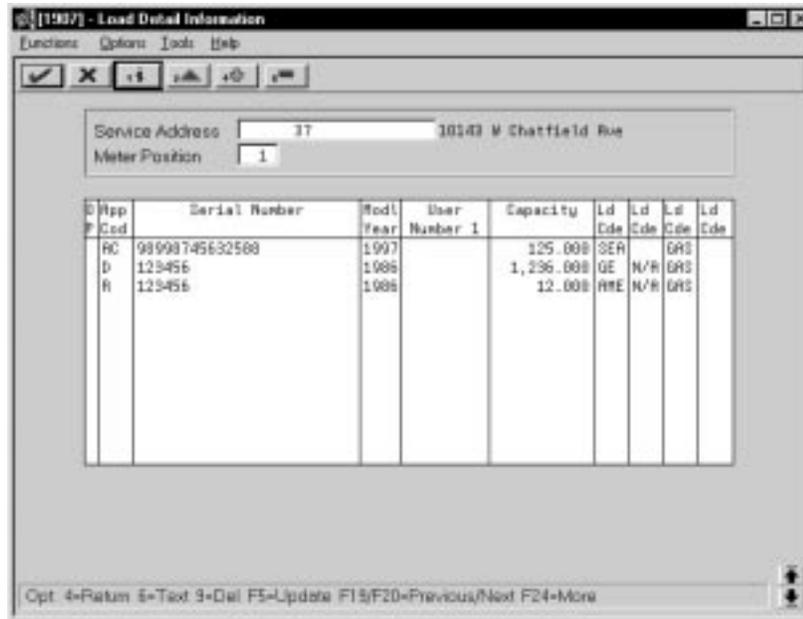
1. Complete the following fields:

    • Service Address

    • Meter Position

2. For each appliance code associated with the meter position, complete the following field:

    • Appliance Code

3. Complete the following optional fields:

    • Capacity

    • Serial Number

Field	Explanation
Meter Position	A slot, either physical or figurative, into which a meter may be placed in order to measure consumption of a utility service. A meter position may or may not actually contain a meter. Giving each position a separate identifier helps to clarify the physical layout of a service address that is served by multiple utility meters.
Appl Code	A code that designates a type of appliance, such as refrigerator, gas stove, electric furnace, and so on.
Capacity	A numeric value indicating the flow capacity of a meter.
Serial Number	The manufacturer's or supplier's serial number. . . . . *Form-specific information* . . . . The serial number must be unique for each instance of an appliance at a particular service address and meter position. If the actual serial number is not known, the first instance of an appliance can carry a blank serial number, and subsequent instances must have a non-blank, unique number assigned to them.

Revising the Sequence of a Meter Route

From Utility Customer Information System (G19), choose Service Addresses and Meters

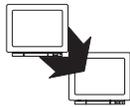From Service Addresses and Meters (G1912), choose Meter Route Sequencing

A meter route refers to the physical layout of meter positions that are grouped together for the purpose of gathering meter reading information. You can revise the sequence of a meter route to accommodate additional meter positions. You can also remove a portion of a route, appending it to the beginning or end of an existing route or creating a new route. This is particularly useful when you revise meter routes or create additional meter routes to accommodate the growth of your network.

Revising the sequence of a meter route consists of the following tasks:

- Resequencing a meter route
- Reordering multiple meter sequences
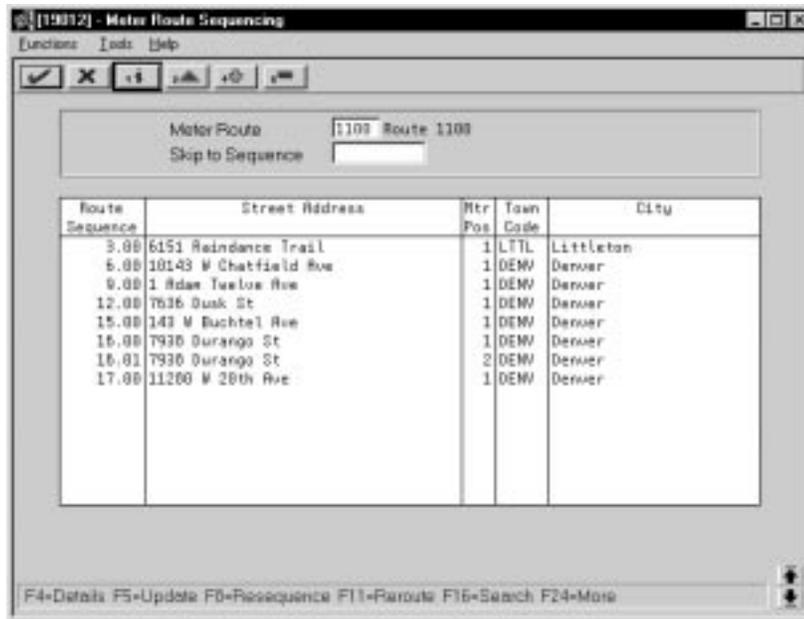
▶ To resequence a meter route

On Meter Route Sequencing

1. Complete the following field to access the sequence for a particular meter route:
   - Meter Route

2. For each meter that you want to resequence, complete the following field:
   - Route Sequence

Field	Explanation
Meter Route	A code that indicates the specific route to which a meter belongs. This is for the purpose of reading meters in a logical sequential pattern in order to obtain consumption information.

Field	Explanation
Skip to Sequence	A number that indicates the sequence in which a meter is read on a meter route.
	. . . . *Form-specific information* . . . .
	Route sequence numbers must be unique, but more than one position can carry a sequence of zero to allow for cases in which the sequence of a meter position on a route is not yet known. Route sequence numbers include decimal places to allow you to insert a meter sequence between two other sequences. For example, if you want to add a meter sequence between 2 and 3, you can enter 2.5.

What You Should Know About

Reordering the route sequence numbering	You can reorder the sequence numbering for an entire route and spread all sequence numbers uniformly by whole number. Choose the Resequence function. When you choose the resequence function, the system does not alter the sequence of the route. It only reorders the numbering. You use processing options to specify the increment by which the system orders the route sequence.
Resequencing a route during a billing cycle	To ensure system integrity, the system allows you to resequence a meter route only if the meter positions do not reside on service agreements that are currently being billed.

▶ **To reorder multiple meter sequences**

On Meter Route Sequencing

1. Complete the following field:

    • Meter Route

2. Choose the Reroute Records function.

3. On Meter Route Rerouting, complete the following fields under the Current heading:

   - From Sequence (optional)

   - Thru Sequence (optional)

4. Under the New heading, complete the following field:

   - Meter Route

5. Under the New heading, complete the following optional fields:

   - Read Cycle

   - Billing Cycle

6. Complete one of the following fields:

   - Add After Sequence

   - Add to Top

   - Add to End

7. Choose the Reroute function.

Field	Explanation
Meter Route Sequence Number – Skip To	The ending sequence number of the meter route meter positions to be rerouted.

Field	Explanation
Billing Cycle	A number indicating a specific cycle in which a service agreement is to be billed.
	. . . . *Form-specific information* . . . .
	The billing cycle for service agreements that contain rerouted meter positions can be changed when rerouting is performed only if all of the following are true:
	• The rerouted position is the only active connection on the agreement.
	• The billing cycle on the agreement is equal to the read cycle on the position record about to be rerouted.
	• The service agreement does not carry a requested bill day to dictate when it bills.
After Sequence	A value of 1 in this field will place the records from the route being moved after the sequence number specified on the new route.
Add Before	A value of 1 in this field will place the records from the route being moved at the beginning of the new route.
Add to End	Enter 1 in this field to place the records from the route being moved at the end of the new route.

Processing Options for Meter Route Sequencing

```
DEFAULT PROCESSING:

1.)  Enter amount to increment by when              _____
     resequencing.

     Notes: A. Enter whole numbers
            B. Default value is '1'
```

Meter Information

About Meter Information

You track the quantities, locations, and conditions of utility meters by creating meter master records. Each meter is represented in the system as an individual asset or piece of equipment. The system maintains a historical record of all meter positions at which a meter has resided.

In addition, all service lines, mains, and other components of your distribution network are tracked in the system as individual fixed assets. The parent and component relationship between assets allows a main to supply multiple service lines, a service line to supply multiple meters, and so on.

Complete the following tasks:

❑ Creating a meter master record

❑ Locating meter information

❑ Working with meter locations

Meter information is stored in the Fixed Asset Master table (F1201). In the context of a utility, a fixed asset might be any of the following:

- A meter
- A service line
- A service main
- A generation plant

Furthermore, in UCIS, a fixed asset might be identified by item number, unit number, or serial number, depending on which is set up as the primary number.

See Also

- *Creating an Asset Master Record* (P1201) in the *Fixed Assets Guide* for more information about fixed asset records
- *Parent and Component Relationships* in the *Fixed Assets Guide* for more information about parent and component relationships and about the identification numbers that appear in the system
- *Asset Identification* in the *Fixed Assets Guide* for more information about identification of fixed assets

- *Work Order Status Flow* in the *Equipment/Plant Maintenance* guide for more information about maintenance scheduling

- *Equipment Information Tracking* in the *Equipment/Plant Maintenance* guide for more information about repair cost analysis

Creating a Meter Master Record

From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Meter Master Information

You must create a master record for every meter in your system. When you create a master record, you establish basic information about the meter, such as:

- Item Number
- Description
- Account coding
- Category codes

Meter information is stored in the Item Master Table (F1201). The system accesses this table every time you request any type of transaction for a meter.

▶ To create a meter master record

On Meter Master Information

1. Complete the following fields:

   - Description 01
   - Company Number
   - Responsible Business Unit
   - Asset Cost Business Unit
   - Asset Cost Object
   - Asset Cost Subsidiary
   - Date Acquired

2. If you intend to track the location of the meter when it is not in service, complete the following fields:

   - Location
   - Start Date

3. Complete the following optional fields:

   - Unit Number
   - Serial Number
   - Parent Number
   - Equipment Status

4. Enter 1.00 in the following optional field:

   - Original Quantity

5. Complete the following optional maintenance field:

   - Inventory Item Number

6. Do one of the following:

   - For WorldSoftware, use the Update with Redisplay function.
   - For WorldVision, use the Add/Inquire action.

7. Choose the Category Codes function.
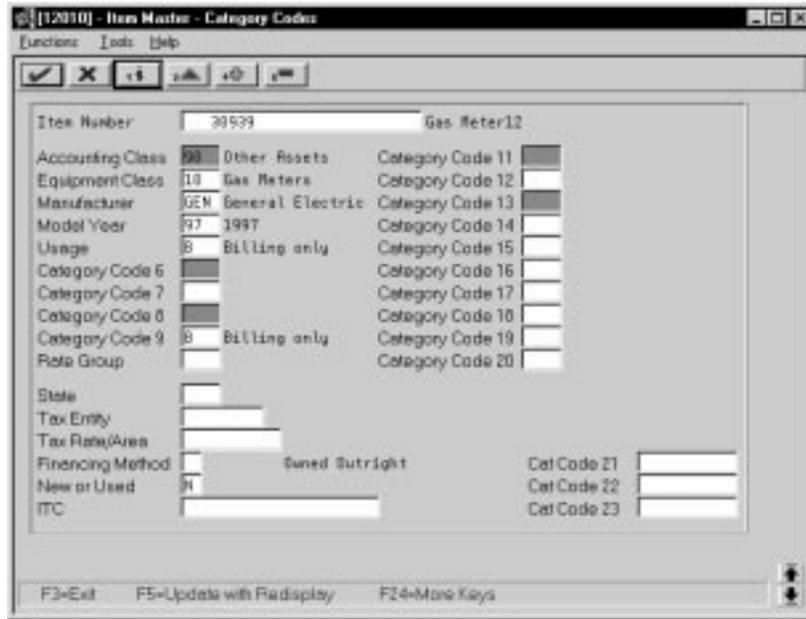
8. On Item Master – Category Codes, complete any appropriate fields, including category codes for dials and multipliers:

Some fields might contain default values.

Field	Explanation
Desc. 01	A user defined name or remark.
	. . . . *Form-specific information* . . . .
	The system displays the first line of the user defined description on all forms 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 form.
Company Number	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.
	NOTE: You can use company 00000 for default values, such as dates and automatic accounting instructions (AAIs). You cannot use it for transaction entries.
	. . . . *Form-specific information* . . . .
	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.

Field	Explanation
Responsible BU	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.
	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.
	Security for this field can prevent you from locating business units for which you have no authority.
	Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.
	. . . . *Form-specific information* . . . .
	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 form.
Asset Cst BU/Obj/Sub	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 form 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.
Asset Cost Account – Subsidiary	The subsidiary account to which the original acquisition cost and any supplemental capital additions have been charged.
Date Acquired	The date the asset was acquired. This is assumed to be the start depreciation date, but you may alter the start depreciation date. If you need to change this date, use the detail area of the Depreciation and Accounting Values form.
	If you are using the half–year convention, you must adjust the start depreciation date manually.

Field	Explanation
Location/Start Date	The current physical location of an asset. This must be a valid business unit or job number in the Business Unit Master file (F0006).
	. . . . *Form-specific information* . . . .
	If there is more than one current location for an asset, this field and the start date are blank and the location description indicates multiple current locations.
	NOTE: You can enter a location in this field only when you first create a master record. After you create the asset master record, you must use the Asset Transfer or Transfer Processing programs to make changes to the Location field.
Date	The date on which 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 it could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, and so on.
	. . . . *Form-specific information* . . . .
	The date that an asset was transferred to its current location.
	NOTE: After you create the master record, you must use the Asset Transfer or Transfer Processing programs to make changes to this field.
Unit Number	A 12-character alphanumeric code used as an alternate identification number for an asset. This number is not required, nor does the system assign a number if you leave the field blank when you add an asset. If you use this number, it must be unique. For equipment, this is typically the number stenciled on the equipment.
Serial Number	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.

Field	Explanation
Parent Number	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). 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. . . . . *Form-specific information* . . . . 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.
Equipment Status	A user defined code (12/ES) that identifies the equipment or disposal status of an asset, such as available, down, or disposed. . . . . *Form-specific information* . . . . The system updates the value in this field when you run the Asset Disposal program to dispose of the asset.
Original Qty	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.
Inventory Item No	A number that the system assigns to an item. It can be in short, long, or 3rd item number format. . . . . *Form-specific information* . . . . 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.

What You Should Know About

Meter identification numbers

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

- Item number – An 8-digit number that the system assigns to each meter master record
- Unit number – A 12-digit, alphanumeric character that the user assigns to a meter
- Serial number – A 25-digit, alphanumeric character that the meter manufacturer assigns to a meter

Different branches of your company might refer to meters in different ways. For example, accounting personnel might prefer to identify meters by an item number. Field service technicians might refer to a meter by the manufacturer's serial number or a company-assigned unit number.

See *Setting Up Fixed Asset Constants* in the *Fixed Asset* guide for more information about setting up symbols to identify each number.

Category codes

You must devote two category codes to represent the following meter attributes to the system:

- The number of dials on the meter
- A multiplier (factor of 10) to convert meter readings into true units measured

See *Setting Up System Constants for Work Management* for more information about specifying the category codes for meter attributes.

Processing Options for Meter Master Information

```
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.

 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.
```

Locating Meter Information

From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Meter Search

You can locate master information for any meter in your organization. You use search criteria to narrow your search to a particular meter or group of meters with similar characteristics. For example, you can locate master information for all meters that were supplied by a specific manufacturer. By entering additional search criteria, you can further limit the information displayed to only those meters that were supplied by the same manufacturer and for a particular model year.

You can also complete multiple tasks with a single meter. For example, after you locate a meter, you can access the master record for the meter. Other tasks you can perform from Meter Search include reviewing location information, entering a message about the meter into the message log, and revising the meter's location information.

▶ **To locate meter information**

On Meter Search

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

- Skip to Item Number
- Responsible Business Unit
- Company
- Equipment Status
- Location
- Inventory Number
- Category Codes 01 – 10

Field	Explanation
Skip to Item Number	An identification code for an asset that you can enter in one of the following formats: 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) Every asset has an item number. You can use unit number and serial number to further identify assets as needed. 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 form.
Account Class	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. J.D. Edwards 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. 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.
Eqm	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. 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.
Grp	A user defined code (12/C0) that groups similar items for billing. If you are an Equipment Management client and you use Equipment Billing, you must use this category code for rate group purposes only.

What You Should Know About

Using category codes and equipment status   If you do not want the system to limit the search by category code or equipment status, you must enter an asterisk (*) in the Category Code fields or the Equipment Status field. For example, if you enter an asterisk in the Category Code field for Manufacturer, the system searches for meters from all manufacturers that also meet the other search criteria that you specify.

Processing Options for Meter Search

```
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.

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                         _____
```

Working with Meter Locations

When meters are not in service, their locations and statuses are tracked by branch, where a branch might be a warehouse, repair center, service vehicle, or other inventory location. When meters are placed in service, their locations and statuses are tracked by service address, meter position, and active status.

You can locate all the meters at a particular service address, or you can track the location history of a particular meter. After you locate a meter, you can review other information, such as:

- Installation date

- The meter read value at the time of installation

- The status of service at a particular meter position, such as whether service is active or disconnected.

In addition, you can access the master record for either the meter or the service address without having to access additional menus.

You can record meter movement as well. For example, you can:

- Record meter relocations to and from warehouses, maintenance facilities, and other business units

- Review historical, current, and planned location tracking information

- Enter text to explain meter relocations

Working with meter locations includes the following tasks:

- ❑ Reviewing location information for a meter in service

- ❑ Entering a new location for a meter that is out of service

- ❑ Revising location information for meters not in service

Reviewing Location Information for a Meter in Service
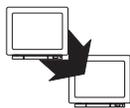
From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Meter Location Inquiry

You can review location information for all meter positions at which a meter has resided over time, or you can review information for all meters that have resided at a particular meter position over time.

▶ **To review location information for a meter in service**

On Meter Location Inquiry
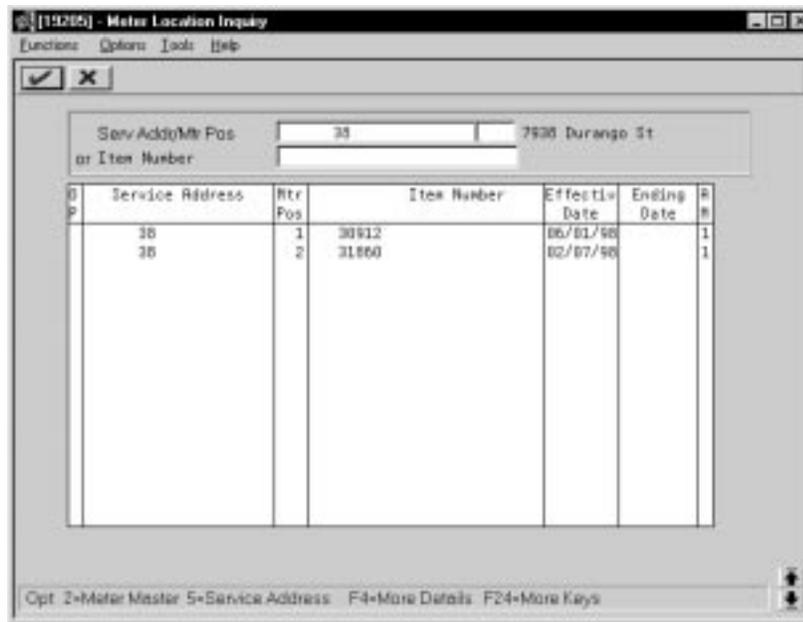
1. To review all the meters at a particular service address over time, complete the following field:

   • Service Address

2. To review only the meters associated with a particular meter position over time, complete the following field:

   • Meter Position

3. To review service address location history for a particular meter, complete the following field:

   • Item Number

   You cannot enter an item number for a meter in combination with the other fields.

Field	Explanation
Service Address	A field that allows you to enter either the Service Address number or the Parcel number. The program determines which field has been entered and verifies it accordingly.

Field	Explanation
Mtr Pos	A slot, either physical or figurative, into which a meter may be placed in order to measure consumption of a utility service. A meter position may or may not actually contain a meter. Giving each position a separate identifier helps to clarify the physical layout of a service address that is served by multiple utility meters.

Entering a New Location for a Meter That Is Out of Service for UCIS

From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Meter Search

You enter new locations for meters so you can track meter locations as you physically transfer meters from site to site, prior to placing them in service. For example, you enter a new location for a meter when you transfer a meter from a repair facility to a warehouse.

▶ **To enter a new location for a meter that is out of service**

On Meter Search

1. Locate a meter.

   See *Locating Meter Information*.

2. Choose the Meter Master option for the meter.

3. On Master Information, choose the Location Transfer function.
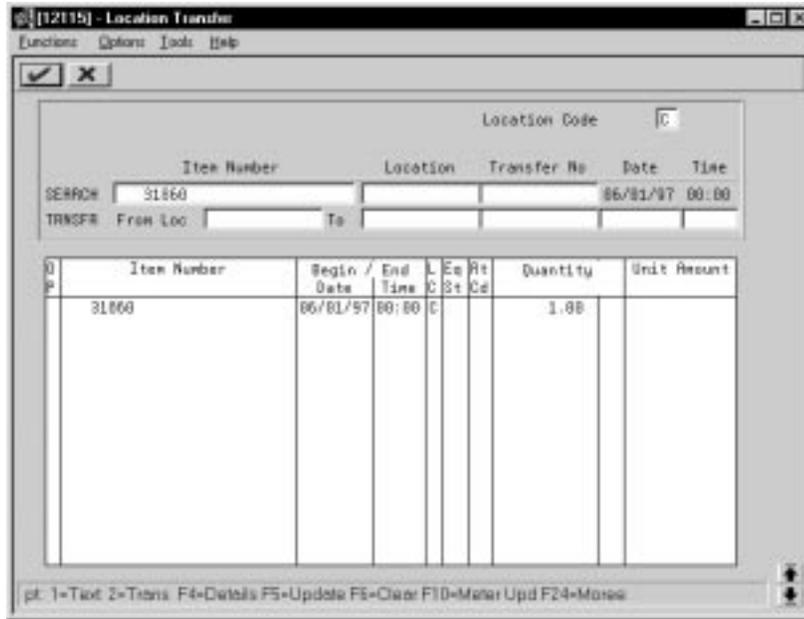
4. On Location Transfer, complete the following fields:

   - To (Location)

   - Item Number

   The Item Number field might contain a default value.

5. To complete the process, choose the Transfer option.

Revising Location Information for Meters Not in Service for UCIS
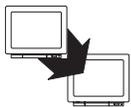
From Utility Customer Information System (G19), choose Service Addresses and Meters

From Service Addresses and Meters (G1912), choose Meter Search

You can make revisions to individual meter locations. For example, you can change the status of a meter, meter reading information, or transfer number. You can also enter text messages for any meter location. After you enter a text message for a meter location, the system alerts users to the message by highlighting the Option field next to the meter on Location Inquiry.

▶   **To revise location information for meters not in service**

On Meter Search

1. Locate a meter.

   See *Locating Meter Information*.

2. Choose the Meter Master option for the meter.

3. On Master Information, choose the Location Inquiry function.

4. On Location Inquiry, choose the Exit to Revisions option.

5. 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

6. To enter a message about the meter location, choose the Text function.

7. On Location Tracking Text, enter a message.

Field	Explanation
Ending Date	The date that the asset was removed or returned from a particular location.
Ending Time	The time that the asset was transferred from the job or will no longer be at a specified location.
Transfer Number	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.
Remark	A generic field that you use for a remark, description, name, or address.
Curr Meter Reading	The current meter reading of the piece of equipment. This field is informational only.
Orig Meter Reading	The original meter reading when the piece of equipment started at the job. This field is informational only.
Column	A code that identifies a location in a warehouse. This code is used in conjunction with a bin and lot identifier, to indicate a specific, tangible storage area within a warehouse or yard.

Processing Options for Location Revisions

```
OPTIONAL EDIT:
1. Enter a '1' to allow modifications        _____
   to future records only.  Enter a '2'
   to allow modifications to current
   records only.  Leave blank (default)
   to allow modifications to all records
   (history, current, and future).

PROPERTY TAX UPDATE:
2. Enter a '1' to update the Property        _____
   Tax fields in the Asset Master
   (F1201) when updating them on the
   Location.  Leave blank to only update
   Property Tax fields on the Location.
```

Automated Meter Reading Management

About Automated Meter Reading Management

The majority of utility meter readings will enter the system by way of an automated interface to a data collection system of some sort. Automated meter reading management features control the flow of reading information to and from such a device.

Use automated meter reading management features to:

- Download cycle-related meter reading routes to a meter reading device, such as Itron DataCap
- Download off-cycle reads such as readovers and rereads to meter reading device
- Create reports of downloaded meter route information
- Upload meter reading information from a meter reading device
- Create reports of uploaded meter reading information

Automated Meter Reading Management consists of:

❏ Downloading meter reading information

❏ Uploading meter reading information

The following diagram shows the database architecture of the meter reading upload and download processes:

Service Addresses, Meter Positions, Meter Readings

Download readings (P19832)

Upload readings (P19833)

Download to Itron (P19836)

Upload to Itron (custom)

Generic Download Table (F1932)

Generic Upload Table (F1933)

Upload from Itron (P19837)

AS/400

Itron Download Table (F1936)

Itron Upload Table (F1937)

Other Download Table (custom)

Other Upload Table (custom)

User–Performed Movement of Files

PC

Other Download Table (custom)

Other Meter Reading System

Downloading Meter Reading Information

You download meter reading information to supply meter reading devices, such as the Itron DataCap, with the information necessary to complete meter readings.

After you create download records, you can print hard copies of the meter routes for which meters are scheduled to be read.

Downloading meter reading information consists of the following tasks:

❑ Creating a scheduled download

❑ Creating a special download

❑ Creating a download from a request

❑ Printing downloaded meter routes

Creating a Scheduled Download
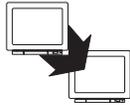
From Utility Customer Information System (G19), choose Meter Readings

From Meter Readings (G1914), choose Create Download Scheduled

You must supply each work center that is responsible for reading meters with information regarding the meter routes and individual meters that are scheduled to be read on a given date. You do so by creating a scheduled download. A scheduled download consists of the following information:

- Meter routes for each work center
- Meter positions on each meter route
- Expected high and low meter reads for each meter for tolerance checking
- Profile text entered about the customer, agreement, or service address

When you create a scheduled download, the system reads information from the Expected Read Schedule table (F1934) for a given date. The system selects all meters from all meter routes that are scheduled to be read and creates records in the Meter Readings – Download table (F1932). The system then sorts those records by work center and updates the Meter Readings – Itron Download table (F1936). These records can be downloaded to meter reading devices at each work center.

The work center responsible for performing the readings is derived from the Work Center Cross Reference table (F4872) using work group and schedule group from processing options and the town code and meter route from the particular service address. The readings for each work center are placed in separate members of the Meter Readings-Itron Download table (F1936).

When you run the Create Download – Scheduled program, the system submits the job directly to batch. J.D. Edwards recommends that you run this program as part of your unattended operations.

Processing Options for Create Download – Scheduled

```
DATE SELECTION:
1. Enter the number of days to be added          _____
   to the current date when calculating
   the selection date.
   (ie. '0' to select today's date
        '1' to select tomorrow's date)

DW VERSION SELECTION:
2. Enter the DREAM Writer version of             _____
   Download File Format to be used.
   If blank, ZJDE0001 is used.
   (see Form ID F19836)

WORK CENTER DETERMINATION:
3. Enter special read work order type            _____
   for work center determination.

4. Enter special read work order               _____
   schedule group for work center
   determination.
```
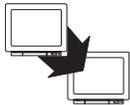
Creating a Special Download

From Utility Customer Information System (G19), choose Meter Readings

From Meter Readings (G1914), choose Create Download Special

You create a special download to schedule meters to be read other than on their normal read schedule. For example, you can create a special download to read meters that couldn't be read on their regularly scheduled date due to problems gaining access to the meters.

When you create special downloads, the system selects all meters that match the selection criteria for special reads and creates records in the Meter Readings – Download table (F1932). The system then sorts those records by work center and updates the Meter Readings – Itron Download table (F1936). These records can be downloaded to meter reading devices at each work center. Special reads can originate from the following sources:

- Special read work orders

- Meters for which the Read Next field on the Meter Position form is completed with a 1

When you run the Create Download – Special program, the system submits the job directly to batch. J.D. Edwards recommends that you run this program as part of your unattended operations.

Processing Options for Create Download – Special

```
DATE SELECTION:
1. Enter the number of days to be added          _____
   to the current date when calculating
   the selection date.
   (ie. '0' to select today's date
        '1' to select tomorrow's date)

DW VERSION SELECTION:
2. Enter the DREAM Writer version of             _____
   Download File Format to be used.
   If blank, ZJDE0002 is used.
   (see FORM ID F19836)

CYCLE/ROUTE ASSIGNMENT:
3. Enter the override meter read cycle           _____
   used for special reads.

WORK CENTER DETERMINATION:
4. Enter special read work order type            _____
   for work center determination.

5. Enter special read work order                 _____
   schedule group for work center
   determination.
```

Creating a Download from a Request

From Utility Customer Information System (G19), choose Meter Readings

From Meter Readings (G1914), choose Create Download Request

You can request meters to be read at any time by creating a download from a request. This is especially useful to reread a group of meters or an entire route due to unforeseen circumstances, such as a meter reading equipment failure.

When you create a download from a request, you use data selection from the Meter Positions table (F1905) to specify the meters that you want to schedule to be read.

When you run Create Download – Request, the system selects all meters that match the selection criteria that you specify and creates records in the Meter Readings – Download table (F1932). The system then sorts those records by work center and updates the Meter Readings – Itron Download table (F1936). These records can be downloaded to meter reading devices at each work center.

Processing Options for Create Download – Request

```
EXPECTED READ DATE:
1. Enter the date to be used as the                    _____
   expected read date for this download.

DW VERSION SELECTION:
2. Enter the DREAM Writer version of                   _____
   Download File Format to be used.
   If blank, ZJDE0003 is used.
   (see Form ID P19836)

WORK CENTER DETERMINATION:
3. Enter special read work order type                  _____
   for work center determination.

4. Enter special read work order                       _____
   schedule group for work center
   determination.
```

Printing Downloaded Meter Routes

From Utility Customer Information System (G19), choose Meter Readings

From Meter Readings (G1914), choose Print Meter Routes

You can create customized reports of all meter reading data that the system downloads to meter reading devices. You can then produce hard copy backups of the meter routes that meter reading personnel can use. This is especially useful if a meter reading device fails in the field.

```
                                   Print Meter Routes                        Page    –      1
                                      Route 1100                             Date    – 10/17/98

Meter    Route    Active  Street
Route   Sequence  Meter   Number  Pre     Street Name            Type  Suf  Meter    Town
                                                                           Number   Code
-----  ---------  ------  ------  ---  ----------------------  ------  ---  -------  -----
1100      4.00      1     514          May                     St          514961   DENV
          5.00      1     9623         Third                   Lane         96238   ENG
          6.00      0     322          Third                   Lane                 ENG
          8.00      1     81           Third                   Lane        963188   ENG
         10.00      0     112          Riviera                 Drive                CLC
         12.00      0     112          Riviera                 Drive                CLC
         14.00      0     112          Riviera                 Drive                CLC
         16.00      1     111          Riviera                 Drive        20693   CLC
         18.00      1     113          Riviera                 Drive        20706   BROOM
         20.00      1     21           Third                   Lane        963111   ENG
         22.00      1     21           Third                   Lane         96311   ENG
         24.00      1     10           Third                   Lane         96310   ENG
         26.00      1     924          Mountain View           Dr            1129   CROCK
         28.00      1     924          Mountain View           Dr            1023   CROCK
         30.00      0     924          Mountain View           Dr                   CROCK
         32.00      1     924          Mountain View           Dr             707   CROCK
         34.00      1     924          Mountain View           Dr             905   CROCK
         36.00      1     924          Mountain View           Dr             906   CROCK
         37.00      1     924          Mountain View           Dr             916   CROCK
         38.00      1     924          Mountain View           Dr             910   CROCK
         40.00      1     924          Mountain View           Dr             911   CROCK
         42.00      0     93000   N    Prospect                Ave                  CAP
         44.00      1     325          Third                   Lane         96325   ENG
         46.00      1     2700         First                   Ave           2700   ENG
         48.00      1     2700         First                   Ave          27001   ENG
         50.00      1     2700         First                   Ave          27002   ENG
         52.00      1     2700         First                   Ave          27003   ENG
         54.00      1     328          Third                   Lane           968   ENG
         56.00      1     328          Third                   Lane           969   ENG
         58.00      1     480          Aurora                  Place         2878   BRICK
         60.00      1     115          Riviera                 Drive        20722   CLC
         62.00      1     324          Third                   Lane         96324   ENG
         64.00      1     39           Thirteenth              Ave          96008   ENG
         66.00      1     39           Thirteenth              Ave          96009   ENG
         68.00      1     39           Thirteenth              Ave          96010   ENG
         70.00      1     39           Thirteenth              Ave          96011   ENG
         72.00      1     39           Thirteenth              Ave          96012   ENG
         74.00      1     39           Thirteenth              Ave          96013   ENG
         76.00      1     924          Mountain View           Dr           96014   CROCK
         78.00      0     39           Thirteenth              Ave                  ENG
         80.00      0     924          Mountain View           Dr                   ENG
         82.00      1     924          Mountain View           Dr           96017   ENG
         84.00      1     6330         Brompton                Rd           96018   CROCK
         86.00      1     924          Mountain View           Dr           96030   ENG
         88.00      1     924          Mountain View           Dr           96031   CROCK
         90.00      0     3154         Dawson                  Cir                  CROCK
         92.00      0     621          Johnson                 Ct                   CROCK
         94.00      1     110          Riviera                 Drive        20677   CLC
         96.00      1     924          Mountain View           Dr           96020   ENG
         98.00      1     20           Third                   Lane         96320   ENG
        100.00      1     326          Third                   Lane         96326   ENG
        102.00      1     326          Third                   Lane          3261   ENG
        104.00      1     326          Third                   Lane          3262   ENG
        106.00      1     326          Third                   Lane          3263   ENG
        108.00      1     326          Third                   Lane          3264   ENG
```

Uploading Meter Reading Information

After you gather meter reading data from the field, you must upload the data from a meter reading device and update the Meter Readings table (F1930).

Uploading readings from a meter reading device consists of the following tasks:

❑ Uploading meter readings

❑ Reviewing unposted meter readings

❑ Printing a report of uploaded meter routes

Uploading Meter Readings
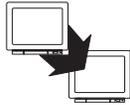
From Utility Customer Information System (G19), choose Meter Readings

From Meter Readings (G1914), choose Upload Readings from Itron

You upload meter readings to transfer data gathered from meter reading devices to your system. When you upload readings, the system reads information from the meter reading devices, converts the data into a system-compatible format, and attempts to post the meter readings to the Meter Readings table (F1930). In addition, if there are any special read work orders associated with the meter reading data being uploaded, the system updates those work orders.

When you select Upload Readings from Itron, the system submits the job directly to batch. J.D. Edwards recommends that you run this program at the end of each business day, but before you create any meter downloads for the following day.

What You Should Know About

Meter readings that do not successfully post

When the system reads data from Itron meter reading devices, it creates records in the Generic Upload table (F1933). If the meter readings post successfully to the Meter Readings table (F1930), the system purges the records from the Generic Upload table. When a meter reading does not post successfully, the system does not purge the record until the problem is resolved.

Posting meter readings from special read work orders

When the system posts a meter reading that resulted from a special read work order, it does not purge the record created in the Generic Upload table (F1933). The system retains the information for tracking and reporting purposes. You can use the P00PURGE program to purge the information periodically.

Consumption canceled by a posted reading

When the system posts a meter reading that triggers canceling of consumption, the system automatically cancels back through a user-specified maximum number of estimated readings. If the system finds an actual reading that needs to be canceled or if more than the maximum number of estimates need to be canceled, the system flags the uploaded reading as an error.

Reviewing Unposted Meter Readings
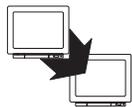
From Utility Customer Information System (G19), choose Meter Readings

From Meter Readings (G1914), choose Review Unposted Readings

After you run a meter reading upload, you can review the reasons for any meter readings that did not successfully post to the Meter Readings table (F1930).

▶ **To review unposted meter readings**

On Review Unposted Readings
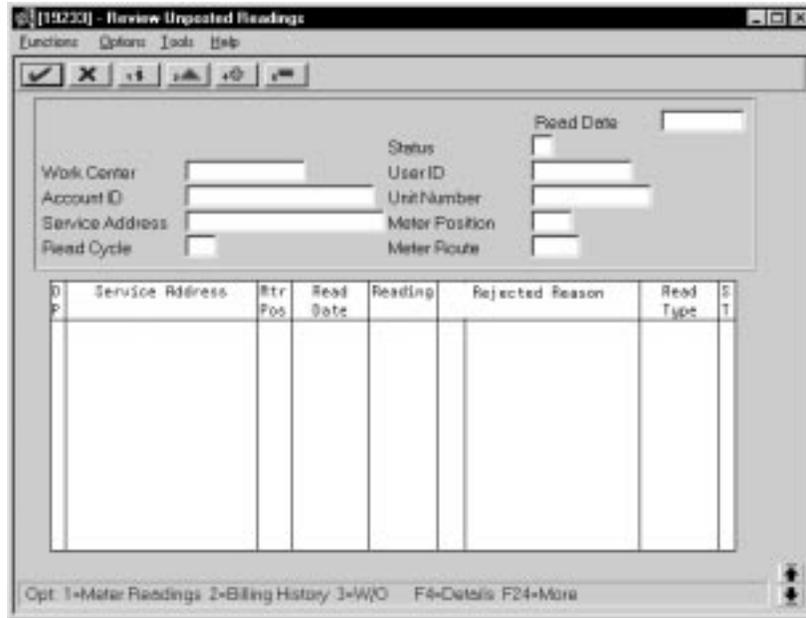
To limit the amount of information that appears, complete any combination of the following fields:

- Read Date
- Work Center
- Status
- User ID
- Item Number
- Service Address
- Meter Position
- Read Cycle
- Meter Route

Printing a Report of Uploaded Meter Routes
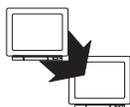
From Utility Customer Information System (G19), choose Meter Readings

From Meter Readings (G1914), choose Print Uploaded Readings

You can create customized reports on all meter data that is uploaded from meter reading devices.

```
                              Print Uploaded Routes                    Page    -       1
                                                                       Date    - 10/17/98
Meter   Route    Street                          Meter    Read    Read    Meter   Unread Reader               Work
Route  Sequence  Number Pre    Street Name    Type  Suf  Number   Date    Time  Reading Reason   ID   Work Center  Order #
-----  --------- ------ --- -------------------- ----- --- -------- -------- ------- ------- ------ -------- ------------ --------
3914     999.99  3556     Madison              Ct        32281 04/30/96           4303  R                   81101
         9,090.00 3562    Madison              Ct        32344 05/01/96           4510  R                   81101
```

Work Order Creation

About Work Order Creation

You create work orders to initiate, track, and report on work performed by service personnel. For example, you create work orders for:

- Installing, exchanging, or repairing meters
- Repairing appliances at a service address
- Responding to reports of leaks or outages
- Establishing a new service by installing a new service line
- Installing a new service main into your delivery network

By creating a work order, you also communicate important information about a task or project to others who are involved.

Work order creation consists of the following tasks:

❑ Understanding the work order status flow

❑ Creating work orders

You must create a master record for every work order that you want to track in the Work Orders system. The master record consists of basic information that defines the work order, such as the task name and appliance code (known jointly as the investigation code). You can also enter additional descriptive information to further identify the work order, such as special instructions, priority, building access instructions, and so on.

Creating a work order can be a simple or complex procedure, depending on several factors, such as:

- The nature of the work to be performed, such as a simple appliance repair or the installation of new delivery lines
- The urgency of the work to be performed, such as responding to an emergency leak
- The availability of labor resources needed to perform the work
- Whether the work will result in a charge to the customer

You can create new work orders by entering all of the necessary information for those tasks that are unique. You can also create work orders by copying the

information from model work orders for those tasks that are similar to other tasks you perform.

Understanding the Work Order Status Flow

The cycle of a work order consists of the statuses (steps) through which a work order must pass.

Before you use the work order features in UCIS, you must be familiar with the following terms and concepts that are associated with the work order cycle:

- Investigation codes
- Work order statuses
- Work order activity rules
- Edit rules
- Behaviors
- Priority work orders

Investigation Codes

Investigation codes determine default information about work orders. An investigation code is defined by a unique combination of task name and appliance code. For example, one investigation code might be for the combination of task name 129 (appliance repair) and appliance code D (dryer). For each investigation code, you can assign default values for the following Work Order Entry fields:

- Order Type
- Work Group
- Schedule Group
- Labor and material billing items

When you create a work order, the investigation code you enter determines the default values that the system enters in these fields.

In addition, you can assign a model work order to an investigation code. The system uses the model work order as a template when creating orders.

Work Order Statuses

Work order statuses are user defined and can represent any stage in the flow of work that your organization requires. For example, a work order can include statuses that indicate:

- Work order entered
- Work order scheduled
- Work order en route
- Work order on site
- Work complete
- Work order closed

Work Order Activity Rules

You set up work order activity rules to manage work order. You set up as many versions of activity rules as you need and distinguish the versions based on work order document type and work group. For example, you can set up different activity rules for emergency shut-off orders and routine appliance inspection orders.

For each status, you specify a next status and other allowed statuses. For example, after you enter a work order, you can specify the next status, such as work order accepted. You can also specify another allowed status, such as work order canceled. The system prevents users from entering any status unless it is a next status or other allowed status.

Edit Rules

You can specify that certain information must exist before a work order can proceed to the next status. You do this by attaching edit rules to statuses. As with work order activity rules, you can set up as many edit rules as you need. Edit rules are associated with work orders based on:

- Work order document type
- Work group
- Work order status

For example, for a meter turn-on order, you can specify that before the order can progress from the initial status of Entered to Scheduled, a meter must exist at the service address and meter position on the order and that meter must currently be turned off.

For each edit rule that you set up, you can specify that a warning appears indicating that a certain condition has not been met, but allowing the user to

continue. Alternatively, you can require the user to enter the additional information before changing the work order's status.

Behaviors

You can specify that the system perform certain operations that are related to the work order, depending on the work order's status. You do so by attaching behaviors to statuses. As with edit rules, you can set up as many behaviors as you need. The system performs behaviors based on the following characteristics:

- Work order document type
- Work group
- Work order status

For example, for a meter turn-on order, you can specify that when the work order reaches the status of work complete, the system performs the following operations:

- Run the meter readings maintenance program (to allow for the entry of the turn-on reading)
- Update the work order completion date

Priority Work Orders

Certain emergency conditions within a utility environment require immediate attention and action. These conditions include:

- Gas leaks
- Downed power lines
- Damaged water mains

When you create a work order to resolve an emergency, you can identify the work order as a priority work order and attach monitoring rules that determine how the work order is handled. Monitoring rules ensure that the system alerts users when action isn't taken to resolve the emergency within time constraints that you specify.

When a priority work order doesn't reach specified statuses within the time constraints that you specify, the system sends a break message to a specified user. If that user is not signed on, the system sends a break message to all users that are signed on to the system under the group profile you specify. A break message appears on a user's monitor, regardless of the program that the user is currently using. Depending on how you set up work order monitoring rules, the system monitors the work order status and sends periodic break messages to responsible personnel until its status changes. Break messages include the following information:

- Investigation code description

- Street address and town code description

- Work order number, entry date, and entry time

- Description of status not achieved

- Dispatch group name

- Division (Branch) name

What Happens When You Create a Work Order?

When you create a work order, the system checks processing options to determine the initial status of the order. If you complete the required information for the order, the system accepts the order and begins the status flow for the order.

All work orders require an investigation code. The system derives the investigation code from the combination of task name and appliance codes that you enter. Depending on the investigation code, the system enters default values in several fields on Work Order Entry and Additional Order Information, including:

- Order Type

- Work Group

- Schedule Group

- Bill Item fields, such as Regular Labor

If you specify that the work order is a priority work order, the system verifies that the work order type from the investigation code matches the work order type you specify for priority work orders in the processing options. If the system does not find a match, an error message appearsit displays . This feature prevents you from entering non-priority work orders while Work Order Entry is in priority mode.

What Happens When You Schedule a Work Order?

A processing option specifies the initial status of a new work order. This might be a status that requires a schedule date in the order activity rules. If so, the system schedules the order based on the customer's requested time frame and on resource availability.

Scheduling

You can review open time slots for the primary work center. If the primary work center has no available time slots, you can review other work centers and time

slots that are not already filled. This feature provides scheduling flexibility and a greater likelihood that you can meet the customer's requested schedule.

Priority Work Orders

Depending on the work order monitoring rules that you have in effect, the system can send messages to specified users based on elapsed time measurements.

What Happens When You Change the Status of a Work Order?

When you change the status of a work order, the system verifies that the next status is valid. If so, the system checks for any information that would trigger an edit rule violation. The system then performs any behaviors that are applicable at the new status.

The following flow chart illustrates the process of changing the status of a work order:

The system verifies that
the next status is valid for the
work order type, work group, and
from status

↓

Is the next
status valid? —— *No* ——→ The system displays
an invalid status error

↓ *Yes*

The system displays the
Status Change Window

↓

Was data entered
on the Status
Change Window? —— *No* ——→ The system returns to
the work order without
accepting the change
in status

↓ *Yes*

The system
performs edits

↓

Were there any
hard edit
rule failures? —— *No* ——→ The system
performs behaviors

↓ *Yes*

The system displays
the edit rules and
behavior fail inquiry

Did any
behaviors
fail? —— *No* ——→ The system performs all other
actions mandated by the work
order activity rules

↓ *Yes*

The system displays the
edit rules and behavior
fail inquiry

Example: Edit Rules and Behaviors for a Meter Turn On Order

The following table represents a typical order to turn on a meter. It shows edit rules and behaviors for each status change. You can use a processing option to specify the status for a new work order. In the table, Accepted is the status for a new work order.

Status – work order accepted	Edit rules: • Must have an item number at the position • Must have a meter install date • Must have active meter field of 0 • Must have a service address • Must have a service agreement
Status – work order scheduled	Edit rules: • Must have a schedule date for the work order Behaviors: • Print the work order
Status – work order enroute	No edit rules or behaviors
Status – work order on site	No edit rules or behaviors
Status – work complete	Behaviors: • Change the active meter flag for the meter position • Run meter readings maintenance program • Update the order complete date
Status – work order closed	Edit rules: • Must have an item number at the position • Must have a meter install date • Must have a service address Behaviors: • Complete activation transfer • Activate service agreement

Status – work order final complete

Edit rules:

- Must have an active meter field of 1
- Must have a meter reading source of 7 (turn-on)
- Must have an active service agreement

Behaviors:

- Write special charges
- Write violations to customer profile

Status – work order canceled

Edit rules:

- Check for open purchase orders

Behaviors:

- Cancel activation transfer
- Update order complete date

See Also

- *Appendix A – Edit Rules by Order Type and Status*
- *Appendix B – Edit Rule and Behavior Tables*

Creating Work Orders

You create work orders to request work. You use information from work orders to track and report on the progress of work. You can create work orders to request any type of work throughout UCIS. For example, you create work orders for:

- Installing, exchanging, or repairing meters
- Repairing appliances at a service address
- Responding to reports of leaks or outages
- Establishing a new service by installing a new service line
- Installing a new service main into your delivery network

By creating a work order, you also communicate important information about a task or project to others who are involved.

Creating work orders includes the following tasks:

❏ Creating a basic non-customer work order

❏ Creating a priority work order

❏ Creating a customer work order

Creating a Non-Customer Work Order for UCIS

You create non-customer work orders when you request work for which you do not need information from the customer service agreement, or for which such information is not available. For example, you create non-customer work orders when you need to request non-premise work, such as investigating a leak at the location of two cross streets.

Creating a non-customer work order includes the following tasks:

❏ Entering basic work order information

❏ Entering descriptive information for a work order

❏ Adding supplemental data to a work order

Entering Basic Work Order Information
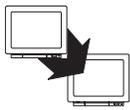
From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Entry

Depending on your organization and the task to be performed, you can create work orders that include only the most basic information, such as the task name, appliance code, and town. Or you can include optional information, such as service address information, scheduling dates, times, and so on.

The system completes the work order with default values based on the model work order associated with the investigation code. The investigation code is defined by the combination of task name and appliance code.

See Also

- *Understanding the Work Order Status Flow* for more information about investigation codes

▶   **To enter basic work order information**

On Work Order Entry

1. Choose the Investigation Code Inquiry function to complete the following fields:

    - Task Name
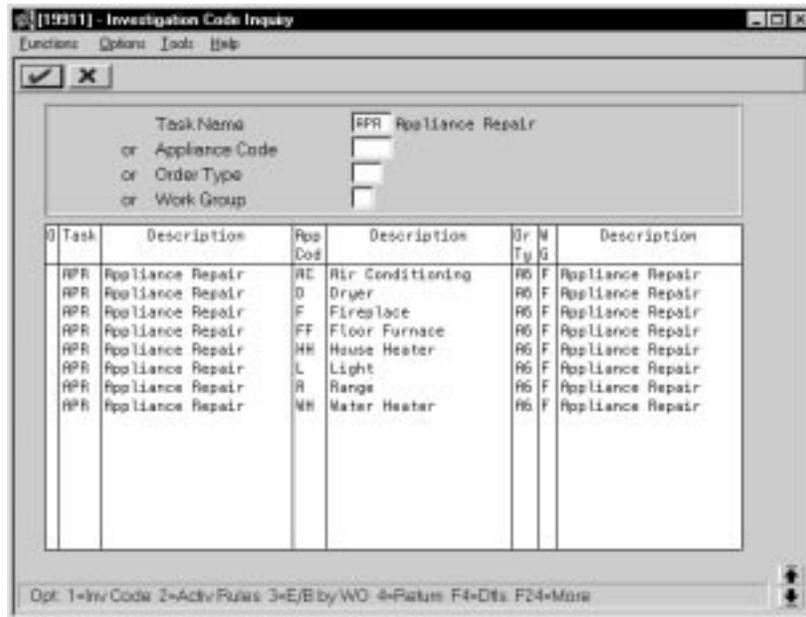
- Appliance Code

2. On Investigation Code Inquiry, choose Return for the combination of task and appliance code you want.

3. On Work Order Entry, complete the following field:

    - Town

4. Complete the following optional fields:

    - Customer

    - Service Address

    - Requested Date

    - Time

5. Complete the following optional fields of the street address:

    - Street Number

    - Direction Prefix

    - Street Name

    - Street Type

6. Choose the Update and Redisplay function.

7. Choose the Additional Order Information function to view additional optional fields.

Field	Explanation
Task Name	A user defined code (19/TN) that defines the actions that represent the nature of the work being performed, such as meter set, appliance repair, and so on.
Appliance Code	A code that designates a type of appliance, such as refrigerator, gas stove, electric furnace, and so on.
Town Code	A user defined code (19/TC) that identifies the town or city in which a service address is located. This code is used to expedite searches for service addresses, and it plays a role in determining the work center when you are scheduling work order for a service address.
Customer	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, special mailing addresses, and so on.
Service Address	A unique numeric identifier for a physical location at which utility service is delivered. A service address often corresponds to a parcel of land, a unit in an apartment building, and so on. This identifier is assigned by the system through Next Numbers if you do not provide it when you add a new service address.
Requested Date	This is the date that the customer requested the work to be completed. This date is used by the scheduling program to match available work centers to work orders.
Time	This is the original time that the customer requested the service to be performed.

Field	Explanation
Street Number	Identifies the sequential location portion of a street address.
Direction Prefix	Identifies a directional prefix for a street address such as North, South, East, West, Northwest, and so on.
Street Name	Identifies the name portion of a street address.
Street Type	A five–character alphanumeric field used to identify the type portion of a street address such as Avenue, Street, Road, Drive, and so on.

What You Should Know About

Revising work order information	After you create a work order that has no edit rules or behavior failures, you cannot change the task name or appliance code. Other edit rules and activity rules might be in effect that might limit the amount of information that you can revise at different status levels.
	See *Changing the Status of a Work Order* for more information on revising work order status.
	See *Understanding the Work Order Status Flow* for more information about edit rules and behavior rules.

See Also

- *Setting Up Investigation Codes (P1991)*

Processing Options for Work Order Entry

```
PROCESSING DEFAULTS:
 1. Enter Status for a successfully               _____
    entered work order.

 2. Enter Status for failed Work Order            _____
    (due to edit rule or behavior).

 3. Enter version of Edit Rule Program            _____
    to execute(X4891).
    (Blanks default to ZJDE0001)

 4. Enter version of Supplemental Data            _____
    Program to execute(P480901).

 5. Enter '1' to default the Manager              _____
    based on Category Codes 1,2,3 .

 6. Enter '1' to automatically change             _____
    the request date of the parts and
    routings when they change on the
```

work order.

7. Enter Order Type for Priority Orders   _____

8. Enter Record Type to use to load the
Record Type Text Line.   _____

9. Enter the Record Type to use to
write the work order description to
the F4802.   _____

10. Enter the Approval Type to be used
in the approval process.   _____

11. Enter the Customer Profile Data Type
to retrieve access information
default.   _____

12. If a dispatching system is being
used, enter the program to call.   _____

13. Enter the Dream Writer Version of
Work Order Print to use.   _____

ENTER THE FOLLOWING INVESTIGATION CODES:
New Customer Turn On:
  Task Code   _____
  Appliance Code   _____

New Customer Turn On Set:
  Task Code   _____
  Appliance Code   _____

New Customer Readover Due to Turn Off:
  Task Code   _____
  Appliance Code   _____

New Customer Readover Due to Cut Off:
  Task Code   _____
  Appliance Code   _____

New Customer Readover
  Task Code   _____
  Appliance Code   _____

Reconnect Cut for Non-Payment
  Task Code   _____
  Appliance Code   _____

Reconnect Cut for Non-Payment – Set
  Task Code   _____
  Appliance Code   _____

Reconnect – Locked for Non-Payment
  Task Code   _____
  Appliance Code   _____

Turn On
  Task Code   _____
  Appliance Code   _____

Turn On – Set
  Task Code   _____
  Appliance Code   _____

```
Existing Customer Readover:
   Task Code
   Appliance Code
```
                                         _____
                                         _____

What You Should Know about Processing Options

Record Types (8)   Use this option to specify a work order record type that the system displays directly on the work order.

Entering Descriptive Information for a Work Order
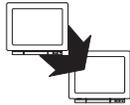
From Utility Customer Information System (G19), choose Work Orders

From Service Orders (G1913), 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 can include an extended description of the task in the record type A, key and access information in record type B, parts and tools that are needed in record type C, and so on.

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

- Description only
- Description with three columns

▶ To enter descriptive information for a work order

On Work Order Entry

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

3. On Record Type Review, choose the Select and Review option for each record type to which you want to add text.

   Record types for which the option field is highlighted contain text.
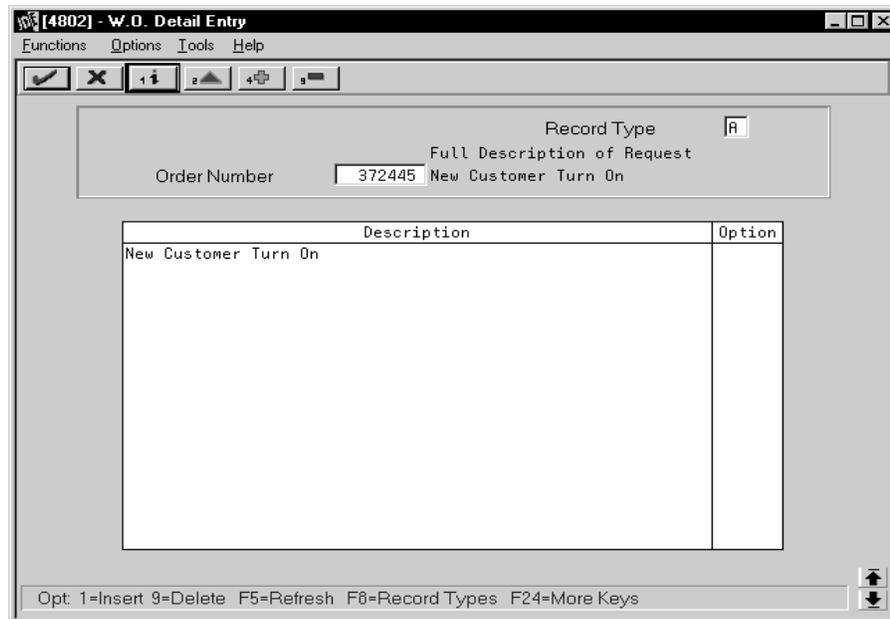
4. On Work Order Detail Entry, enter descriptive information for the record type.

5. Repeat steps 3 and 4 for each record type that you want to add to the work order.

Field	Explanation
Order Number	The number that identifies an original document. This can be a work order, a voucher, an invoice, unapplied cash, a journal entry number, and so on.

See Also

- *Setting Up Work Order Record Types (P48002)*

Processing Options for Work Order Detail Entry

Enter the record type required: _____

Adding Supplemental Data to a Work Order
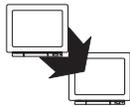
From Utility Customer Information System (G19), choose Work Orders

From Service Orders (G1913), choose Work Order Entry

You can enter additional user defined information on a work order. Use this data to assist in tracking and reporting on work orders. For example, you might set up a supplemental data type associated with leak information and enter the appropriate information on each work order for which leak information is relevant.

Supplemental data is similar to record types, but with more individual field editing options.

▶ To add supplemental data to a work order

On Work Order Entry

1. To locate a work order, complete the following field:

    - Order Number

2. Choose the Supplemental Data function.
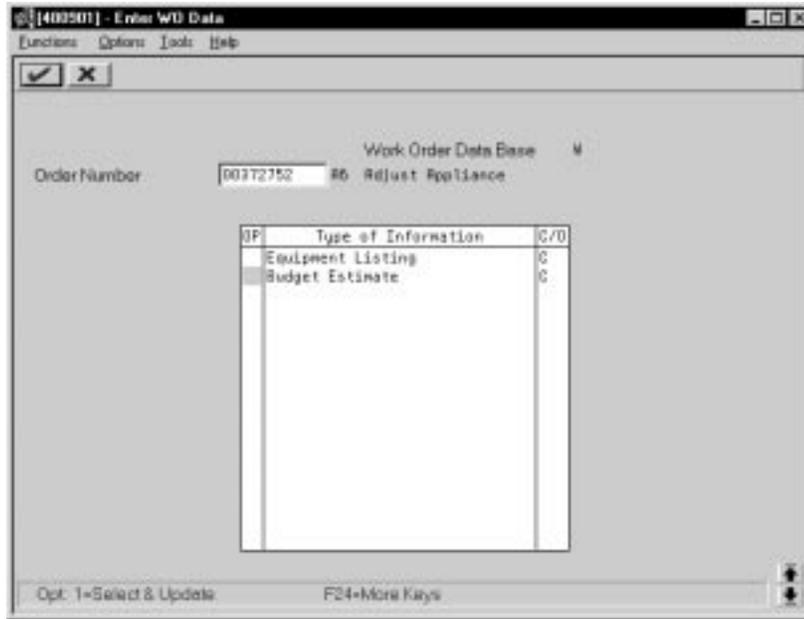
3. On Enter Work Order Data, choose the Select and Update option for each type of information that you want to enter.
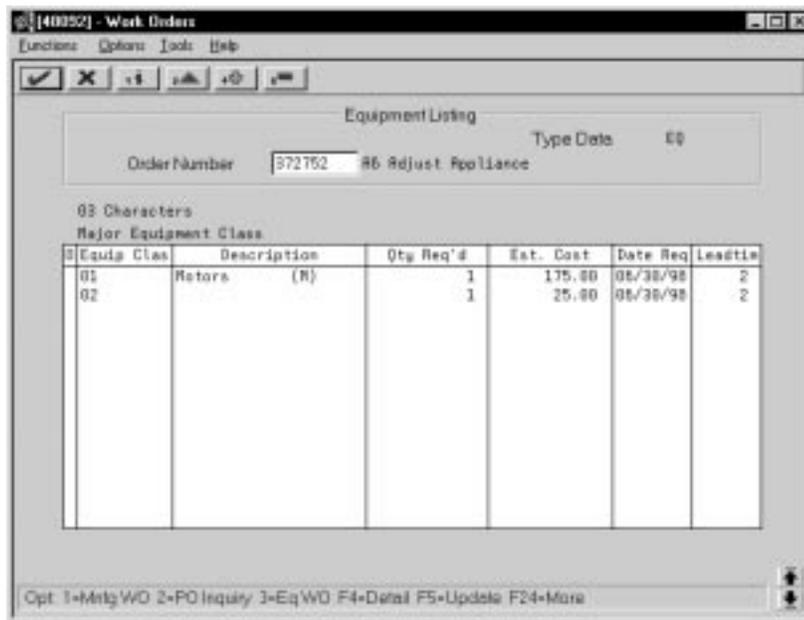
4. On Work Order, complete the appropriate fields:

5. Access the detail area.
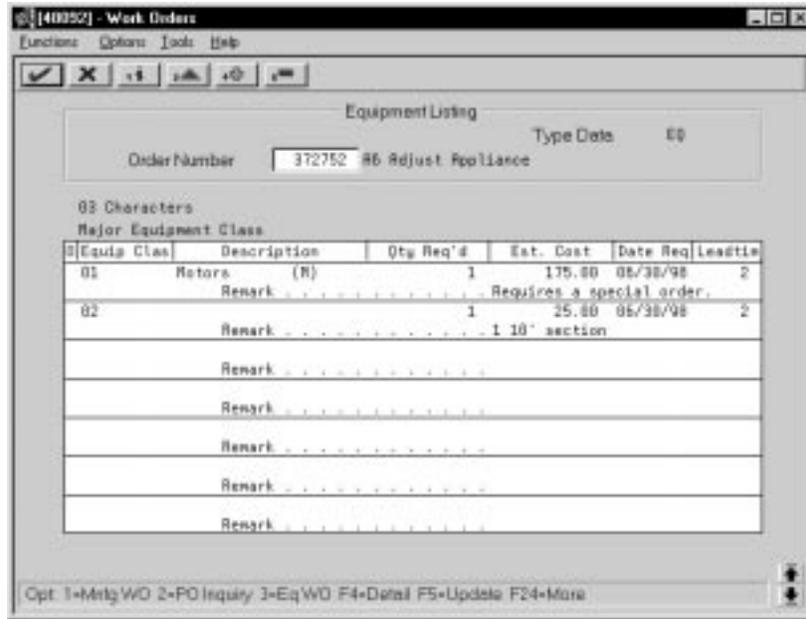
6. Complete the appropriate fields.

Processing Options for Enter Work Order Data

```
DISPLAY OPTION:
1. Enter the Work Order Data Base.  Only          _____
   Data Types with this Data Base will
   be displayed on the screen.  Leave
   blank to display Data Base "E"
   (Engineering Change Orders).
```

Processing Options for Work Order

```
SELECTION CRITERIA:
1. Enter the Supplemental Data Base code           _____
   for the type to be reviewed:
      E = Engineering Change Orders

2. Enter the specific Type of Data on              _____
   which to inquire.
```

Creating a Priority Work Order for UCIS

From Utility Customer Information System (G19), choose Work Orders

From Service Orders (G1913), choose Work Order Entry

You create priority work orders to respond to emergency situations such as leaks, downed lines, damaged mains, and so on.

▶   **To create a priority work order**

On Work Order Entry

1. Choose the Priority function.

   The description Priority Order appears at the top of the form.

2. Choose the Investigation Code Inquiry function to complete the following fields:
   - Task Name
   - Appliance Code

3. On Investigation Code Inquiry, choose Return for the combination of task and appliance code you want.

4. Complete the following fields:
   - Service Address
   - Town

Creating a Customer Work Order
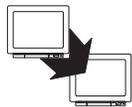
From Utility Customer Information System (G19), choose Customers and Accounts

From Customers and Accounts (G1911), choose CIS Workbench

You can create work orders directly from CIS snapshot. When you create work orders in this manner, the system supplies default values for many fields, based on information from CIS snapshot.

▶   **To create a customer work order**

On CIS Workbench
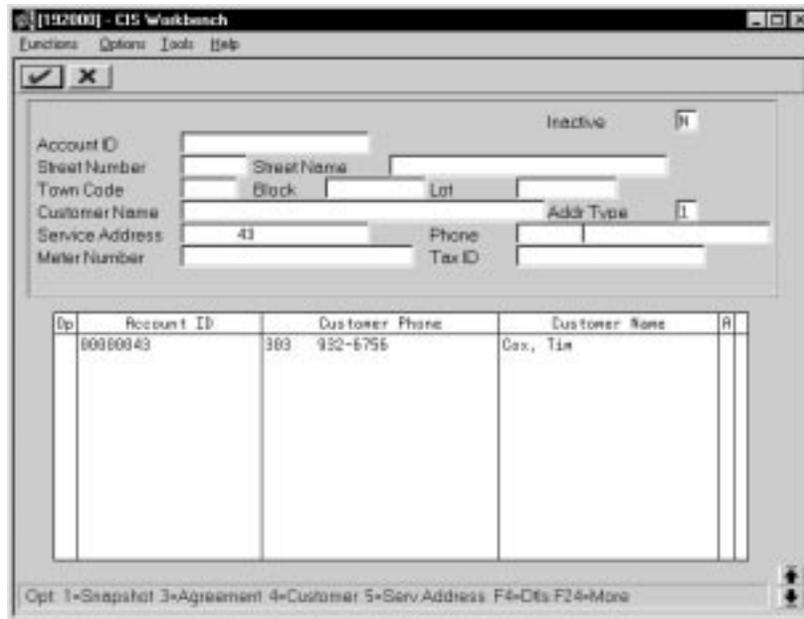
1. Locate the service agreement by completing one or a combination of the following fields:

   - Account ID
   - Street Number
   - Street Name
   - Town Code
   - Block
   - Lot
   - Customer
   - Address Type
   - Service Address
   - Phone Prefix
   - Phone Number
   - Meter Number
   - Tax ID

2. If a list of agreements appears on CIS Workbench, choose the Snapshot option for the agreement that you want.
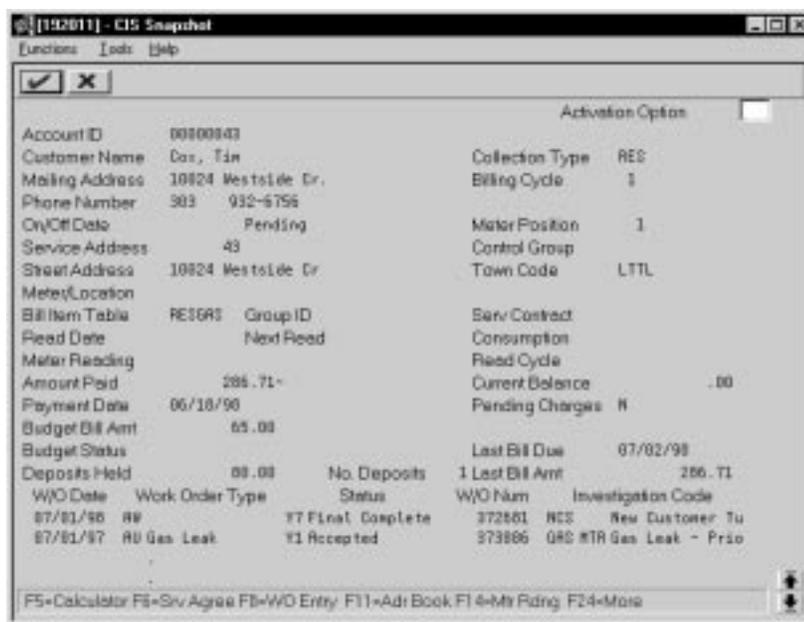
3. On CIS Snapshot, choose the Work Order Entry function.

4. On Work Order Entry, choose the Investigation Code Inquiry function to complete the following fields:

  • Task Name

  • Appliance Code

5. On Investigation Code Inquiry, choose Return for the combination of task and appliance code you want.

6. Complete the following optional fields:

  • Requested Date

  • Requested Time

Field	Explanation
Account ID	A free-form field that contains the account of a utility customer as the customer is intended to see it. This field must contain a unique value on each Service Agreement on which it is used.
	. . . . *Form-specific information* . . . .
	You can enter a partial account ID to display all service agreements containing the characters you enter. For example, you might enter MK90 to display MK90001 through MK90009.
Street Name	Identifies the name portion of a street address.

Field	Explanation
Block	A field used in location reporting. The block is used in conjunction with the lot and unit to describe a parcel of land, usually within a subdivision.
Lot	A field used in location reporting. The lot is used in conjunction with the block and unit to describe a parcel of land, usually within a subdivision.
Customer Name	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name. *. . . . . Form-specific information . . . .* A name associated with a service agreement. Depending on the Address Type field, this may refer to the customer's name, the bill to address name, the third party address name, or the memo bill address name.
Customer Address Type (1/2/3/4)	A flag that specifies which address book number is being searched upon by name. Valid values are the following: 1 Customer Number 2 Memo Bill Address 3 Bill to Address 4 Third Party Address
Service Address	A field that allows you to enter either the Service Address number or the Parcel number. The program determines which field has been entered and verifies it accordingly.
Phone Prefix	The prefix (in the US, the area code) for the phone number. The required format for US area codes is three characters in parentheses, for example (303). If you require an alternate format to accommodate non-US area codes, you must change the data display rules in the data dictionary.
Phone Number	The free-form telephone number. You can use any applicable telephone number format. For example, the format in Laramie, Wyoming might be 321-5223; in Singapore 011-65-469-8382. When you search for an address using the phone number, you must enter the number exactly as it was set up in the Address Book system. If all phone numbers follow a consistent format, you can specify that format in the data dictionary. For example: ___-____.

Field	Explanation
Tax ID	The identification code required by various tax authorities. This can be a social security number, federal or state corporate tax ID, sales tax number, and so on. Do not enter separator characters. The system verifies the number and prints the separators in their correct format, according to the value of TAXC (Person/Corporation Code). If there is no value for TAXC, the system does not format this number.
	When you add new line items to a supplier's worktable record, the supplier master record supplies the default value for the tax ID.
	. . . . *Form-specific information* . . . .
	The tax ID of the customer on a service agreement.

What You Should Know About

Valid search field combinations

Some search fields on CIS Workbench must be used in combination with other search fields. The following address-related combinations are valid:

- Street Name and Town Code
- Street Number and Street Name
- Street Number, Street Name, and Town Code
- Town Code and Block
- Town Code, Block, and Lot

Processing Options for CIS Workbench

```
DISPLAY DEFAULTS
1. Select the field to appear initially            _____
   in the first column:
   1 = Account ID
   2 = Effective Dates

2. Select the field to appear initially            _____
   in the second column:
   1 = Service Street Address
   2 = Customer Phone Number
   3 = Bill To  Phone Number
   4 = Memo Bill Phone Number
   5 = 3rd Party Phone Number

3. Select the field to appear initially            _____
   in the third column:
   1 = Customer Name
   2 = Bill To Name
   3 = Memo Bill Name
   4 = 3rd Party Name

PROCESSING DEFAULTS
4. Enter a '1' if you wish to access               _____
   the CIS Snapshot screen automatically
   when only 1 account is retrieved as a
   result of the search. Leave blank to
   remain on the inquiry screen.

5. Enter the default for the inactive              _____
   account flag.

6. Enter the default for the Customer              _____
   Name address type:
   1 = Customer Address
   2 = Memo Bill Address
   3 = Bill to Address
   4 = Third Party Address

7. Enter the DREAM Writer version to use           _____
   for the call to CIS Snapshot program
   (P192011).  Default is ZJDE0001.
```

Processing Options for CIS Snapshot

```
PROCESSING DEFAULTS:
1. Enter the data type that will be        _____
   used to enter profile facts for
   through the Profile Data Entry
   window.  This window will display
   upon exiting the Snapshot screen and
   if this processing option is not
   blank.

2. Enter the DREAM Writer version for      _____
   the call to Work Order Entry (P4819).
   Default is ZJDE0001.

PROCESSING DEFAULTS (cont):
3. Enter the DREAM Writer Version for      _____
   the call to Account/Document
   Repository (P1957).  Default is
   ZJDE0001.

4. Enter the DREAM Writer Version for      _____
   the call to Work Order Workbench
   (P48219).  Default is ZJDE0001.
```

Work Order Processing

About Work Order Processing

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

- Search for specific work orders or groups of work orders
- Revise information, such as the priority of a work order and the date the order is scheduled
- Change the status of work orders as they move through the work order status flow
- Print hard copies of work orders for use by service personnel

Work order processing includes the following tasks:

- ❏ Locating work orders
- ❏ Revising work order information
- ❏ Changing work order status
- ❏ Working with work order scheduling
- ❏ Printing work orders
- ❏ Process priority work orders

Locating Work Orders

From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

Within a typical organization, there might be hundreds of work orders that await processing. You can use specific search criteria to limit your search for particular work orders. You can use any combination of search criteria to locate work orders with similar characteristics. For example, you can locate all the work orders for a work center that have reached a particular status. You can also locate all the field service orders that are scheduled on a particular date.

After you locate a work order, you can access a variety of forms and complete multiple tasks with a specific work order. For example, after you locate a work order, you can access the customer's service agreement without having to access additional menus.

▶ **To locate work orders**

On Work Order Workbench

1. To limit your search for specific work orders, complete any combination of the following fields:

   - Customer

   - Account ID

   - Task

   - Appliance

   - Branch

   - Dispatch Group

   - Scheduling Work Center

   - Status From

   - Status Thru

   - Date Scheduled From

   - Date Scheduled Thru

   - Street Address – Number

   - Street Address – Direction Prefix

   - Street Address – Name

   - Street Address – Type

   - Town Code

2. To access additional search fields, choose the Additional Search Criteria function.

3. On Additional Selections, complete any combination of the following fields to further limit your search for specific work orders:

   - Service Address Number

   - Parent Work Order

   - Business Unit

   - Manager

- Assigned To
- User ID
- Edit/Behavior Failure
- Date Taken From
- Date Taken Through
- Completed From
- Completed Through

4. On Work Order Workbench, choose Details if you need more information to determine which work order that you want.
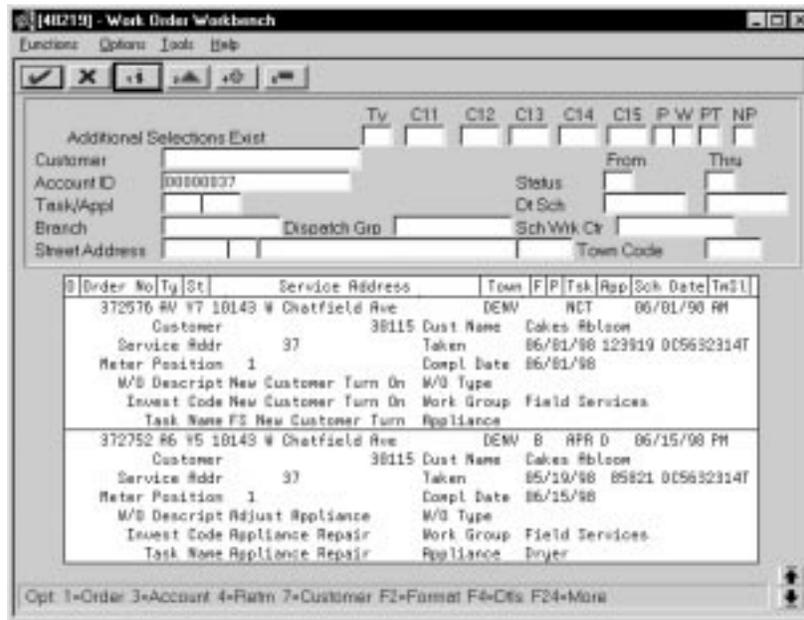
5. On Work Order Workbench, choose the Order option to access a specific work order.

Field	Explanation
Customer	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, special mailing addresses, and so on. . . . . *Form-specific information* . . . . The customer number on the work order.
Account ID	A free-form field that contains the account of a utility customer as the customer is intended to see it. This field must contain a unique value on each Service Agreement on which it is used.

Field	Explanation
Task Name	A user defined code (19/TN) that defines the actions that represent the nature of the work being performed, such as meter set, appliance repair, and so on.
Appliance	A code that designates a type of appliance, such as refrigerator, gas stove, electric furnace, and so on.
Branch	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: • Branch/Plant (MMCU) • Dept A (MCU) • Dept B (MCU) • Job 123 (MCU) Business unit security is based on the higher-level business unit.
Dispatch Grp	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.
Sch Wrk Ctr	The group of field personnel assigned to perform a work order. This group is supplied by the Work Center Cross Reference table when you create the order. You can change it as needed to reassign the order to another group.
Status Code – From	Enter a status code (00/SS) that you want the system to use as a beginning point for selecting work order information. There are three ways to enter the status code information: • Enter a range of statuses by entering codes in both the From and Thru fields. • Enter only a From code to view work orders beginning with a particular status. For example, 10 Thru displays all work orders with a status of 10 or more. • Enter only a Thru code to view work orders ending with a particular status. For example, Thru 40 displays all work orders with a status of 40 or less.

Field	Explanation
Status Code – Thru	Enter a status code (00/SS) that you want the system to use as an ending point for selecting work order information.
	There are three ways to enter the status code information: • Enter a range of statuses by entering codes in both the From and Thru Fields. • Enter only a From code to view work orders beginning with a particular status. For example, enter 10 in the From field and leave the Through field blank to display all work orders with a status of 10 or more. • Enter only a Through code to view work orders ending with a particular status. For example, leave the From field blank and enter 40 in the Through field to display all work orders with a status of 40 or less.
Date – Requested	The date that an item is to arrive or that an action is to be complete.
Date Through	Enter the end date through which you want to display items.
St.#	Identifies the sequential location portion of a street address.
Direction Prefix	Identifies a directional prefix for a street address such as North, South, East, West, Northwest, and so on.
St.Name	Identifies the name portion of a street address.
Street Type	A five–character alphanumeric field used to identify the type portion of a street address such as Avenue, Street, Road, Drive, and so on.
Town Code	A user defined code (19/TC) that identifies the town or city in which a service address is located. This code is used to expedite searches for service addresses, and it plays a role in determining the work center when you are scheduling work order for a service address.
Service Addr#	A field that allows you to enter either the Service Address number or the Parcel number. The program determines which field has been entered and verifies it accordingly.
Parent W/O	This is the parent work order number. You can use this number to: 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

Field	Explanation
Business Unit	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.
	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.
	Security for this field can prevent you from locating business units for which you have no authority.
	Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.
Manager	The address book number of a manager or planner.
	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 form. 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.)
Assigned To	Address number of the person assigned to do the work.
User ID	For World, The IBM-defined user profile.
	For OneWorld, the creator of the version.
Date Taken	The date that an order was entered into the system. This date determines which effective level that the system uses for inventory pricing.
Thru	The month end date in 12-period (monthly) accounting. The period end date in 13-period, 52-period, or 4-4-5 period accounting.
Completed	The date the work order or engineering change order is completed or canceled.
Thru	The month end date in 12-period (monthly) accounting. The period end date in 13-period, 52-period, or 4-4-5 period accounting.

Processing Options for Work Order Workbench

```
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 a Work Order Type if you want        _____
   to default a value into the Type
   field on the screen.  Leave blank for
   no default.

DEFAULT PROCESSING (cont):
3. Enter the defaults for the following:
      a. Category Code 11                      _____
      b. Category Code 12                      _____
      c. Category Code 13                      _____
      d. Category Code 14                      _____
      e. Category Code 15                      _____
      f. Priority                              _____
      g. Work Group                            _____

4. Enter a '1' to default today's date        _____
   as the from and through Date Taken
   in the additional selections window.

FORMAT CONTROL:
5. Enter a '1' to display the Service         _____
   Address screen format.
   Enter a '2' to display the Work Order
   Description screen format.
   Enter a '3' to display the Customer
   Name screen format.
   (Default is '1')

6. Enter a '1' to display schedule date       _____
   on main line.  Default of blank will
   display completion date on main line.

DREAM WRITER VERSIONS:
7. Enter the DREAM Writer version to use
   for the following program calls.
   Default version in all cases is
   ZJDE0001:
      a. Work Order Entry (P4819)              _____
      b. Edit Rule Execution (X4891)           _____
      c. Work Order Print (P19425)             _____
```

Revising Work Order Information

You can change a variety of information about a work order as the order progresses through the status flow. For example, after a work order is first entered, you can add or modify information, such as:

- The work center assigned to perform the task
- Additional customer instructions for gaining building access
- The date on which the work order is scheduled

Complete the following tasks:

❑ Changing information on the work order master

❑ Changing additional work order information

See Also

- *Understanding the Work Order Status Flow* for more information about edit rules and behaviors
- *Changing the Status of Work Orders* for more information about changing the status flow information of a work order
- *Working with Work Order Scheduling* for more information about changing the schedule date and time for a work order
- *Locating Work Orders* for the processing options for Work Order Workbench

Changing Information on the Work Order Master
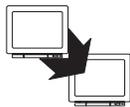
From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

You can change a variety of information on the work order master as the work order moves through the status flow. For example, you can revise the schedule date of a work order to adjust the work load of a particular work center. Other information you can change includes:

- Labor and material charge amounts

- Work order priority

- Work order type

- Category codes 11 – 15

After the system accepts an order with no failed edits or behaviors, you cannot change the task name or appliance code. Other edit rules and activity rules might be in effect that limit the amount of information that you can change.

When you change information on the work order master, you modify records in the Work Order Master table (F4801) and the Work Order Extension table (F4819).

▶ **To change information on the work order master**

On Work Order Workbench

1. Complete the steps for locating a work order.

   See *Locating Work Orders*.

2. On Work Order Entry, revise any information on the work order as necessary.

What You Should Know About

Additional system requirements for changing work order information

Depending on your system setup and the work order information you change, the system might require you to complete additional information. For example, if you attempt to change the schedule date to a day for which no resources are available, the system displays the Schedule Appointment form.

Revising information from Work Order Workbench

You can revise some information for a work order or a group of work orders without accessing the work order master. From Work Order Workbench, you can change the following information:

- Status
- Schedule Date
- Time Slot

See *Changing the Status of Work Orders* for more information about the consequences of changing a work order's status.

See *Revising Schedule Date and Time* for more information about changing scheduling information.

See Also

- *Processing Options for Work Order Entry*

Changing Additional Work Order Information
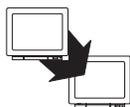
From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

You can revise any additional information you included on Additional Order Information. For example, you can revise the following types of information:

- Category codes

- Business unit information

- Parts information

When you change additional work order information you modify records in the Work Order Master table (F4801) and the Work Order Extension table (F4819).

▶   **To change additional work order information**

On Work Order Workbench

1. Complete the steps for locating a work order.

   See *Locating Work Orders*.

2. On Work Order Entry, choose the Additional Order Information function.
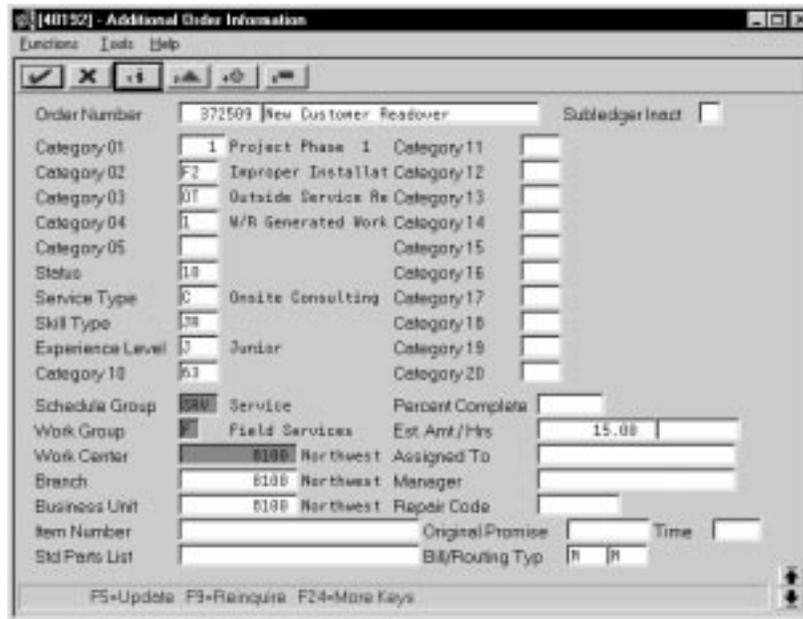
3. On Additional Order Information, revise information as necessary.

Changing Work Order Status

You communicate the progress of work by changing the work order status. Work order statuses refer to the steps through which a work order must pass, from its creation to its completion. You use processing options to specify the initial status of a successfully entered work order.

Each status through which a work order passes can be defined to enforce rules (called edit rules) as well as perform actions (called behaviors) that are relevant or necessary to the work order as it reaches that status. For example, when you change the status of an appliance repair work order to complete, you can specify that the user verify the existence of an active service agreement (an edit rule), and the system write special charges to the Special Charges table (a behavior).

Changing work order status includes the following tasks:

❑ Changing the status of a single work order

❑ Changing the status of multiple work orders

See Also

- *Locating Work Orders* for the processing options for Work Order Workbench

Example: Changing the Status of an Order to Complete

The following example shows the progression of events when you change the status of a new customer turn on order from On Site to Complete and is meant to represent a typical status change. Depending on the edit rules and behaviors you specify for a particular work group and type of work order, other edit rules might be in effect that require you to satisfy several conditions before you can change the status of the work order. In addition, behaviors might be in effect which trigger the system to perform a variety of actions when the status of the work order changes.

When you attempt to change the status of a new customer turn-on order from On Site to Complete, the Status Change Date and Time window appears. You can accept the values that the system displays or change them, after which the system performs the following behaviors:

- MTRPOSACT – The system changes the active meter flag for the meter position and updates the on/off date for the meter position with the completion date from the work order.

- MTRREADING – The system displays the Meter Reading Revisions form (V19301) to allow you to enter an initial meter reading for the service set to commence.

- UPWOCMPDT – The system enters a work order completion date, using the date from the Status Change Date and Time window.

For this example, there are no edit rules in effect. When all behaviors have run successfully, the system accepts the status change.

Changing the Status of a Single Work Order
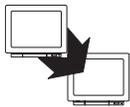
From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

Change the status of a single work order when you need to communicate and record the progress of work.

▶ **To change the status of a single work order**

On Work Order Workbench

1. Complete the steps to locate a work order.

   See *Locating Work Orders*.

2. On Work Order Entry, complete the following field:

   - Status
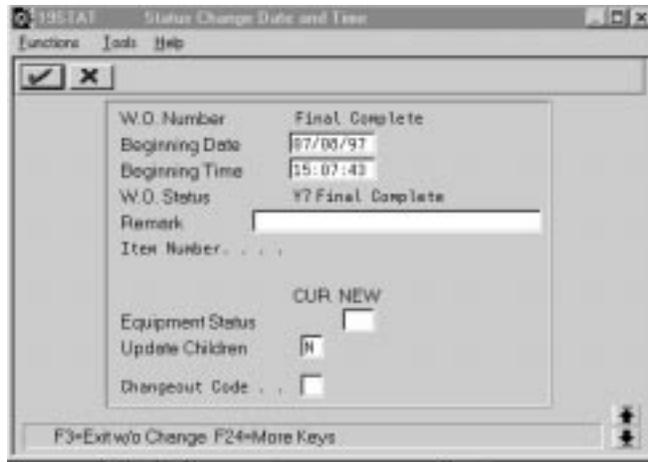
3. On Status Change Date and Time, verify that the information is correct.

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

See Also

- *Understanding the Work Order Status Flow* for information about factors that determine whether the system requires you to enter additional information before it accepts the status change you specify

Changing the Status of Multiple Work Orders

From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

You can change the status of a group of similar work orders. You use selection criteria to search for a group of work orders whose status you want to update, and then change any of the work orders that meet your selection criteria.

▶ **To change the status of multiple work orders**

On Work Order Workbench

1. To limit your search for specific work orders, complete any combination of the following fields:

   - Customer

   - Account ID

   - Task

   - Appliance

   - Branch

   - Dispatch Group

   - Scheduling Work Center

   - Status From

   - Status Thru

   - Date Scheduled From

   - Date Scheduled Thru

   - Street Address – Number

   - Street Address – Direction Prefix

   - Street Address – Name

   - Street Address – Type

   - Town Code

2. To access additional search fields, choose the Additional Search Criteria function.

3. On Additional Selections, complete any combination of the following fields to further limit your search for specific work orders:

   - Service Address Number

   - Parent Work Order

   - Business Unit

   - Manager

   - Assigned To

   - User ID

   - Edit/Behavior Failure

   - Date Taken From

   - Date Taken Through

- Completed From

- Completed Through

4. Complete the following field, and then choose the Change function:

- Status

See Also

- *Understanding the Work Order Status Flow* for information about factors that determine whether the system requires you to enter additional information before it accepts the status change you specify

Working with Work Order Scheduling

When you create a work order, the system automatically schedules it based on scheduling criteria that you enter, such as requested date and time and the nature of the work. You must enter scheduling criteria within a variety of constraints, such as the following:

- The date and time of day a customer will allow access to the work area
- The availability of labor resources on a given day and time
- Unforeseeable demands on a work center, such as an influx of emergency work orders, priority work orders, and so on

You can use several methods to ensure that you have adequate resources to handle the work orders you schedule. For example, should a scheduling conflict arise, you can:

- Reschedule work orders to a different day or time of day
- Reassign work orders to a different work center
- Revise the capacity of a work center
- Schedule work orders to an over-capacity work center

Working with work order scheduling includes the following tasks:

❏ Entering a schedule date and time

❏ Revising the schedule date and time

❏ Managing work center resources

See Also

- *Locating Work Orders* for the processing options for Work Order Workbench
- *Creating Work Orders* for the processing options for Work Order Entry

Entering a Schedule Date and Time

From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

After you create a work order, you must enter a schedule date and time that the system uses to assigned available resources. Typically, you enter a schedule date and time to best accommodate the needs of the customer. If the work order is a non-premise work order, you can enter a schedule date and time according to the resources available at the work center responsible for completing the work.

▶ To enter a schedule date and time

On Work Order Workbench

1. Complete the steps to locate a work order.

   See *Locating Work Orders.*

2. On Work Order Entry, choose the Schedule Appointment function.

3. On Schedule Appointment, choose the Select option for the schedule date and time you want.

What You Should Know About

Choosing an alternate work center   If there are no schedule dates and time slots available at the primary work center to satisfy your scheduling requirements, you can specify that the system display all work centers. Enter a 1 or a 2 in the Alternate Work Center field.

Displaying over-capacity work centers   You can specify that the system display all time slots, including those that are over-capacity. Enter a 1 in the Over Capacity field.

Revising the Schedule Date and Time
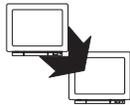
From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

You can revise the day and time slot for which a work order is scheduled. You can revise the scheduling information for a single work order or for a group of similar work orders. For example, you might need to reschedule a single appliance repair work order to accommodate a change in a customer's schedule. Or you might need to reschedule a group of work orders from one day to another if a work center is unable to perform work on a previously scheduled day.

Complete the following tasks:

❑ Rescheduling a single work order

❑ Rescheduling multiple work orders

Rescheduling a Single Work Order

You typically reschedule a single work order in response to a customer's request or, for larger projects, to accommodate the needs of a work center.

▶   **To reschedule a single work order**

On Work Order Workbench

1. Complete the steps to locate a work order.

    See *Locating Work Orders.*

2. On Work Order Entry, choose the Schedule Appointment function.

3. On Schedule Appointment, complete or revise the following fields in the header portion of the form:

   - Requested Date
   - Time Slot

4. Complete the following optional fields:

   - Alternate Work Center
   - Over Capacity

5. Choose the Select option next to the schedule date and time that you want.

   If the schedule date and time you choose has inadequate hours remaining, the Over Capacity Password window appears.

```
[48761] - Over Capacity Password                          _ □ ×
Functions   Tools   Help

  ✔   ✗

              Password        [            ]
              Order Number      382791 YI
              Date              02/01/98
              Hours Req         2.00
              Time Slot

 F3=Exit   F24=More Keys
```
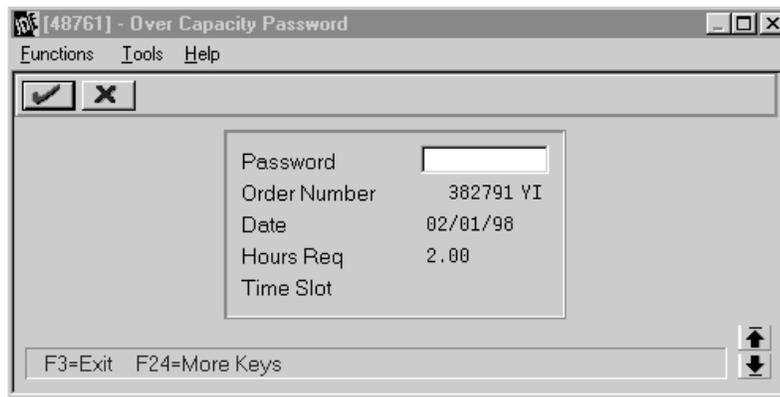
6. On Over Capacity Password, complete the following field and press Enter:

   - Password

Field	Explanation
Time Slot	This field is used by UCIS to further define daily capacity and scheduled work orders. This field allows for groupings of capacity and load at smaller categories than one day.
Alt. Work Center	This field is used to control which work centers will be displayed: 0 Only the primary work center will be displayed. 1 Only the first work center with availability will be displayed. 2 All alternate work centers will be displayed.
Over Capacity	This field is used to control whether all schedule pool records are displayed or only those with sufficient capacity remaining to perform the work order.

Field	Explanation
Password	A character string that you must enter to over schedule work center capacity. The password is defined on the System Constants form.

Rescheduling Multiple Work Orders

You can revise the schedule date and time for a group of similar work orders. For example, you might need to reschedule all contract inspection work orders for a particular work center to a different day due to an inspector's absence.

You use selection criteria to narrow your search to the specific work orders that you need to reschedule.

▶   **To reschedule multiple work orders**

On Work Order Workbench

1. To limit your search for specific work orders, complete any combination of the following fields:

    - Customer

    - Account ID

    - Task

    - Appliance

    - Branch

    - Dispatch Group

    - Scheduling Work Center

    - Status From

    - Status Thru

    - Date Scheduled From

    - Date Scheduled Thru

    - Street Address – Number

    - Street Address – Direction Prefix

    - Street Address – Name

    - Street Address – Type

    - Town Code

2. To access additional search fields, choose the Additional Search Criteria function.

3. On Additional Selections, complete any combination of the following fields to further limit your search for specific work orders:

- Service Address Number
- Parent Work Order
- Business Unit
- Manager
- Assigned To
- User ID
- Edit/Behavior Failure
- Date Taken From
- Date Taken Through
- Completed From
- Completed Through

4. For each work order, revise the information in the following fields as appropriate:

- Schedule Date
- Time Slot

If you enter a date or time slot for which no resources are available, the Schedule Appointment form appears.

See Also

- *Locating Work Orders (P48219)*
- *Revising the Capacity of a Work Center (P4873)*
- *Overriding an Over-Capacity Work Center (P48761)*
- *Rescheduling a Work Order (P4819)* for more information about using the Schedule Appointment form

Managing Work Center Resources

If you are not able to schedule a work order to a particular work center, you can perform several tasks to overcome the scheduling conflict. For example, you can:

- Assign work orders to another work center
- Revise the capacity of a work center
- Assign a work order to an over-capacity work center

Complete the following tasks:

❏ Assigning a work order to an alternate work center

❏ Revising the capacity of a work center

❏ Overriding over-capacity work centers

Assigning a Work Order to an Alternate Work Center
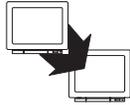
From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

You can assign work orders to alternate work centers. This is especially useful when the primary work center is at or over-capacity for the date and time a work order is scheduled and for which it is impossible or impractical to schedule the work order for a different date or time.

▶ **To assign a work order to an alternate work center**

On Work Order Workbench

1. Complete the steps to locate a work order.

   See *Locating Work Orders*.

2. On Work Order Entry, choose the Schedule Appointment function.

3. On Schedule Appointment, enter 1 or 2 in the following field:

   • Alternate Work Center

   Depending on the value you enter, the system displays the next available work center, or all work centers with available resources. You define the relationship of primary and alternate work centers on Structure Revisions.

4. Choose the Select option next to the work center and time slot to which you want to assign the work order.

See Also

• *Setting Up Alternate Work Centers (P4897)* for more information about using structure revisions

Revising the Capacity of a Work Center

From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Schedule Pool by Work Center

You can interactively adjust resources at a work center to accommodate unpredictable day-to-day demands and schedule work orders that otherwise could not be scheduled. You do not need to regenerate resource units and reallocate capacity to time slots. This is especially useful if you want to make temporary adjustments to a work center's capacity, such as to account for employee overtime or to add temporary labor resources.

The revisions you make on Schedule Pool by Work Center modify records in the Schedule Pool Master table (F4873). If you subsequently regenerate resource units and reallocate capacity to time slots, the system overwrites the changes you make on this form with the new scheduling information.

▶ **To revise the capacity of a work center**

On Schedule Pool by Work Center
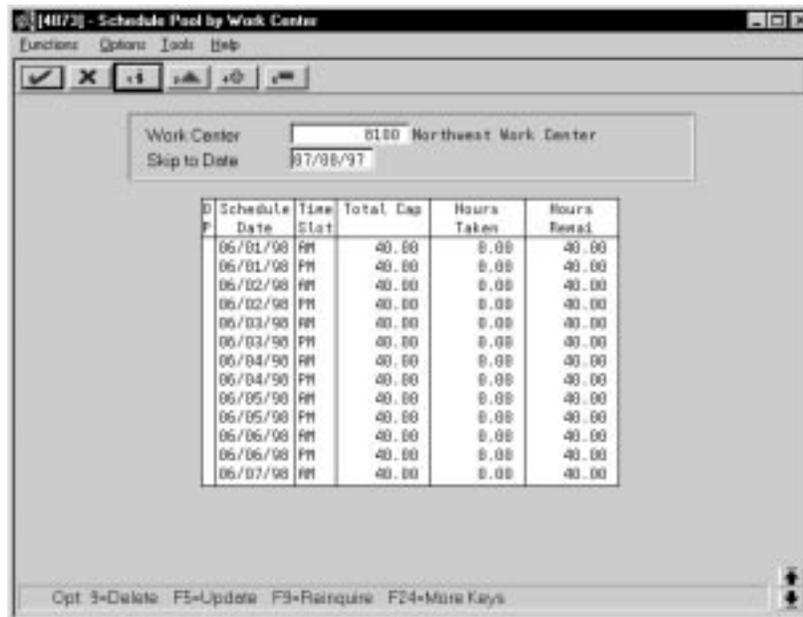
1. Complete the following field:

   • Work Center

2. Complete the following optional field:

   • Skip to Date

3. For each schedule date and time slot you want to revise, complete the following field:

   • Total Capacity

Field	Explanation
Skip to Date	This is the date that the customer requested the work to be completed. This date is used by the scheduling program to match available work centers to work orders.
Total Cap	This is the total amount of hours for a given work center on a particular day and time slot combination. This can be manually entered or changed. It can also be automatically created or updated from the resource units table.

See Also

- *Setting Up Work Center Scheduling* for more information about generating resource units and allocating capacity to time slots

Overriding an Over-Capacity Work Center
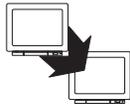
From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

You can assign a work order to a work center for which there is not enough capacity to complete the work. This is especially useful when you need to accommodate high priority work orders. For example, you can override an over-capacity work center to be able to accommodate a customer's request when such a request justifies the possibility of resulting overtime expenses.

▶ **To override an over-capacity work center**

On Work Order Workbench

1. Complete the steps to locate a work order.

   See *Locating Work Orders*.

2. On Work Order Entry, choose the Schedule Appointment function.

3. On Schedule Appointment, enter 1 in the following field:

   - Over Capacity

4. Choose the Override option for the over-capacity work center to which you want to schedule the work order.

```
[48761] - Over Capacity Password                    _ □ ×
Functions   Tools   Help
┌─────┬─────┐
│  ✔  │  ✘  │
└─────┴─────┘

            Password          [          ]
            Order Number        382791 YI
            Date                02/01/98
            Hours Req           2.00
            Time Slot

 F3=Exit    F24=More Keys
```
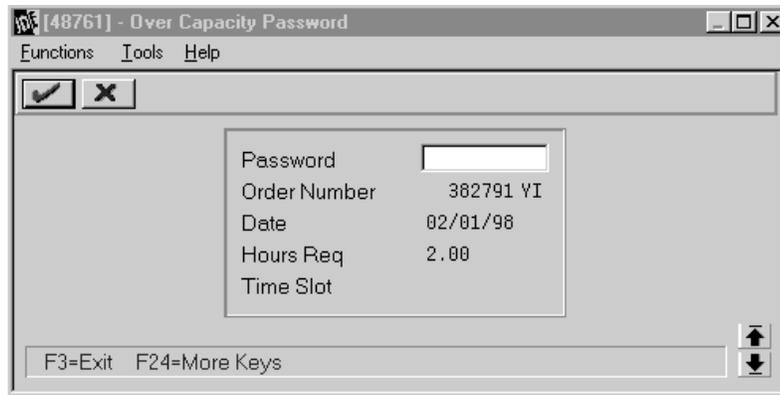
5. On Over Capacity Password, complete the following field:

   • Password

What You Should Know About

Investigation Codes   The system might not allow you to override an over-capacity work center for certain investigation codes.

See *Setting Up Investigation Codes* for more information.

Printing Work Orders

You can print work orders manually whenever you need a hard copy of an order, such as for field personnel who do not have access to the system. You can print work orders either interactively or in batch. When you print work orders interactively, you can print individual work orders or groups of related work orders.

Printing work orders includes the following tasks:

- ❏ Printing individual work orders

- ❏ Printing multiple work orders

See Also

- *Setting Up the Work Order Status Flow* for information about setting up the system to print work orders automatically

Printing Individual Work Orders

From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Workbench

You can print individual work orders when you need a hard copy of the order. For example, field service technicians might need a hard copy of each work order for which they are responsible. If you already know the work order number, you can quickly print the work order from the work order master.

▶ **To print individual work orders**

On Work Order Workbench

1. Complete the steps to locate a work order.

   See *Locating Work Orders*.

2. On Work Order Entry, choose the Print Work Orders function.

See Also

- *Locating Work Orders* for the processing options for Work Order Workbench

- *Entering Work Orders* for the processing options for Work Order Entry

Printing Multiple Work Orders

From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Print

You can print a batch of work orders by using data selection criteria to specify the work orders that you want to print.

See Also

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

Processing Options for Work Order Print

```
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           _____
   Instuctions 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 the maximum number of parent         _____
   equipment records to print.

7. Enter the maximum number of child          _____
   equipment records to print.
8. Enter the data type for Priority:          _____

9. Enter the number of days(prior to          _____
   current date) of closed work orders
   to print.

10.Enter the maximum number of closed         _____
   Work Orders to print.

11.Enter the value of Alert Level:            _____
   This will display all profile
   information at this level and
   greater.

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

13. Enter the version of the Edit Rule        _____
    program to execute. (X4891)
    (blanks will default to ZJDE0001)
```

Processing Priority Work Orders

You use a messaging facility to ensure that the appropriate people are notified about priority work orders. You first need to create a subsystem for the messaging facility to run in. Typically, you should need to do this only once. The messaging facility runs until you stop it. You can stop it if, for example, you need all system resources to perform backups. You can then start it up again after performing the backups. You can also stop the messaging facility and delete the subsystem.

Processing priority work orders includes the following tasks:

- ❏ Starting subsystem and batch job

- ❏ Starting batch job only

- ❏ Stopping batch job only

- ❏ Stopping subsystem and batch job

Starting Subsystem and Batch Job
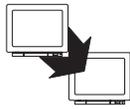
From Utility Customer Information (G19), enter 27

From UCIS Technical and Advanced Operations (G193), choose Work Order Monitoring

From Work Order Monitor Control (G1931), choose Start Subsystem and Batch Job

You need to create the subsystem in which the messaging facility runs. This procedure starts the messaging facility. Typically, you only need to do this once.

This is a DREAM Writer program.

What You Should Know About

Existing subsystem   If a subsystem already exists when you run this program, the system does the following before creating the subsystem:

- Clears the job queue
- Deletes the class
- Deletes the job queue
- Deletes the subsystem description

Authorization to run program   To run this program, you need authority to perform the following commands:

- CLRJOBQ (clear job queue)
- DLTCLS (delete class)
- DLTJOBQ (delete job queue)
- DLTSBSD (delete subsystem description)
- CRTCLS (create class)
- CRTJOBQ (create job queue)
- CRTSBSD (create subsystem description)
- ADDJOBQE (add job queue entry)
- ADDRTQE (add routing queue entry)
- STRSBS (start subsystem)

Processing Options for Start Subsystem and Batch Job

```
1. Enter the name of the work order                    _____
   monitoring subsystem.

2. Enter the DREAM Writer version of                   _____
   start work order monitor to be used.
   If blank, ZJDE0001 is used.
   (see Form ID J488212)
```

Starting Batch Job Only

From Utility Customer Information (G19), enter 27

From UCIS Technical and Advanced Operations (G193), choose Work Order Monitoring

From Work Order Monitor Control (G1931), choose Start Batch Job Only

If all system resources are needed when you perform backups, you can start the messaging facility after performing backups. If no subsystem exists for the messaging facility, this program ends in error. You then need to create a subsystem.

See *Starting a Subsystem and Batch Job*.

This is a DREAM Writer program.

What You Should Know About

Authorization to run program

To run this program, you need authority to perform the following commands:

- ALCOBJ (allocate object)
- DLCOBJ (de-allocate object)
- WRKSBSJOB (work with subsystem jobs)
- SBMJOB (submit job)

Processing Options for Start Batch Job Only

```
1. Enter the name of the work order                    _____
   monitoring subsystem.

2. Enter the DREAM Writer version of                   _____
   work order monitor to be used.
   If blank, ZJDE0001 is used.
   (see Form ID P48821)
```

Stopping Batch Job Only

From Utility Customer Information (G19), enter 27

From UCIS Technical and Advanced Operations (G193), choose Work Order Monitoring

From Work Order Monitor Control (G1931), choose Terminate Batch Job Only

If all system resources are needed when you perform backups, you can stop the messaging facility before performing backups. This program does not delete the subsystem.

This is a DREAM Writer program.

What You Should Know About

Authorization to run program

To run this program, you need authority to perform the following commands:

- ALCOBJ (allocate object)
- DLCOBJ (de-allocate object)

Stopping Subsystem and Batch Job
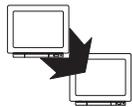
From Utility Customer Information (G19), enter 27

From UCIS Technical and Advanced Operations (G193), choose Work Order Monitoring

From Work Order Monitor Control (G1931), choose Terminate Subsystem and Job

You can stop the messaging facility and delete the subsystem from the system.

This is a DREAM Writer program.

What You Should Know About

Authorization to run program

To run this program, you need authority to perform the following commands:

- DLYJOB (delay job)
- ENDSBS (end subsystem)
- CLRJOBQ (clear job queue)
- DLTCLS (delete class)
- DLTJOBQ (delete job queue)
- DLTSBST (delete subsystem description)

Processing Options for Terminate Subsystem and Job

```
1. Enter the name of the work order                 _____
   monitoring subsystem.
```

Setup

System Setup

About System Setup

Before you can use the work management features in UCIS, you need to define certain information to customize the system for your business needs. This information consists of:

System constants

You set up system constants to control how your business uses work management features. For example, you define which category codes are used to represent a meter's number of dials and its multiplier. You also use system constants to specify the password for scheduling a work center over its capacity.

User defined codes

Many fields throughout UCIS accept only user defined codes. You can customize fields in your system by setting up user defined codes to meet the needs of you business environment. For example, you set up the allowed values for appliance codes, task names, and so on.

Next numbers

You set up next numbers to enable the system to automatically assign unique numbers for certain items. For example, when you create new work orders, the system automatically assigns each work order a unique number.

Profile data types

You set up profile data types to track and report on a variety of user defined supplemental data to maintain for service addresses

System setup includes the following tasks:

❑ Setting up system constants for work management

❑ Setting up user defined codes for work management

❑ Setting up next numbers for work management

❑ Understand profile data

❑ Setting up profile data for work management

Setting Up System Constants for Work Management
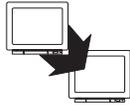
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose System Setup

From System Setup (G1941), choose System Constants

You set up constants to control how your business uses certain UCIS features. Specifically, you must set up constants that specify which category codes the system uses to store the meter multiplier and the number of meter dials. In addition, you set up the password that you need to schedule a work center over its capacity. After you set up these constants, data entry is restricted to these values.

UCIS Work Management users share system constants with UCIS Customer Service users. You should work with the system administrator for UCIS Customer Service to coordinate the setup of system constants.

▶ **To set up system constants for work management**

On System Constants

Complete the following fields:

- Category Code for Multiplier
- Category Code for Dials
- Password

Field	Explanation
Category Code for Multiplier	The category code from the Meter Master table that will be used to store the meter multiplier.
Category Code for Dials	The category code from the Meter Master table that will be used to store the number of meter dials.
Password	A character string that you must enter to over schedule work center capacity. The password is defined on the System Constants form.
	. . . . *Form-specific information* . . . .
	The password is needed to schedule a work order to a work center that does not have adequate remaining resources to accept the work.

Understanding User Defined Codes

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose System Setup

From System Setup (G1941), choose General User Defined Codes

Many fields throughout UCIS accept 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, 19/MR represents system 19 (UCIS) and user defined code list MR (meter reading routes). 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 Meter Route field on the Meter Position form that exist in the user defined code table for system 19 and code type MR.

You can access all user defined code tables through a single user defined code form. After you select a user defined code form 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).

User defined codes are central to J.D. Edwards systems. You must be thoroughly familiar with user defined codes before you change them.

The following user defined codes are primary to the work management features within the Utility Customer Information System:

Appliance codes (19/AC) Use these codes to define the types of machines that consume the delivered utility at the customer address.

Behavior codes (19/BH) Use these codes to define the actions that the system takes when a work order reaches a particular status.

Meter reading routes (19/MR) Use these codes to establish meter reading routes to which you can assign meter positions.

Schedule groups (19/SG) A classification under work group that allows division of tasks within a work group to separate work centers.

Service types (19/ST) Use these codes to define the type of utility being delivered, such as gas, water, electricity, and so on.

Town codes (19/TC) Use these codes to represent the communities that are served within the utility service area.

Task names (19/TN) Use these codes to define the actions that represent the nature of the work being performed, such as meter set, appliance repair, and so on.

Time slots (19/TS) Use these codes to represent the segments of the day in which work is scheduled and committed to the customer.

Violation types (19/VT) Use these codes to represent the different hazardous conditions that might be detected on a service call.

Edit rules (48/ER) Use these codes to define the conditions that must be met before the system will allow a work order to progress to a particular status. These values should not be changed by the user.

Edit rule/behavior failure codes (48/FC) The system uses these codes to indicate whether an edit rule or behavior has failed for a work order. These values should not be changed by the user.

Work order print format (48/WP) Use these codes to represent the sections of related data that appear on printed work orders. These values should not be changed by the user.

Work groups (00/TY) The broadest division of work forces at the utility, such as field service and engineering.

Document types (00/DT) The tasks that the utility performs, such as meter set and furnace repair.

Work order statuses (00/SS) Use these codes to define the steps through which a work order passes as it progresses through the work order status flow.

Work order category codes 1–10 (00/W1–W0) Use these codes to identify relationships or groupings of related work orders.

Work order category codes 11–20 (00/X1–X0)   Use these codes to identify relationships or groupings of related work orders.

Type of day codes (00/TD)   Use these codes to represent the types of days upon which different scheduling rules are applied, such as weekdays, weekends, holidays, and so on.

Work order database codes (00/WD)   Use these codes to group classes of work order supplemental data.

Work order record type codes (00/RT)   Use these codes to represent types of additional textual data you want to track for work orders.

See Also

- *Understanding User Defined Codes* and *Working with User Defined Codes (P00051)* in the *General Accounting I Guide* for information about user defined codes and how to set them up and maintain them

- *Understanding User Defined Codes* in the *UCIS Customer Service Guide* for information about user defined codes used by the customer service and billing features of the UCIS system

Understanding Next Numbers

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose System Setup

From System Setup (G1941), choose Next Numbers

You must set up next numbers to enable the system to automatically assign unique numbers for certain items.

You must set up next numbers for the following items that are used in work management:

Service address The system assigns a unique service address number to each new service address that you create. The system stores this next number in UCIS (system 19).

Work order number The system assigns a unique number to each work order that you or the system generates. The system stores this next number in the Work Orders system (system 48).

Schedule number The system assigns a unique number to individual schedule pool records for tracking purposes. This number has no other meaning and is not visible to the user. The system stores this next number in the Work Orders system (system 48).

J.D. Edwards recommends that you do not use blank as a next number value.

See Also

- *Setting Up Next Numbers (P0002)* in the *General Accounting I Guide* for information about next numbers and how to set them up

- *Understanding Next Numbers* in the *UCIS Customer Service Guide* for information about next numbers used by the customer service features of UCIS

Understanding Profile Data

Profile data is a feature that lets you store data by user defined categories, or types, that are not provided by UCIS. You define the types of profile data to suit the needs of your company. The data stored can be entered by the user or supplied by the system, depending on how you set up the data type. Data types can also trigger calls to programs, including user-written programs.

You can set up profile data types for the following entities:

- Service agreements
- Service addresses
- Customers

You can use profile data to store information about a service address such as square footage, number of floors at the address, number of units in the structure, and map coordinates. You can use this information to offer services that the utility provides as well as store information for interfaces with external systems.

You can also use profile data to track system supplied information such as work order violations at the address.

You can choose one of four display modes for each profile data type:

- Columnar, allowing multiple entries
- Columnar, allowing one entry
- Free-form text
- Program call

Columnar Display Mode Allowing Multiple Entries

The columnar display mode displays six columns:

- Date From
- Code
- Amount
- Data Item 1
- Data Item 2
- Date Thru

The Date From and Date Thru fields are predefined for dates. The other four fields are user defined. You define the data that each column displays for a given data type by assigning a data dictionary data item to the column.

Columnar Display Mode Allowing One Entry

This display mode is the same as the columnar display mode allowing multiple entries, except that it allows only one entry. It is for data that you will enter only once. For example, when a new address is established, you can indicate that it has been inspected.

Free-Form Text Display Mode

The free-form text display mode causes a window to appear that lets you enter textual information.

Program Call Display Mode

The program call display mode accesses a specified program. For example, the Work with Folders data type accesses the Work with CIS Folders program (P1955).

Setting Up Profile Data for Work Management

Profile data is a feature that lets you store data by user defined categories, or types, that are not provided by UCIS. You use profile data in work management to further define service addresses in your system.

After you set up profile data, you can use it to report on and track details about service addresses that are important to your company. You can set up as many profile data types as you need. You can also control which users have access to specific types of profile data.

Setting up profile data for work management consists of the following tasks:

❑ Setting up profile types of data

❑ Setting up profile sequences

❑ Setting up profile security

See Also

- *Set Up Profile Data for Customer Service* in the *UCIS Customer Service Guide* for information about setting up profile data for service agreements and customers

Setting Up Profile Types of Data

You need to define the types of profile data that you want to provide for service addresses. You set up profile data for the service agreements and customers on the customer service side of the UCIS system.

Complete the following tasks:

❑ Set up columnar profile data types

❑ Set up profile data types that allow free-form text

❑ Set up profile data types that call a program

Setting Up Columnar Profile Data types
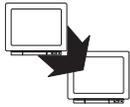
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Profile Setup

From Profile Setup (G1944), choose Profile Types of Data

Columnar data types contain user defined columns. You assign a data dictionary data item to each of these columns when you set up the data type. The data items provide the information for the columns.

▶   **To set up columnar profile data types**

On Profile Types of Data

1. For each type of profile data that you want to define, complete the following fields:

    - Ty Dta (Type Data)
    - Description

2. Enter 2 in the following field:

    - Prf Ent (Profile Entity)

3. Depending on whether you want the profile data type to allow multiple entries or only one entry, choose display mode 1 or 2 for the following field:

    - D M (Display Mode)

4. Complete the following optional fields:

- Cat (Category)

- Alt (Alert Level)

- Aud (Audit Trail)

- Amount Data Item

- Code Data Item

5. Access the detail area.

6. Complete the following optional fields:

- Y/N 1 Data Item

- Y/N 2 Data Item

Field	Explanation
Ty Dta	This is the unique identification for a kind of profile information.
Prf Ent	A Profile Entity can be a: 1 Service Agreement 2 Service Address 3 Customer
D M	The action that occurs when a user selects a certain type of data for entry: 1 Form appears allowing entry of code, amount, dates, and so on. In this case, multiple entries are allowed for the data type and free form text can be attached to each entry separately. 2 Same as 1 except only 1 entry is allowed for the data type. 3 Form appears allowing entry of free form textual data. 4 A J.D. Edwards or custom program is called.
Cat	A code that groups related types of data in the Profile for display purposes. For example, the types of data in the Profile for service addresses may be grouped into categories of site data, construction information, violations and alerts, and so on.
Alt	This indicates that the data entered is considered an alert and flagged on various screens. The number indicates the severity level of the alert.
Aud	For display modes of 1 or 2, this field indicates that Last Changed information is to be kept for the type of data.
Amount Data Item	This field specifies the data dictionary data item that will be used to edit and display the data on the screen for the amount field.

Field	Explanation
Code Data Item	This field specifies the data dictionary data item that will be used to edit and display the data on the screen for the code field.
Y/N 1 Data Item	This field specifies the data dictionary data item that will be used to edit and display the data on the screen for the first yes or no field.
Y/N 2 Data Item	This field specifies the Data Dictionary Data Item that will be used to edit and display the data on the screen for the second yes/no field.

Example: Columnar Display Mode Allowing Multiple Entries

The following example is profile data type VI, Violations:
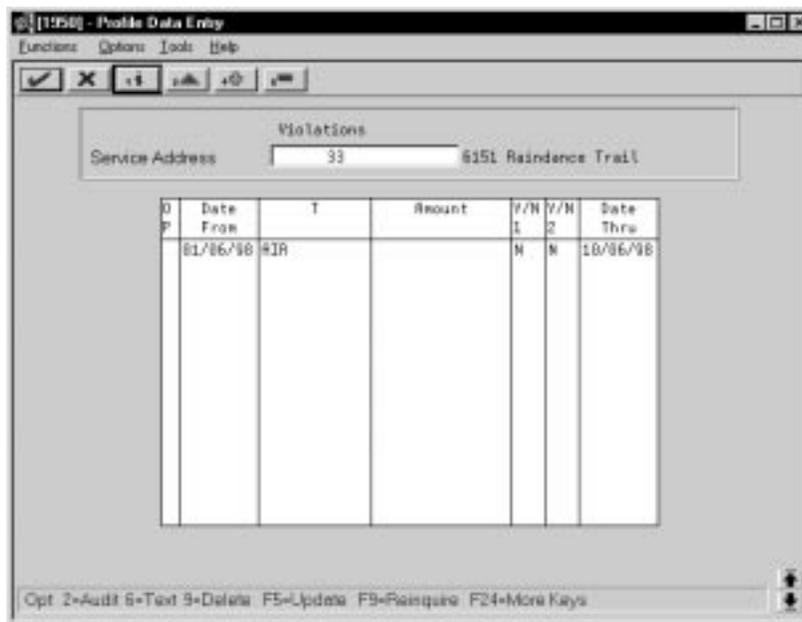
This data type shows all violations for the respective service address, such as unsafe conditions and vandalized meters. It shows the violation codes in the Violation Type (Code) column. The information in the Violation Type column is edited and displayed by data dictionary item VIOL (Violation).

The setup for this data type is as follows. Note the data item for the Code field.

O P	Ty Dta	Description	Cat	Prf Ent	D M	Alt	Aud	Amount Data Item	Code Data Item
	VI	Violations	C3	2	1		1		VIOL

Example: Columnar Display Mode Allowing One Entry

The following example is profile data type T5, Location Inspected:
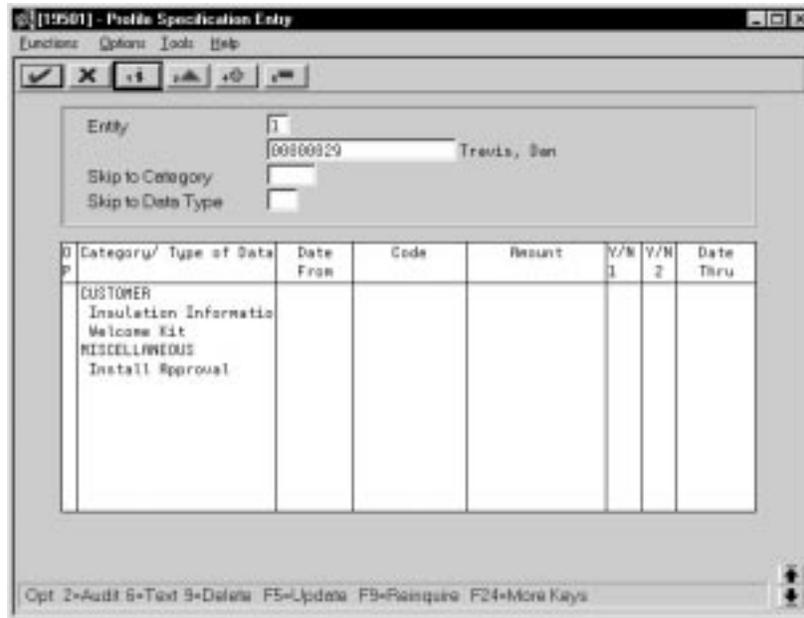
The setup for this data type is as follows. Note the data items for the Code and Amount fields.

O P	Ty Dta	Description	Cat	Prf Ent	D M	Alt	Aud	Amount Data Item	Code Data Item
	WK	Welcome Kit	CUST	1	2		1	AA	PYIN

Setting Up Profile Data Types That Allow Free-Form Text
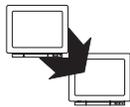
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Profile Setup

From Profile Setup (G1944), choose Profile Types of Data

You can set up data types that let the user enter text.

▶ **To set up profile data types that allow free-form text**

On Profile Types of Data

1. For each type of profile data that you want to define, complete the following fields:

   - Type Data
   - Description

2. Enter 2 in the following field:

   - Profile Entity

3. Choose display mode 3 for the following field:

   - Display Mode

4. Complete the following optional fields:

   - Category
   - Audit Trail

Example: Free-Form Text Display Mode

The following example is the text window for profile data type T8, Service Address Notes:
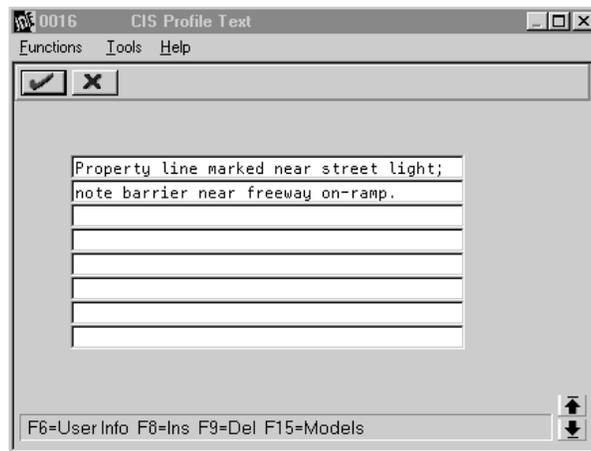
The setup for this data type is as follows:

OP	Ty Dta	Description	Cat	Prf Emt	D M	Alt	Aud	Amount Data Item	Code Data Item
	T8	Service Address Notes	C3	2	3				

Notice that the Amount Data Item and Code Data Item fields are empty.

Setting Up Profile Data Types That Call a Program
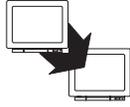
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Profile Setup

From Profile Setup (G1944), choose Profile Types of Data

You can set up data types that access programs.

▶ To set up profile data types that call a program

On Profile Types of Data

1. For each type of profile data that you want to define, complete the following fields:
   - Type Data
   - Description
2. Enter 2 in the following field:
   - Profile Entity
3. Choose display mode 4 for the following field:
   - Display Mode
4. Complete the following optional fields:
   - Category
5. Access the detail area.
6. Complete the following optional fields:
   - Program ID
   - Version
   - Existence Server

Field	Explanation
Program Id	Specifies the name of an executable program. This name must follow the standard AS/400 naming conventions and all of J.D. Edwards standards for program names (that is, the beginning character must be a J, P, or X).

Field	Explanation
Version	For World, identifies a group of items that the system can process together, such as reports, business units, or subledgers.
	For OneWorld, the name of the version. It is created when the version is added.
Existence Server	The identification, such as program number, table number, and report number, that is assigned to an element of software.

Example: Program Call Display Mode

For example, the Work with Folders data type accesses the Work with CIS Folders program (P1955). The setup for this data type is as follows:

O P	Ty Dta	Description	Cat	Prf Emt	D M	Alt	Aud	Amount Data Item	Code Data Item
	11	Work with Folders	C3	2	4				

Program ID P1955	Version	Existence Server
Y/N 1 Data Item	Y/N 2 Data Item	

Setting Up Profile Sequences

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Profile Setup

From Profile Setup (G1944), choose Profile Sequences

After you define profile types, you can revise the sequence in which they appear on Data Type Inquiry. The default sequence is alphabetic by Category then Type Data Code for each profile entity. You can specify a different sequence for individual users so that they see the types of data they work most frequently with at the top of the form.

▶ **To set up profile sequences**

On Profile Sequences
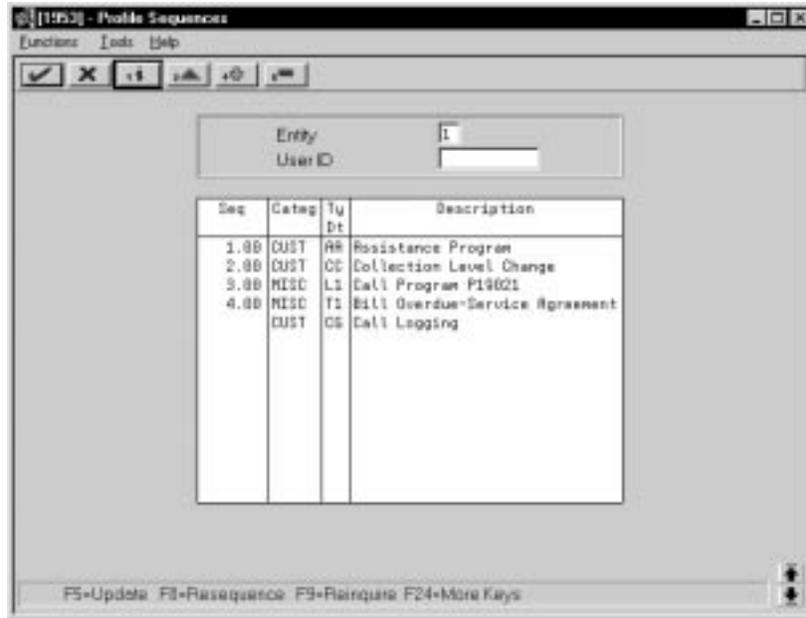
1. Locate the types of data a user sees by completing the following fields:

    • User ID

    • Entity

2. Using a Change action, complete the following field for each type of data:

    • Seq (Sequence)

Field	Explanation
User ID	For World, The IBM-defined user profile.
	For OneWorld, the creator of the version.
Seq	A number that reorders a group of records on the form.

What You Should Know About

Default sequence for all users	You can use user ID *PUBLIC to set up a default sequence for all users. Individual profiles override this default.
Types of data with no sequence	The system displays types of data that are not assigned a sequence number after those that are assigned numbers.

Processing Options for Profile Sequences

```
PROCESSING DEFAULTS:
1. Enter a '1' to process Display Mode          _____
   '2' Types of Data.  Default is to
   process Display Mode 1, 3, and 4
   Types of Data.
```

Setting Up Profile Security
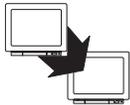
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Profile Setup

From Profile Setup (G1944), choose Profile Security

You can restrict the actions that individual users can perform on specific profile types of data.

▶ **To set up profile security**

On Profile Security
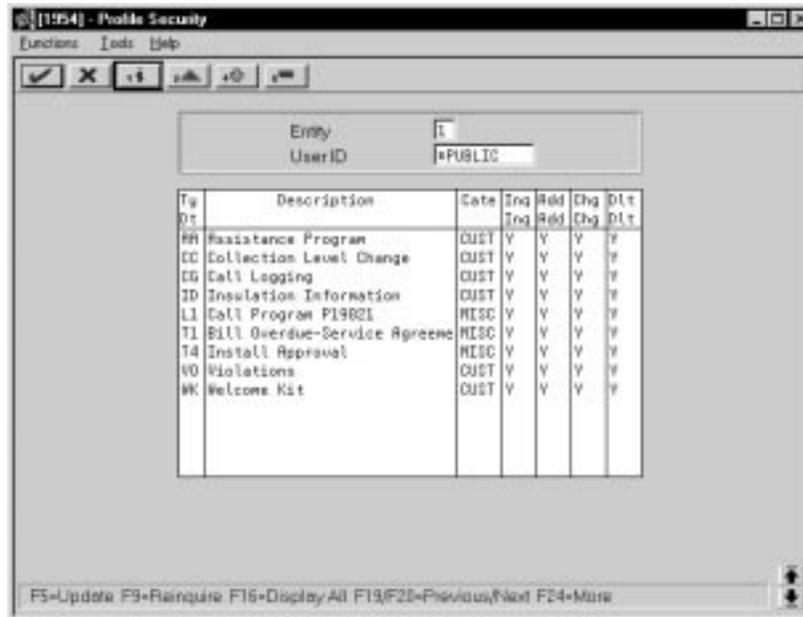
1.   Locate the types of data a user sees by completing the following fields:

   ● User ID

   ● Entity

2. Complete the following fields for each type of data:

- Allow Inq (Allow Inquiry)
- Allow Add
- Allow Chng (Allow Change)
- Allow Dlt (Allow Delete)

Field	Explanation
Allow Inq	This code determines whether an operator has the authority to inquire on records in programs that use Profile Security. The code is set up in Profile Security (P1954) by user for every Profile Type of Data.
Allow Add	This code determines whether an operator has the authority to add records on revision screens that are using profile security.
Allow Chg	This code determines whether an operator has the authority to change records on revision screens that are using profile security.
Allow Dlt	This code determines whether an operator has the authority to delete records on revision screens that are using profile security.

What You Should Know About

Default security scheme for all users	You can use user ID *PUBLIC to set up a default security scheme for all users. Individual profiles override this default.

Work Order Setup

About Work Order Setup

Before you can use the work order features in UCIS, you need to define certain information that the system uses to process work orders. The information that you define customizes the system for your business needs. For example, you might set up user defined codes to group and report on work orders by type, such as emergency work orders, appliance repair work orders, and so on.

Work order setup includes the following tasks:

❑ Setting up supplemental data for work orders

❑ Setting up record types for work orders

❑ Creating model work orders

❑ Setting up investigation codes

❑ Setting up the work order status flow

❑ Setting up print formats for work orders

❑ Setting up print control for work orders

❑ Setting up monitoring rules for work orders

❑ Setting up work center scheduling

The following table describes the work order setup features:

Work order supplemental data	You define work order supplemental data to track and report on work order details that are important to your company, but are not included in the work order master or in record types.
Work order record types	You set up work order record types to organize the textual details and notes that you track for work orders.
Model work orders	You create model work orders that serve as templates to provide default values for new work orders.

Investigation codes   You set up an investigation code for each unique combination of task and appliance that defines a type of service to be performed.

Work order status flow   You define the flow of allowed status codes for different types of work orders, as well as edit rules and behaviors that apply to the different status codes.

Work order print formats   You set up the layout and sequence of the data that appears on a printed work order

Work order print control   You define the rules that the system uses to determine where and when to print work orders.

Work order monitoring rules   You set up the rules that the system uses to notify users of the status of priority (emergency) work orders.

Work order scheduling   You set up the rules and tables that govern the system's ability to automatically assign work orders to the proper work centers, based on the nature and location of the work as well as resources available to perform the work.

Setting Up Supplemental Data for Work Orders

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Define Your Own Data Types

Use supplemental data to further define the work orders in your system. You can use supplemental data to track and report on work order details that are important to your business, but not included elsewhere. You can define as many types of supplemental data as you need. The supplemental data is similar to UCIS profile data, but is stored in a separate database.

You define and maintain supplemental data by work order database. Work order databases are user defined (00/WD). For example, you might set up separate sets of supplemental data for customer service orders and engineering orders. Within customer service orders, you might want to track data pertaining to safety or code violations.

▶   **To set up supplemental data for work orders**

On Define Your Own Data Types
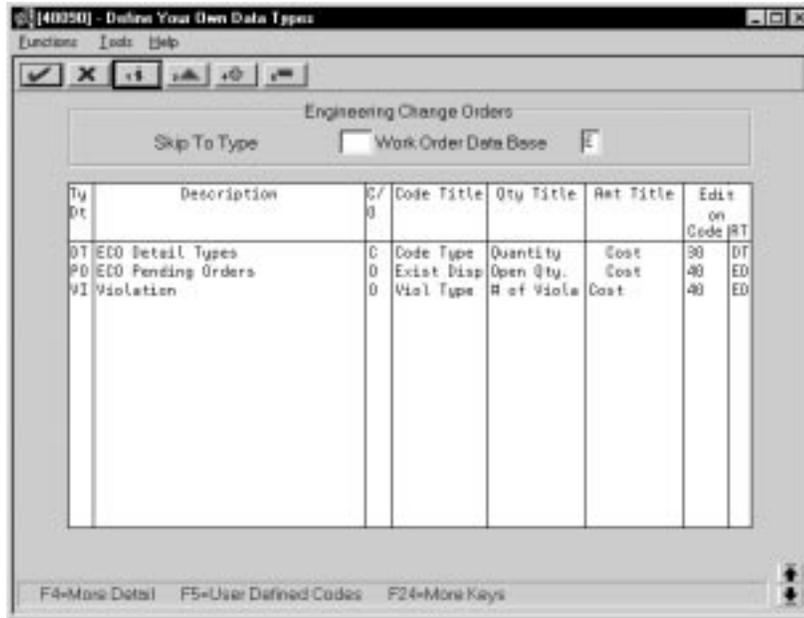
1. To specify a work order database, complete the following field:

    •   Work Order Data Base

2. To define a data type, complete the following fields:

    •   Ty Dt (Type Data)

    •   Description

    •   C/O (Display Format – Code or Order)

3. Complete the following optional fields:

    •   Code Title

    •   Qty Title (Quantity Title)

    •   Amt Title (Amount Title)

    •   Cod (System Code)

    •   RT (User Defined Code)

4. Access the detail area.
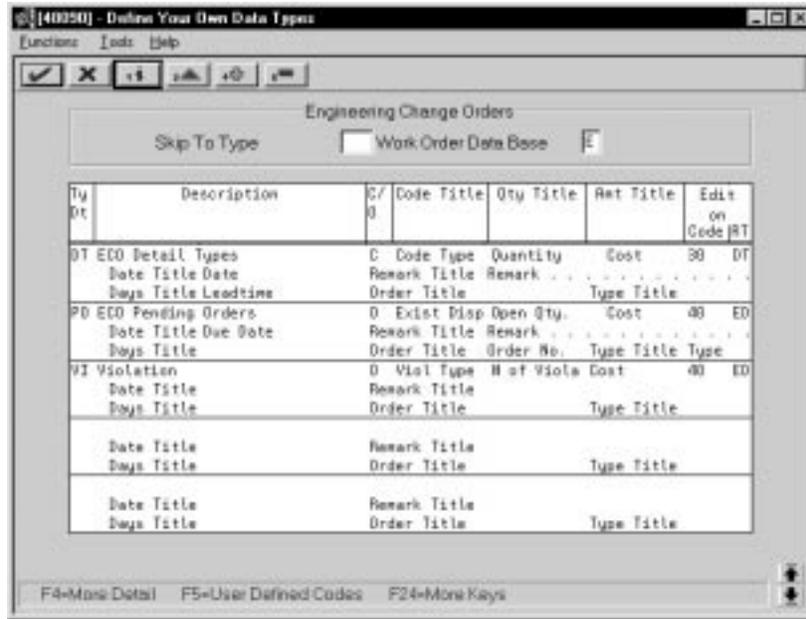
5. Complete any of the following optional fields:

- 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.

Field	Explanation
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.
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 J.D. Edwards system.
	A user defined code that identifies a J.D. Edwards system, such as Accounts Receivable, Address Book, Inventory, and so on.
	If an object is used by more than one system, select a common system code. Use 00 for an object that is used by General Accounting, Address Book, and Inventory.
	See UDC 98/SY
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 form. 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.

What You Should Know About

Defining user defined codes as valid values for a data type

You can set up your system to verify the values that you enter on supplemental data forms against the values that you set up in user defined code tables. Use the following guidelines to define user defined codes as valid values for a data type:

- You must set up the user defined code table 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 specification data type does not relate to an existing user defined code or generic message code, you can set up a new user defined code table. J.D. Edwards recommends that you define the new tables for install systems 55 through 59. User defined code tables you that create for these systems will not be modified during any reinstall processes.

Processing Options for Define Your Own Data Types

```
DEFAULT OPTION:
1. Enter the Work Order Data Base to          _____
   default on the screen.  Leave blank
   to default Data Base "E" (Engineering
   Change Orders).
```

Setting Up Record Types for Work Orders

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Define Record Type Titles

You use record types to organize the additional textual information that you track for work orders. For example, you can organize information, such as meter access information, non-premise information, and so on. Record types function similarly to supplemental data types. You can use either or both of these features to store and track miscellaneous work order information. Record types are especially useful when you want to include a specific type of additional information directly on the Work Order Entry form. A processing option allows you to choose a particular record type that displays on this form.

You need to set up formats for work order record types. The format that you set up determines how the system displays the information. For each record type that you use, you can specify a text format or a format that includes text and three columns. The columnar format is particularly useful to organize and track more than one type of information within a record type. For example, you can set up a record type for tools required and choose a three-column format as a checklist for whether a total is needed for:

- Job preparation
- Performing the task
- Clean-up

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

Before You Begin

❑ Set up work order record type codes (48/RT). See *Setting Up User Defined Codes for Work Management* for more information about these codes.

▶ **To set up record types for work orders**

On Define Record Type Titles
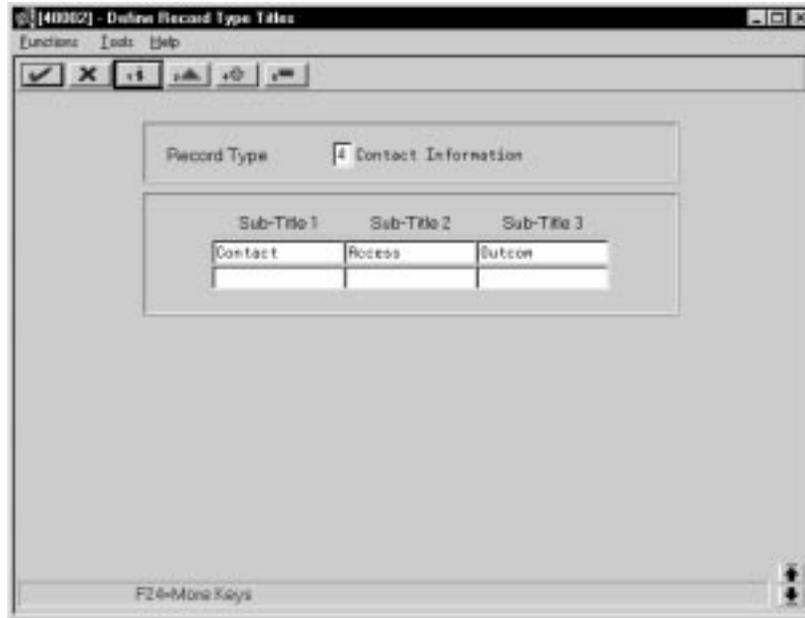
1. Complete the following field:

    • Record Type

2. Complete the following fields to define the text to appear beneath the column headings:

    • 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 form for the record type indicated.

Creating Model Work Orders

From Utility Customer Information System (G19), choose Work Orders

From Work Orders (G1913), choose Work Order Entry

You must create the model work orders that you will associate with specific investigation codes. When you create an actual work order and enter an investigation code, the system searches for the model work order associated with the investigation code and provides several default values, based on the model. Model work orders save data entry time and help to insure that consistent procedures are followed for specific types of work orders.

You should create model work orders so that they are not scheduled. You can do this through work order activity rules.

See Also

- *Setting Up Investigation Codes (P1991)*
- *Setting Up Work Order Activity Rules (P48269)* for information about work order statuses
- *Creating a Basic Work Order (P4819)* for the processing options for Work Order Entry

▶   **To create model work orders**

On Work Order Entry
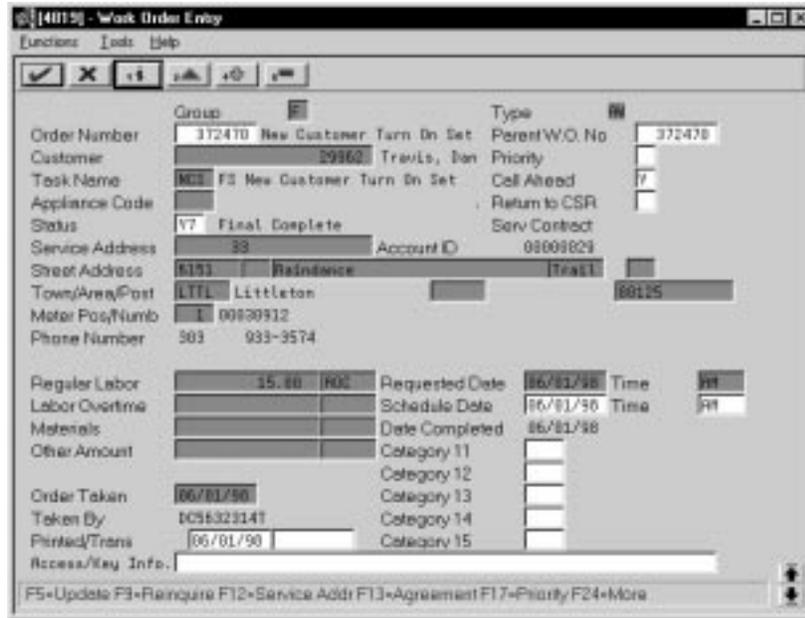
1. Create a work order.

    See *Creating a Basic Work Order.*

2. Complete the following field with a value that is valid for a model work order:

    •   Group

Field	Explanation
Group	The most fundamental division of work for a work order. For example, a utility might define two types of work for meters: field service and operations. This field is used in conjunction with the order document type of a work order to define work order activity rules, edits, and behaviors.
Status	A user defined code (system 00, type SS) that describes the status of a work order.

What You Should Know About

Locating model work orders

You can set up a work group code (00/TY) to represent model work orders. When you set up such a code, you can locate model work orders on Work Order Workbench.

See *Setting Up User Defined Codes for Work Management*.

Excluding unique work order information

When you create work orders that will be used as models, you should not complete fields that will likely be unique to each work order (with the exception of the Town Code field). For example, you should not complete fields such as those related to service address, scheduling, and so on.

Setting Up Investigation Codes

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Investigation Code Entry

You can set up investigation codes to provide the system with default values for work order entry based on different combinations of appliance codes and task names. In addition, you can specify a model work order which the system uses when it generates a work order based on a particular investigation code. Thus, when you create a work order using a customer snapshot, the only fields you must enter are investigation code fields. As a result, you save time and reduce the possibility of errors.

When you set up investigation codes, you specify an appliance code and a task name, as well as the values that you want to apply to the combination. For example, if you set up an investigation code for the combination of Appliance Code D (Dryer) and Task Name 129 (Appliance Repair), you can specify that the system provide specific default values for that combination, such as:

- Document type
- Work Group
- Schedule Group
- Bill Items

▶ **To set up investigation codes**

On Investigation Code Entry

1. Complete the following fields:

   - Task Name

   - Appliance Code

   - Order Type

   - Work Group

   - Model WO Number (Model Work Order Number)

   - Schedule Group

   - Schedule Type

2. Complete the following optional fields:

   - Description

   - Labor Bill Item

   - Labor OT Bill Item (Labor Overtime Bill Item)

   - Material Bill Item

   - Other Bill Item

Field	Explanation
Task Name	A user defined code (19/TN) that defines the actions that represent the nature of the work being performed, such as meter set, appliance repair, and so on.
Appliance Code	A code that designates a type of appliance, such as refrigerator, gas stove, electric furnace, and so on.
Order Type	A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. J.D. Edwards 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.) The following document types are defined by J.D. Edwards and should not be changed: 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
Model WO Number	The number that identifies an original document. This can be a work order, a voucher, an invoice, unapplied cash, a journal entry number, and so on. . . . . *Form-specific information* . . . . The work order number of the model work order.
Schedule Group	A code that indicates the level of division of work below a work group for a work order. A value is assigned to each investigation code and used in conjunction with the work group, town code, and meter route to determine the appropriate work center in the Work Center Cross Reference table.
Schedule Type	This field is used to determine how the work order schould be scheduled. R Regular Scheduling P Priority Scheduling D Delayed Scheduling
Labor Bill Item	A line item charge for utility use, such as consumption, customer charge, or work order charge. The Bill Item carries derivation rules for the calculation of the charge as well as accounting rules for how the charge will be reflected in terms of Accounts Receivable and Revenue.

Field	Explanation
Labor OT Bill Item	The bill item to be used when billing for overtime related to labor on a work order. The bill item represents a flat charge for the labor. Bill items are defined through the Bill Item Master (P1920).
Materials Bill Item	The bill item to be used when billing for materials on a work order. The bill item represents a flat charge for materials. Bill items are defined through the Bill Item Master (P1920).
Other Bill Item	The bill item to be used when billing for miscellaneous charges on a work order other than labor or materials. The bill item represents a flat charge for such an amount. Bill items are defined through the Bill Item Master program (P1920).

What You Should Know About

Model work orders for investigation codes	When you choose field sensitive help for the Model Work Order Number field, the system displays the Work Order Workbench to facilitate searching for model orders.

Processing Options for Investigation Code Entry

```
1. Enter the version of Work Order              _____
   Workbench.   (Default will be
   'ZJDE0001')
```

Setting Up the Work Order Status Flow

You must set up a variety of rules that govern how the system processes work orders as they progress through the work order status flow. For example, you must set up rules that specify what statuses (steps) a work order must go through, such as Entered, Accepted, Scheduled, and so on.

The following table describes the setup features of the work order status flow:

Work order activity rules	The flow of allowed status codes for different types of orders, as well as rules that are in effect, such as:
	• Whether to print the order at a particular status • Whether to lock the order at a particular status • Whether to schedule the order at a particular status
Work order edit rules	The conditions that must be met before a work order can reach a particular status
Work order behaviors	The actions that the system takes when a work order reaches a particular status

Setting up the work order status flow includes:

❑ Setting up work order activity rules

❑ Setting up work order edit rules

❑ Setting up work order behaviors

❑ Reviewing edits and behaviors by order type

❑ Reviewing edits and behaviors in use

Setting Up Work Order Activity Rules

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Work Order Activity Rules

You can set up work order activity rules that differ by work order document type and work group. Document types are user defined codes that you use to specify the nature of the work. For example, you might define separate document types for appliance repair work orders and meter exchange work orders. A work group is a user defined code that you can use to classify general labor pools, such as field service, engineering, and so on. Use work order activity rules to:

- Define the allowable statuses for a type of order and the sequences through which those statuses can be assigned

- Specify whether the work order can have costs posted against it at a particular status

- Determine whether a work order can be changed at a particular status

- Print a work order at a particular status

- Schedule a work order at a particular status

▶ **To set up work order activity rules**

On Work Order Activity Rules

1. To locate a classification of work orders, complete the following fields:

   - Order Type

   - Work Group

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)

3. Access the detail area.
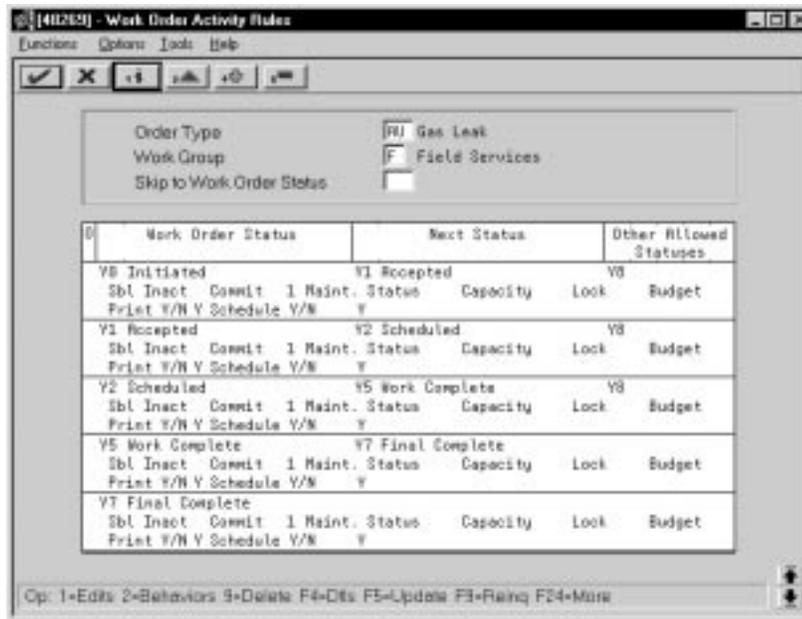
4. Complete the following optional fields:

- Print
- Schedule
- Subledger Inactive
- Commit
- Maintenance Status
- Capacity
- Lock
- Budget

Field	Explanation
Next Status	The next status for a work order, according to the work order activity rules, as the work order flows through the chain of approval.
	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.

Field	Explanation
Other Allowed	This is an optional field that indicates a status that can be performed as the next step in the order process. Although this is not the preferred or expected next step, this field is an allowed override. The system does not allow you to initiate an order line step or status not defined as either the expected next status or an allowed status. Other allowed status codes let you bypass processing steps. In processing options, these codes are often referred to as override next status codes.
	You must define a status code as a work order status in the Work Order Activity Rules table before you can use it as a next status or another allowed status.
Print Y/N	An indication of whether to print the work order when it reaches a particular status.
Schedule Y/N	An indication of whether to schedule a work order when it reaches a particular status.
Sbl Inact	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.
	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.
Commit	A code that determines whether inventory is committed when the status of a work order changes. Values are: 1 Inventory is not committed. 2 Inventory is committed.
Maint. Status	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.
	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.

Field	Explanation
Capacity	The capacity flag determines whether the system runs the capacity plan generation when a work order changes status.
	Values are:
	Blank Do not run the capacity plan generation.
	1 Run the capacity plan generation.
	2 Run the capacity plan generation and provide a warning message when labor resources are over capacity.
	The warning message appears on the work order header and on Backlog Management when you inquire on the work order.
Lock	A code that determines whether a work order can be changed at a particular status. The lock applies to records in the Work Order Master table (F4801), the Service Order Extension table (F4819), and the Work Order Instruction table (F4802). Valid values are:
	blank Do not lock the work order.
	1 Lock the work order.
	2 Lock the work order with a completion date.
	3 Do not lock the work order with a completion date.
Budget	Indicates whether the approver has budget approval authority. If so, the system does the following after approval:
	• Releases budget holds on the approved lines of the order
	• Updates the PA ledger for each line released

What You Should Know About

Deleting status codes   You should not delete a status code in the following situation. Another row of activity rules uses it as a next status or other allowed status elsewhere on the activity rules table for that order type and work group.

Setting Up Work Order Edit Rules
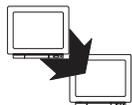
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Edit Rule Maintenance

You can set up edit rules for a work order based on a combination of order type (document type), work group, and status. Edit rules govern what information or action must be present before the work order can advance to the next allowed status. For example, you can set up an edit rule for meter turn-on work orders that requires a turn-on meter reading that bears the work order number before the order can reach completion status.

In addition, you can specify that the system provide the user with a hard or soft error if required information or actions have not been completed at the time the user attempts to revise the status of a work order. If you specify a hard error, the system prevents the user from revising the status of a work order until the error has been resolved. If you specify a soft error, the system provides a warning, but allows the user to ignore the warning and proceed with the desired status change.

▶ **To set up work order edit rules**

On Edit Rule Maintenance
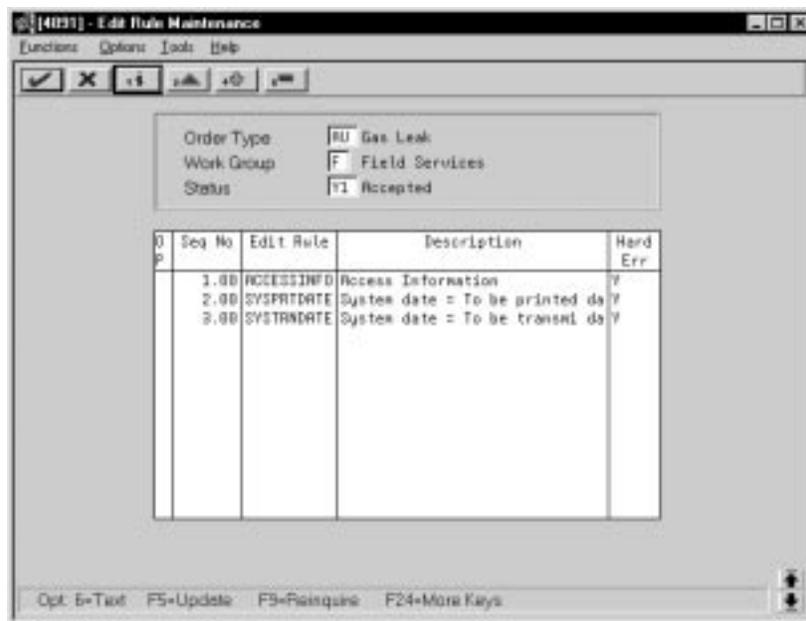
1. Complete the following fields:

    • Order Type

    • Work Group

    • Status

2. Complete the following fields for each edit rule that you want to establish:

    • Edit Rule

    • Hard Error

Field	Explanation
Edit Rule	A code that defines the edits, or conditions, that must be met before the system allows a work order to progress to a particular status. Edit rules are user defined codes (48/ER). You can use them individually or in groups to define a set of conditions that must be met before the system allows a work order to progress to a particular status. For example, for a meter exchange order, you can specify that before the order can progress from the status of Y1 (Accepted), there must be a meter number at the meter position (edit rule MTR#REQ), there must be a schedule date (edit rule SCHEDDATE), and the service address must exist (edit rule SRVADDREQ).
Hard Err	A flag that determines whether the system issues a hard error or a soft error if the edit rule fails. If you select a hard issue, the user will not be able to advance past the point that they are in their process until the error is fixed. If a soft error is issued, the error merely serves as a warning and the user will be allowed to continue. Values are: N Issue a soft error if the edit rule fails. Y Issue a hard error if the edit rule fails. You can use zero for N and 1 for Y.

Setting Up Work Order Behaviors

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Behavior Maintenance

You can set up behavior rules for a work order, based on a combination of order type (document type), work group, and status. Behavior rules govern what actions the system performs when a work order reaches a particular status. For example, you can specify that when a meter exchange work order reaches completion status, the system displays the Meter Exchange window to allow the user to enter the necessary meter readings.

▶ **To set up work order behavior rules**

On Behavior Maintenance
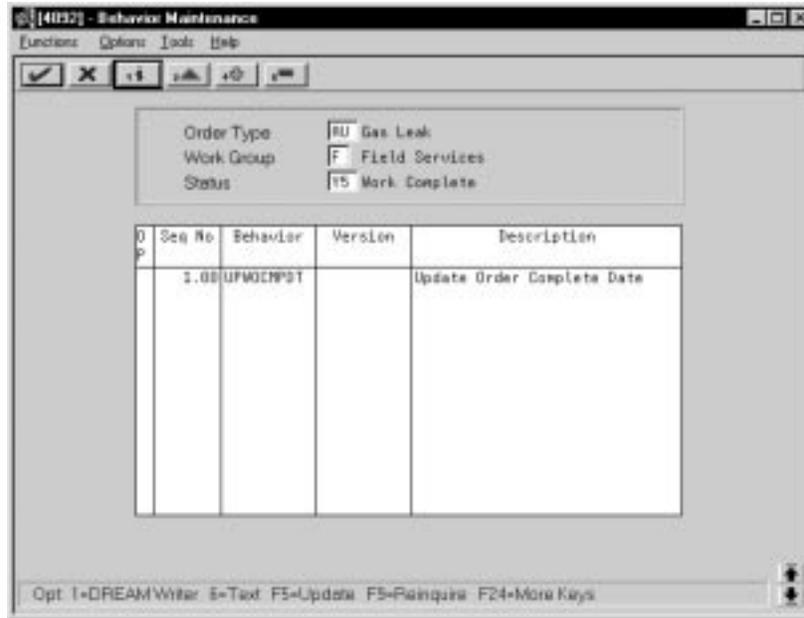
1. Complete the following fields:

   • Order Type

   • Work Group

   • Status

2. Complete the following field for each edit rule that you want to establish:

   • Behavior

3. Access the field help for the Version field next to each behavior that you enter.

   If a DREAM Writer version exists for that behavior, the system displays a DREAM Writer versions list window. If no versions are displayed, do not enter one.

4. Choose a DREAM Writer version, if applicable.

Field	Explanation
Behavior	A code used to define the actions that the system will take when a work order reaches a particular status. Behavior codes are user defined codes (19/BH). For example, when you change the status of an appliance repair work order to complete, you can specify that the system write special charges to the Special Charge table.

Reviewing Edits and Behaviors by Order Type
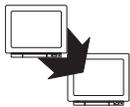
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Investigation Code Inquiry

You can verify that both edits and behaviors are set up as intended for a particular order type.

▶ **To review edits and behaviors by order type**

On Investigation Code Inquiry

1. To locate the investigation code, complete one of the following fields:

    - Task Name

    - Appliance Code

    - Order Type

    - Work Group

2. Next to the investigation code, choose the Edits/Behaviors by Order Type option.

Reviewing Edits and Behaviors in Use

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Edits/Behaviors in Use

You can determine how widely an edit or behavior is used in the system and review the types of orders to which an edit or behavior is applied.

▶ **To review edits and behaviors in use**

On Edits/Behaviors in Use

1. To review edit rules, complete the following field:
   - Edit Rule
2. To review behavior rules, complete the following field:
   - Behavior Code

Setting Up Print Formats for Work Orders

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Work Order Print Format

You can customize the printed version of work orders by setting up print formats for work orders. Print formats control the types of information that the system prints on work orders as well as the sequence in which the information appears. You set up one format group for each combination of work order type and work group. For example, you can specify that for an appliance repair work order that is to be completed by a field service representative, the following types of information appear on the order in the most meaningful and useful sequence:

- Related company equipment
- Load detail information
- Service address and customer information
- Service agreement information
- Service history information
- Priority information

▶ **To set up print formats for work orders**

On Work Order Print Format

1. For each print format that you want to set up, complete the following fields:

   - Order Type
   - Type

2. Complete the following fields:

   - Format
   - Sequence

Field	Explanation
Format	A code used to define and control the printing of specific information on customized printed versions of work orders. These codes are user defined (48/WP) and are combined together through the Work Order Print Format program (P4896) to form custom print formats. For example, you can specify that for an appliance repair work order that is to be completed by a field service representative, the following types of information appear on the work order in the most meaningful and useful sequence: RC Related company equipment LD Load detail information AC Service address and customer information SA Service agreement information HS Service history information PI Priority information Format codes and their meanings are hard-coded. Programming changes are required to add new format codes or to revise the printed layout of an existing format code.
Seq	The order in which child business units appear when listed under their parent. If you leave this field blank when you set up the organization structure, the system assigns the sequence number. . . . . *Form-specific information* . . . . This is the sequence in which the particular format code will print.

Setting Up Print Control for Work Orders

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Work Order Print Control

You can specify that the system print work orders to specific print queues, based on the work center responsible for the work order. You do so by setting up work order print control.

▶ **To set up print control for work orders**

On Work Order Print Control

1. Complete the following fields for each work center that you want to set up:

   • Business Unit

   • Print Queue

2. Complete the following optional fields:

- Print Flag
- Transmit Flag
- Print Leadtime Days
- Transmit Leadtime Days

Field	Explanation
Business Unit	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.
	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.
	Security for this field can prevent you from locating business units for which you have no authority.
	Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.
	. . . . *Form-specific information* . . . .
	The scheduled work center on the work order.
Print Queue	A designation of a specific print queue, such as QPRINT.
	If left blank, this field defaults to the print queue specified in your user profile.
Print Flag	A control flag that determines whether the work order should be printed. The utility print control facility for work orders uses this flag.
Transmit Flag	A flag that can be used by an external system, such as a dispatching system, to determine whether the work order should be transmitted.
Print Leadtime Days	This is the number of calendar days prior to the scheduled date on which work orders should print.
Transmit Leadtime Days	This is the number of calendar days prior to scheduled date that a work order should be transmitted to an external system. This field is informational only

Setting Up Monitoring Rules for Work Orders

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Setup

From Work Order Setup (G1943), choose Monitoring WO Types and Times

When you create a work order to resolve an emergency, you identify the work order as a priority order and attach monitoring rules that determine how the work order is handled. Monitoring rules help to ensure that action is taken to resolve the emergency within time constraints that you specify.

You set up work order monitoring rules that control when and to which user the system sends a break message concerning a priority work order. A break message is one that appears on a user's monitor, regardless of the program that is used. Depending on how you set up work order monitoring rules, the system monitors the work order status and sends periodic break messages to responsible personnel until its status change.

For example, you can specify that a certain user receive a break message one minute after a priority work order is initially entered. If no one changes the status of the order within the amount of time you specify, you can specify that the message be sent again.

See Also

- *Understanding the Work Order Cycle* for more information about changing the status of work orders

▶ **To set up monitoring rules for work orders**

On Monitoring Work Order Types and Times
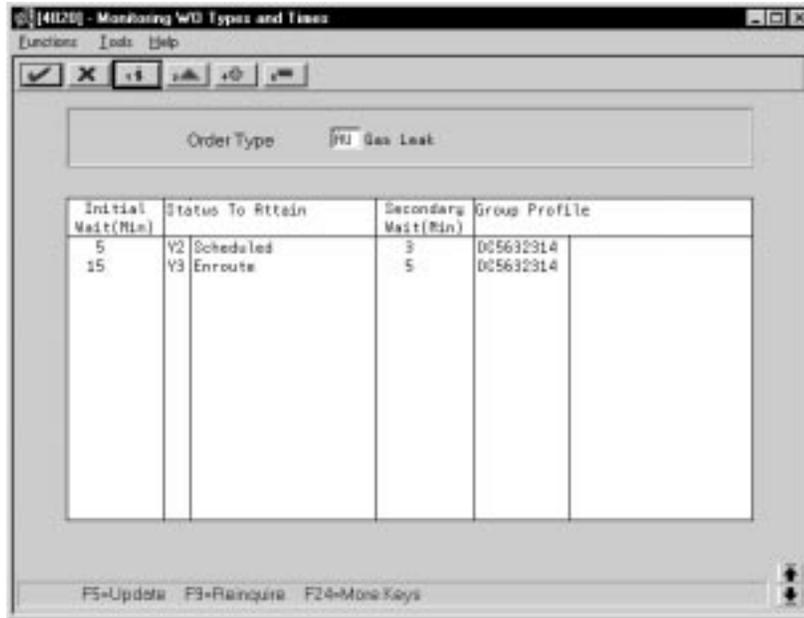
1. To locate the monitoring rules for a particular type of order, complete the following field:

   • Order Type

2. For each status at which the system should send break messages, complete the following fields:

   • Initial Wait

   • Status To Attain

   • Secondary Wait

   • Group Profile

Field	Explanation
Initial Wait(Min)	This is used by the Priority Monitoring system to measure how long the system should wait, in minutes, before sending a break message. The time period is measured from the time a work order is entered until it reaches the desired status.
Secondary Wait(Min)	This is used by the Priority Monitoring system to measure how long the system should wait, in minutes, after sending a break message before sending another.

Field	Explanation
Group Profile	For World, The IBM-defined user profile.
	For OneWorld, the creator of the version.

Setting Up Work Center Scheduling

Before you can use the scheduling features in UCIS, you must provide the system with information regarding your labor resources. For example, you must set up work centers (branches), and establish the crew size and efficiency for each work center. In addition, you must define which days are work days and how you want the work day to be divided in order to best utilize the available resources.

Setting up work order scheduling includes the following tasks:

- ❏ Setting up work centers

- ❏ Setting up work center cross-reference

- ❏ Setting up the workday calendar

- ❏ Setting up daily work hours

- ❏ Generating resource units

- ❏ Revising Resource Units

- ❏ Defining the time slot sequence

- ❏ Setting up time slot allocations by day

- ❏ Allocating resources to workday time slots

Setting Up Work Centers

You must provide the system with the following types of information about each work center that will be responsible for completing work orders:

- 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

In addition, you must set up alternate work centers that the system uses to schedule work orders when the primary work center has no available capacity.

Complete the following tasks:

❑ Set up branch planning constants

❑ Set up primary work centers

❑ Set up alternate work centers

Setting Up Branch Planning Constants
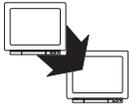
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose General Planning Constants

You must define material and resource planning values for each branch or plant that will later be used in association with a work center. 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 branch planning constants**

On General Planning Constants

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	The number of work hours that the manufacturing plant operates per day.
	. . . . *Form-specific information* . . . .
	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.
	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.

Field	Explanation
Hard/Soft Commit	Determines how the Shop Floor Control system commits inventory. Valid codes are: 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. 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. NOTE: When you set the Commitment Method field in the Branch/Plant Constants form to 2 or 3, you must use 1 or 2 for this field because a hard commitment must be performed.
Log Bill of Material Changes	This field determines whether changes to the bill of material are recorded in the Bill of Material Change table (F3011). Valid values are: Y Yes, log changes. N No, do not log changes. Blank will assume an N. When you log bill of material changes, the system saves the old bill of material and the new changed bill of material.
On–Line BOM Validation (Y/N)	Determines whether the system performs an online component/parent validation and low-level code assignment when you revise a bill of material. Valid values are: Y Yes, validate items online. N No, do not validate items online. Note: J.D. Edwards recommends that you validate items online (enter Y) unless your bills of material are extremely large. 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).

What You Should Know About

Shared constants with manufacturing systems   UCIS 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.

Setting Up Primary Work Centers

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Work Center Revisions

You must provide the system with the following types of information about each work center that will be responsible for completing work orders:

- 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

▶   **To set up primary work centers**

On Work Center Revisions

1. Complete the following fields:

   - Work Center

   - Dispatch Group

   - Branch

   - Crew Size

   - Number of Employees

   - Efficiency

   - Utilization

2. Enter an L in the following field:

   - Prime Load Code

Field	Explanation
Dispatch Group	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.
Branch	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: • Branch/Plant (MMCU) • Dept A (MCU) • Dept B (MCU) • Job 123 (MCU) Business unit security is based on the higher-level business unit.
Crew Size	The number of people who work in the specified work center or routing operation. The system multiplies the Run Labor value in the Routing Master table (F3003) by crew size during costing to generate total labor dollars. 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. . . . . *Form-specific information* . . . . For Shop Floor Control: If you leave the Hours field on the Routing Revisions form blank, the system uses the value entered in this field for leadtime and scheduling calculations.

Field	Explanation
Number of Employees	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.
Efficiency	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.
	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).
	Enter percents as whole numbers, for example, enter 80% as 80.00.
Utilization	A percentage that indicates how intensively a work center is being used. This value usually refers to machine use. It is the ratio of the direct time charged for production activities to the planned hours. This value is also used to calculate rated capacity.
	Enter percents as whole numbers, for example, enter 80% as 80.00.
Prime Load Code	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.
	Valid codes are:
	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)

Setting Up Alternate Work Centers

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Alternate Work Centers

You must set up alternate work centers that the system uses to schedule work orders when the primary work center has no available capacity.

▶ **To set up alternate work centers**

On Alternate Work Centers

1. Complete the following field:
   - Work Center

2. Complete the following fields for each work center that you want to identify as an alternate work center:
   - Alternate Work Center
   - Search Sequence

Field	Explanation
Work Center	The group of field personnel assigned to perform a work order. This group is supplied by the Work Center Cross Reference table when you create the order. You can change it as needed to reassign the order to another group.

What You Should Know About

Reviewing primary work centers — You can review all of the primary work centers to which a work center has been identified as an alternate. Enter a 1 in the Alternates field.

Setting Up Work Center Cross-References
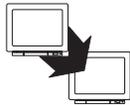
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Work Center Cross Reference

You set up work center cross-references to provide the system with instructions that it uses to schedule work orders to work centers. Specifically, the system assigns work orders to work centers based on the type of work order and the location of the work.

When you schedule a work order, the system searches from the most specific to the least specific cross-references information to identify the correct work center to which it assigns the work order. You can set up work center cross-references based on combinations of the following types of information:

Work group (work order type) — The system assigns a work order to a work center based on the work group. The work group is determined by the investigation code (the combination of task name and appliance code) that you enter on the work order.

Schedule group — The system assigns a work order to a work center based on the schedule group. The schedule group is determined by the investigation code (the combination of task name and appliance code) that you enter on the work order.

Town code — The system assigns a work order to a work center based on the town code that you enter on the work order or based on the service address on the work order.

Meter route — The system assigns a work order to a work center based on the meter route. The meter route is derived from the meter position that you enter on the work order.

When you create a work order, the system searches the Work Center Cross Reference table (F4872) for information that matches information from the work order before attempting to schedule the order. Refer to the following search sequence information to determine appropriate combinations for work center cross reference:

Step 1   The system searches for:

- Work group
- Schedule group
- Town code
- Meter route

If the system does not locate a work center for which this combination has been set up, it proceeds to step 2.

Step 2   The system searches for:

- Work group
- Schedule group
- Town code

If the system does not locate a work center for which this combination has been set up, it proceeds to step 3.

Step 3   The system searches for:

- Work group
- Schedule group

If the system does not locate a work center for which this combination has been set up, it proceeds to step 4.

Step 4   The system searches for:

- Work group

If the system does not locate a work center for which only a work group has been set up, it proceeds to step 5.

Step 5   You can set up a work center to which work orders with no cross reference information are assigned by leaving all four search fields blank. The system uses this work center as a default work center if the system fails to locate a work center with other search sequence information.

▶ **To set up work center cross-references**

On Work Center Cross Reference

1. To limit your search, complete any combination of the following fields:

   - Work Group
   - Schedule Group
   - Town Code
   - Meter Route
   - Work Center

2. Complete the following field in the detail portion of the form:

   - Work Center

3. Complete the following optional fields in the detail portion of the form:

   - Meter Route
   - Town Code
   - Schedule Group
   - Work Group

Field	Explanation
Meter Route	A code that indicates the specific route to which a meter belongs. This is for the purpose of reading meters in a logical sequential pattern in order to obtain consumption information.
Town Code	A user defined code (19/TC) that identifies the town or city in which a service address is located. This code is used to expedite searches for service addresses, and it plays a role in determining the work center when you are scheduling work order for a service address.

Setting Up the Workday Calendar
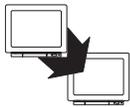
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Work Day Calendar

You must set up workday calendars for each work center that is responsible for the completion of work orders. 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 schedule labor resources. The system uses information from the workday calendar to plan and schedule labor resources, based on the workdays you specify. You should set up calendars as far in advance as you are willing to commit that work will be performed.

When you initially set up a workday calendar, the system 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. Typically, in a public utility setting, you specify all days, including Saturdays and Sundays as workdays.

In addition to setting up workday calendars for all work centers, you must also set up an override calendar that reflects the difference between typical day-to-day scheduling and days for which you might have allocated resources to time slots differently from typical workdays.

Setting up the workday calendar includes the following tasks:

- Setting up the workday calendar by work center

- Setting up an override workday calendar

▶ To set up the workday calendar by work center

On Work Day Calendar

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. For each day that you perform service work in any capacity (potentially every day), enter a W in the following field:
   - Type of Day

Field	Explanation
Calendar Year	The calendar year.
Calendar Month	The calendar month.

Field	Explanation
Day – Type	A user defined code (00/TD) that indicates the type of day, that is, how work should be scheduled. Examples are: W Work Day E Weekend H Holiday M Maternity Leave L Leave of Absence With the exception of W, which is hard coded, you can use and revise these and add new codes.

▶ **To set up an override workday calendar**

On Work Day Calendar

1. Complete the following field with the work center you want to specify as an override work center:

   - 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. For each day that you perform service work in any capacity (potentially every day), complete the following field:

   - Type of Day

See Also

- *Setting Up Business Units* in the *General Accounting I Guide* for information about setting up an override business unit

Setting Up Daily Work Hours
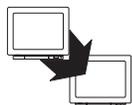
From Shop Floor Control Setup (G3141), choose Manufacturing Constants

You must specify the number of hours that are in a workday for each branch that is responsible for the completion of work orders. The system uses this information to determine the maximum workload for each work center.

▶ **To set up daily work hours**

On Manufacturing Constants
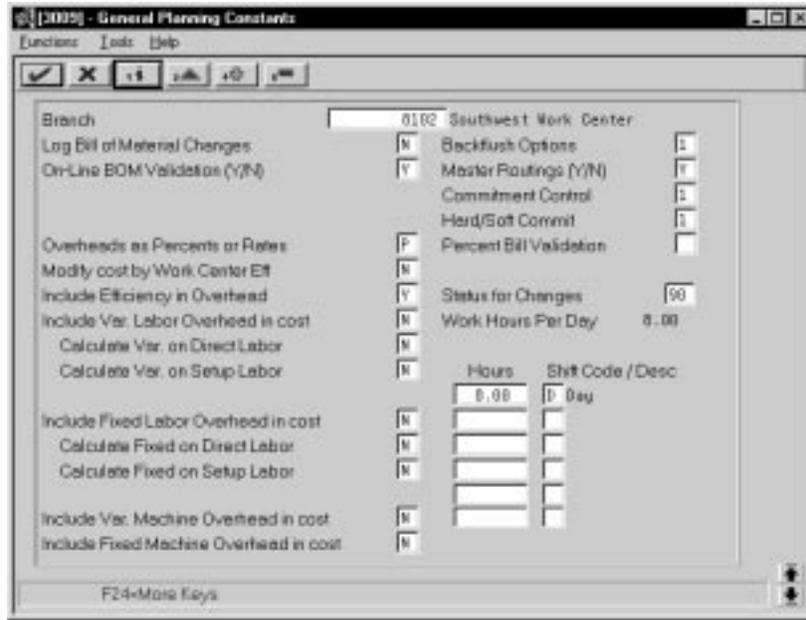
1. Complete the following field:

   • Branch

2. For each branch, complete the following field:

   • Work Hours Per Day

Field	Explanation
Hours – Work Hours Per Day	The number of work hours that the work center operates per day.
	. . . . *Form-specific information* . . . .
	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.
	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.

Generating Resource Units

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Resource Units Refresh

After you set up work centers 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 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 work centers, you must use a prime load code of L for labor hours. By using a prime load code of L, the system calculates resource units using the following information:

- Number of employees from Work Center Revisions
- Work hours per day from Manufacturing Constants

When you run the Refresh Resource Units program, the system determines a work center's capacity per day, in preparation for the capacity to be divided among time slots during the day.

See Also

- *Dividing the Work Day (P48722)*
- *Technical Foundation Guide* for more information about running, copying, and changing a DREAM Writer version

Revising Resource Units
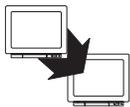
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Resource Units

You can revise resource units that you generated for a work center to correct over-capacity and under-capacity conditions. Use Resource Units to make

short-term revisions to the work center responsible for the service 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**

On Resource Units
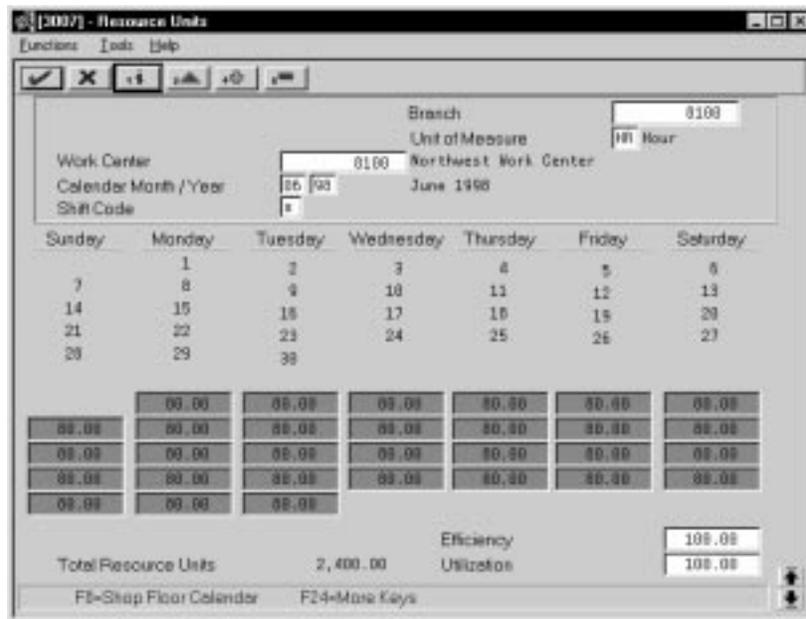
1. Complete the following fields:
    - Work Center
    - Calendar Month
    - Calendar Year
    - Branch

    The Branch field might already contain a default value.

2. 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.

3. Complete the following field to revise work center efficiency:

- Efficiency

Field	Explanation
Work Center	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.
	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.
	Security for this field can prevent you from locating business units for which you have no authority.
	Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.
	. . . . *Form-specific information* . . . .
	This value identifies the available capacity for the work center.
Calendar Month	The calendar month.
Year – Calendar Year	The calendar year.
Branch	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: • Branch/Plant (MMCU) • Dept A (MCU) • Dept B (MCU) • Job 123 (MCU)
	Business unit security is based on the higher-level business unit.
Unit – Resource 02	A value expressed in units, dollars, hours, floor space, and so on, that is used to calculate capacity.
	. . . . *Form-specific information* . . . .
	On this screen, the values are the total resource units allocated for this work center on this workday.

Field	Explanation
Efficiency	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.
	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).
	Enter percents as whole numbers, for example, enter 80% as 80.00.

What You Should Know About

Revising work days on the workday calendar	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. See *Setting Up the Workday Calendar*.
Adding long-term resources	When you need to make permanent or long-term resource revisions to a work center, use Resource Revisions. See *Setting Up Work Centers* for more information about adding resources to a work center.

Processing Options for Resource Units

```
DEFAULT PROCESSING:
  1. Unit of Measure                                    _____
```

Defining the Time Slot Sequence

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Time Slot Sequence

You can define the sequence that the system supplies available time slots on a particular day if the customer does not request a time slot for work to be done when you create a work order.

For example, assume you define the sequence as morning, afternoon, after 5 pm. When you create a work order and don't specify a time slot, the system determines whether the morning is completely scheduled on the requested date. If not, the system supplies morning as the time slot. If the morning is completely scheduled, the system determines whether the afternoon is completely scheduled, and so on.

▶ **To define the time slot sequence**

On Time Slot Sequence
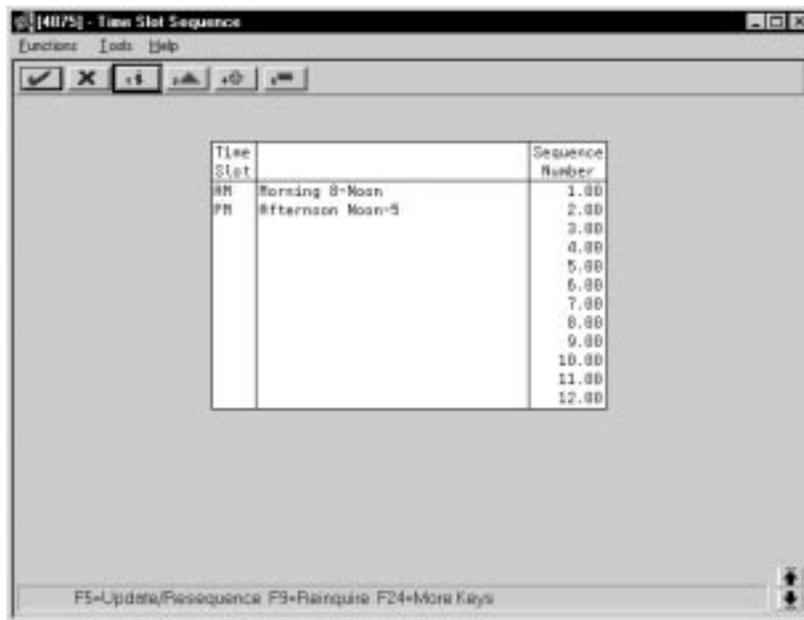
Complete the following fields:

- Time Slot
- Sequence Number

Field	Explanation
Time Slot	This field is used by UCIS to further define daily capacity and scheduled work orders. This field allows for groupings of capacity and load at smaller categories than one day.
Sequence Number	A sequence number within the tax file for future use.

Setting Up Time Slot Allocations by Day

From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Time Slot Allocations by Day

You can set up time slot allocations for each type of day. This is particularly useful if you need to schedule labor resources differently throughout the day. For example, a typical workload might require a higher percentage of your labor resources in the morning hours on weekdays, but a lower percentage of resources in the morning hours on weekends. You can allocate as many time slots per type of day as are useful for allocating and scheduling resources. Such allocation enables you to provide customers with a more accurate expectation regarding when work will be performed.

▶ **To set up time slot allocations by day**

On Time Slot Allocations by Day

Complete the following fields:

- Type of Day
- Time Slot
- Percentage of Capacity

You must enter a value for at least one time slot and percentage of capacity for each type of day you set up. If you enter values for multiple time slots, the values you enter in the Percentage of Capacity fields must total 100 percent.

Field	Explanation
Time Slot	This field is used by UCIS to further define daily capacity and scheduled work orders. This field allows for groupings of capacity and load at smaller categories than one day.
% of Capacity	This field is used to determine the percentages needed to allocate the resource capacity file (F3007) to the schedule pool file (F4873).

Allocating Resources to Workday Time Slots
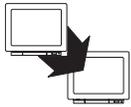
From Utility Customer Information System (G19), enter 29

From Utility CIS Setup (G194), choose Work Order Scheduling Setup

From Work Order Scheduling Setup (G19431), choose Allocate Capacity to Slots

When you divide the workday into smaller divisions or time slots, you must allocate labor resources (capacity) to the time slots you have defined. The system uses information from the override workday calendar and considers all days, including workdays, holidays, weekends, and so on, to allocate capacity to time slots.

Processing Options for Allocate Capacity to Slots

```
1. Enter the Override Calender Branch:                    _____
```

What You Should Know About Processing Options

Override Calendar (1)   The system uses type of day information from the override workday calendar to allocate capacity to time slots for each work center.

See *Setting Up the Workday Calendar* for more information on setting up an override workday calendar.

Appendices

Appendix A – Edits and Behaviors by Order Type

J.D. Edwards provides numerous predefined edit rules and behaviors, based on combinations of order type (work order document type) and work group. The following tables show examples of typical order type and work group combinations. You can use the following tables for quick reference to these predefined edit rules and behaviors. You can add, change, or delete edit rules to meet your business needs.

Order Type A6 – Appliance Repair

Work Group F – Field Services

Status	Edit Rule / Behavior	Description	Hard Edit
Initiated	None		
Accepted Edits	SRVAGREXST SRVADDREQ ACCESSINFO	Service agreement must exist Service address required Access information	Y Y Y
Scheduled Edits	SCHEDDATE	Must have a schedule date	Y
Work Complete Behaviors	UPWOCMPDT	Update order complete date	
Final Complete Behaviors	SPCCHGSWRT VIOLCSTPRF	Write special charges Write violations to profile	
Cancelled Behaviors	UPWOCMPDT	Update order complete date	

Order Type A8 – Meter Exchange

Work Group F – Field Services

Status	Edit Rule / Behavior	Description	Hard Edit
Initiated	None		
Accepted Edits	SRVADDREQ MTR#REQ	Service address required Meter number at position required	Y Y
Scheduled Edits	SCHEDDATE	Must have a schedule date	Y
Work Complete Behaviors	MTREXCHG MTRPOSINST UPWOCMPDT	Run meter exchange program Update meter position install Update order complete date	

Final Complete
    Edits . . . .
 	
    Behaviors . . . . .
	MTR#REQ
	MTRNEWINSD
	MTRREAD2
	MTRREAD3
	MTRRMVREAS
	SPCCHGSWRT
	VIOLCSTPRF
		Meter number at position required
		New meter install date required
		Meter read source of 2 required
		Meter read source of 3 required
		Meter remove reason code required
		Write special charges
		Write violations to profile
			Y
			Y
			Y
			Y
			Y

Cancelled
    Edits . . . .
    Behaviors . . . . .
	OPNPOCHK
	UPWOCMPDT
		Check for open purchase orders
		Update order complete date
			Y

Order Type A7 – Contract Inspection

Work Group F – Field Services

Status	Edit Rule / Behavior	Description	Hard Edit
Initiated	None		
Accepted Edits	SRVADDREQ	Service address required	Y
Scheduled Edits	ACCESSINFO SCHEDDATE SRVADDREQ SRVAGRACT SRVCNTRACT	Access information Must have a schedule date Service address required Active service agreement must exist Must have active service contract	Y Y Y Y Y
Work Complete Behaviors	UPWOCMPDT CNTRCUPD	Update order complete date Update contract with inspect date	
Final Complete Behaviors	SPCCHGSCLR	Clear special charges	
Cancelled Behaviors	UPWOCMPDT	Update order complete date	

Order Type A4 – Turn On Set

Work Group F – Field Services

Status	Edit Rule / Behavior	Description	Hard Edit
Initiated	None		
Accepted Edits	CAPACITYLE MTR#NO MTRPOS0 SRVADDREQ SRVAGREXST	Load capacity must be less or equal to value Must not have a meter number at position Active meter field of 0 required Service address required Service agreement must exist	Y Y Y Y Y
Scheduled Edits	SCHEDDATE	Must have a schedule date	Y
Work Complete Behaviors	UPWOCMPDT MTRPOSACT MTRPOSINST MTRSET SRVAGRACT	Update order complete date Change active meter flag Update meter position install Run meter position maintenance Activate service agreement	

Final Complete
    Edits . . . .
 	
    Behaviors . . . . .
	MTR#REQ
	MTRNEWINSD
	MTRPOS1
	MTRREADA
	SRVAGRACT
	CMPLACTIV
	SPCCHGSWRT
		Meter number at position required
		New meter install date required
		Active meter field of 1 required
		Meter read source of A required
		Active service agreement must exist
		Complete activation transaction
		Write special charges
			Y
			Y
			Y
			Y
			Y

Cancelled Behaviors	CNCLACTIV UPWOCMPDT	Cancel activation transaction Update order complete date	

Order Type AV – New Customer Turn On

Work Group F – Field Services

Status	Edit Rule / Behavior	Description	Hard Edit
Initiated	None		
Accepted Edits	MTR#REQ MTRPOS0 SRVADDREQ SRVAGREXST	Must have a meter number at position Active meter field of 0 required Service address required Service agreement must exist	Y Y Y Y
Scheduled Edits	SCHEDDATE	Must have a schedule date	Y
Work Complete Behaviors	UPWOCMPDT MTRPOSACT MTRREADING	Update order complete date Change active meter flag Run meter readings maintenance	

Final Complete
    Edits . . . .
 	
    Behaviors . . . . .
	MTR#REQ
	MTRNEWINSD
	MTRPOS1
	MTRREAD7
	SRVAGRACT
	CMPLACTIV
	SPCCHGSWRT
		Meter number at position required
		New meter install date required
		Active meter field of 1 required
		Meter reading source of 7 required
		Active service agreement must exist
		Complete activation transaction
		Write special charges
			Y
			Y
			Y
			Y
			Y

Cancelled Behaviors	UPWOCMPDT CNCLACTIV	Update order complete date Cancel activation transaction	

Order Type AZ – New Customer Readover – Turn Off

Work Group F – Field Services

Status	Edit Rule / Behavior	Description	Hard Edit
Initiated	None		
Accepted Edits	SRVADDREQ MTR#REQ MTRPOS1	Service address required Meter number at position required Active meter field of 1 required	Y Y Y
Scheduled Edits	SCHEDDATE	Must have a schedule date	Y
Work Complete Behaviors	MTRREADING TRNONRDGEN SERAGRDEAC SRVAGRACT UPWOCMPDT	Run meter readings maintenance Generate turn on read from turn off Deactivate service agreement Activate service agreement Update order complete date	

Final Complete
    Edits . . . .
 	
    Behaviors . . . . .
	MTR#REQ
	MTRPOS1
	SRVAGRACT
	CMPLACTIV
	OWNRNOTIFY
	SPCCHGSWRT
	VIOLCSTPRF
		Meter number at position required
		Active meter field of 1 required
		Activate service agreement
		Complete activation transaction
		Notify owner of turn off or cut off
		Wirte special charges
		Write violations to profile
			Y
			Y
			Y

Cancelled Behaviors	UPWOCMPDT CNCLACTIV	Update order complete date Cancel activation transaction	

Appendix B – Edit Rule and Behavior Tables

J. D. Edwards provides numerous predefined edit rules and behaviors that you can assign to statuses in the work order status flow. Use the following reference tables when you set up specific rules for your work orders. The tables show the abbreviation for each edit rule and behavior, as well as a description of what the edit requires or a description of the action the system takes when the behavior is in effect.

Edit Rules

Abbreviation	Description	Extended Description
ACCESSINFO	Access Information	Access information is stored as work order record type text (F4802). The record type that the system checks is determined by a processing option to Edit Rule Checker (X4891). If any data is entered under this record type for the order, the edit rule is satisfied.
CAPACITYGT	Load capacity must be greater than value	This indicates that the appliance code associated with the meter position should exceed an amount determined by a processing option to Edit Rule Checker (X4891). This generally determines which type of meter should be assigned to the work order. The sum of the capacities of all the load detail for a given service address and meter position are compared to the amount. If the sum is greater than the amount, the edit rule is satisfied.
CAPACITYLE	Load capacity must be less than or equal to value	This indicates that the appliance code associated with the meter position should not exceed an amount determined by a processing option to Edit Rule Checker (X4891). This generally dictates which type of meter should be assigned to the work order. The sum of the capacities of all the load detail for a given service address and meter position are compared to the amount. If the sum is less than or equal to the amount, the edit rule is satisfied. If the sum of the capacities of the load detail is equal to zero or if no load detail record exists, the edit rule fails.
COLLORMETR	Collection data or meter read	Data must exist in the Record Type Text table (F4802) as determined by a processing option or a meter read must exist for the work order in the Meter Readings table (F1930). If either of these are found, the edit rules are satisfied.

CUSTPHONE#	Customer phone number required	This indicates that the Customer Service Representative must have a phone number to reach the customer. Phone numbers can be found in the Address Book record (F0115) or the customer contact information that is stored as Work Order Record Type Text (F4802). The record type to check is determined by a processing option to Edit Rule Checker (X4891). If either of these has data, the edit rule is satisfied.
LEAKCONF	Leak information required	This indicates that all leak information is required if a leak was confirmed. Leak information is stored in Work Order Supplemental Data (F48092). The Work Order Data Base and Data Type information is determined by a processing option to Edit Rule Checker (X4891). If the supplemental data record exists and all of the fields are entered, the edit rule is satisfied.
MTR#NO	Must not have a meter number at position	This indicates that there should not be a meter already in place at the particular meter position. If the Item Number field in the Meter Position table (F1905) is zero for the service address and meter position of the work order, the edit rule is satisfied,
MTR#REQ	Meter number at position required	This indicates that there should be a meter already in place at the particular meter position. If the Item Number field in the Meter Position table (F1905) is not zero for the service address and meter position of the work order, the edit rule is satisfied.
MTRNEWINSD	New meter install date required	This indicates that there should be an installed date for the particular meter position. If the Installed Date field in the Meter Position Table (F1905) is not zero for the service address and meter position of the work order, the edit rule is satisfied.
MTRPOS0	Active meter field of 0 required	This indicates that there should be an inactive meter for the particular meter position. If the Active Meter field in the Meter Position table (F1905) is 0 for the service address and meter position of the work order, the edit rule satisfied.
MTRPOS1	Active meter field of 1 required	This indicates that there should be an active meter for the particular meter position. If the Active Meter field in the Meter Position table (F1905) is 1 for the service address and meter position of the work order, the edit rule is satisfied.
MTRPOS2	Active meter field of 2 required	This indicates that there should be a meter turned off due to non-payment at the particular meter position. If the Active Meter field in the Meter Position table (F1905) is 2 for the service address and meter position of the work order, the edit rule is satisfied.
MTRPOS3	Active meter field of 3 required	This indicates that there should be a meter cut off for non-payment at the particular meter position. If the Active Meter field in the Meter Position table (F1905) is 3 for the service address and meter position of the work order, the edit rule is satisfied.

MTRPOS4	Active meter field of 4 required	This indicates that there should be a meter shut for new construction for the particular meter position. If the Active Meter field in the Meter Position table (F1905) is 4 for the service address and meter position of the work order, the edit rule is satisfied.
MTRREADA	Meter read source of A required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is A for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD0	Meter read source of 0 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 0 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD1	Meter read source of 1 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 1 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD2	Meter read source of 2 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 2 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD3	Meter read source of 3 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 3 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD4	Meter read source of 4 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is "4" for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD5	Meter read source of 5 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 5 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD6	Meter read source of 6 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 6 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD7	Meter read source of 7 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 7 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.

MTRREAD8	Meter read source of 8 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 8 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRREAD9	Meter read source of 9 required	If there is a record in the Meter Readings Table (F1930) whose meter reading source is 9 for the service address and meter position on the work order, and the reading carries the work order number, the edit rule is satisfied.
MTRRMVREAS	Meter remove reason required	This indicates that a remove reason code must be entered for the work order. This is accomplished by checking the Installed Meter History table (F1906) by work order number and checking the Meter Removal Reason code. If this field is not blank, the edit rule is satisfied.
OPNPOCHK	Check for open purchase orders	This is intended to prevent canceling work orders with open purchase orders. The system checks for open purchase orders by order number (Subledger) and subledger type of W. If there are no purchase orders with a line status less than 900, the edit rule is satisfied.
OWNCUTCHK	Check if cut off of service allowed	This checks whether the cut-off of service requires transfer to owner. If the connection being cut off is the owner connection, the edit rule passes. If the connection being cut off is for a tenant, the owner record is located. If no owner record is located, the edit rule passes. If the owner record is located, the cut-off servicing field is checked. If the cut-off servicing is 2 (transfer required), the edit rule fails. All other cut-off servicing values allow the edit rule to pass.
OWNTRNFCHK	Check if turn off allowed	This checks whether the turn-off of service requires transfer to owner. If the connection being turned off is the owner connection, the edit rule passes. If the connection being turned off is for a tenant, the owner record is located. If no owner record is located, the edit rule will pass. If the owner record is located, the turn-off servicing field is checked. If the turn-off servicing is 2 (transfer required), the edit rule fails. All other turn-off servicing values allow the edit rule to pass.
RMKMAND	Remark is mandatory	This indicates that the remark field for the status change must be entered. If the remark field is not blank, the edit rule will be considered satisfied. The remark field would have been entered on the status change window.
RTNFLGMAND	Return flag is mandatory	This indicates that the Return to Customer Service Representative Return To Flag is mandatory. If this field equals 1 or Y for the work order, the edit rule is satisfied.

SCHEDDATE	Must have a schedule date	This indicates that there should be a schedule date for the work order. If the schedule date field in the work order table is not zero for the work order, the edit rule is satisfied.
SCHEDDAYWA	Schedule date must be in advance	This indicates that the schedule date must be set to a date that is far enough in advance of the work order taken date to allow preliminary events to take place. A processing option to the Edit Rule program (X4891) determines the number of advancement days.
SRVADDREQ	Service address required	This indicates that there should be a service address associated with the work order. If the Service Address field in the work order table is not zero for the work order, the edit rule is satisfied.
SRVAGRACT	Active service agreement exist	This indicates that there should be an active service agreement associated with the work order. The date used for this edit is the Work Order End Date. If this is zero, the Work Order Schedule Date is used. If the effective date in the Service Agreement Connections table (F1903) is not zero and is less than or equal to the date being checked and the end effective date is all 9's (indicating no end date) OR if the date being checked is between the two dates (inclusive) of the service agreement, service address, and meter position in question, the edit rule is satisfied.
SRVAGREXST	Service agreement must exist	Any service agreement must exist (active or inactive) for the work order. If the service agreement field is not blank, the edit rule is satisfied.
SRVAGRINAC	Inactive service agreement exist	This indicates that there should be an inactive service agreement associated with the work order. The date to be checked for this edit is the Work Order End Date. If this is zero, the Work Order Schedule Date is used. If the end effective date is less than the date being checked for the service agreement, service address, and meter position in question OR if the beginning date is greater than the date being checked, the edit rule is satisfied.
SRVCNTRACT	Must have active service contract	This indicates that there should be an active service contract associated with the work order. The date to be used for this edit is the Work Order End Date. If this is zero, the Work Order Schedule Date is used. If the Effective Date in the Service Contract table (F1928) is not zero and less than or equal to the date being checked and the End Effective Date is zero OR if the date being checked is between the two dates (inclusive) of the service contract in question, the edit rule is satisfied.

SRVCNTRNO	Must not have active service contract	This indicates that there should be an inactive service contract associated with the work order. The date to be used for this edit is the Work Order End Date. If this is zero, the Work Order Schedule Date is used. If the End Effective Date is less than the date being checked and not zero for the service contract in question OR if the Begin Date is greater than the date being checked, the edit rule is satisfied.
STSTIMLMT	Time limit between status and remark	This indicates that the time gap between this status and the previous status for a work order should not exceed a time limit without a status change remark to justify the gap. The time limit is determined by a processing option to the Edit Rule Checker program (X4891). If the difference between the date and time stamp of the last status record for the work order and the date and time stamp entered on the Status Change window is greater than the allowable time gap in minutes, the remark field of the Status Change window must not be blank. If the remark field is not blank, the edit rule is satisfied.
SYSPRTDATE	System date = to be printed date	This indicates that the to be printed date of the work order must be less than or equal to the system date. If the date to be printed field on the Work Order Extension table is less than or equal to the system date, the edit rule is satisfied.
SYSTRNDATE	System date = to be transmitted date	This indicates that the to be transmitted date of the work order must be less than or equal to the system date. If the date to be transmitted field on the Work Order Extension table is less than or equal to the system date, the edit rule is satisfied.

Behaviors

Abbreviation	Description	Extended Description
BRKMSGSND	Send break message to dispatch	This sends system break message to particular user profile. The user profile to send the message to is determined by checking the Priority Monitoring table (F4820) for the Work Order Type (DCTO) / Status = ' '. The message to send is a concatenation of Task / Appliance / Service Address / Work Order Number, Date, Time / Priority Work Order Entered / Dispatch Group / Division. The program will be changed so that the behavior fails if no Monitor records (F4821) are written.
CMPLACTIV	Complete Activation Transfer	This behavior completes the service activation process by reading activation records from the Service Activation Transaction table (F19024) and performing the indicated updates to other UCIS tables. This behavior can update the Service Agreement (F1902), Service Connections (F1903), and Budget Billing (F1917) tables.

CNCLACTIV	Cancel Activation Transfer	This behavior is called when a user chooses to end the service activation process before it is completed. This behavior deletes all of the records created during the activation. It affects Service Agreement (F1902, F1903), Service Contract (F1928, F1929), Special Charges (F1918), Security Deposits (F1943), and Profile Information (F1950) tables.
CNTRCUPD	Update contract with inspection date	This updates Service Contract Master (F1928) Inspection Date (N8INDT) with the Work Order Completion Date (WASTRX). It also retrieves the Contract Detail table (F1929) by Contract Number (WASCON) / Appliance (WAAPLC) / Serial Number (WASERI) and updates its Inspection Date (INDT) with the Work Order Completion Date (STRX) and its Inspection Work Order Number (INWO) with the Work Order Number (WADOCO). If the Completion Date field is zero, the date from the status change window is used. If either table is not found (F1928 and F1929), the behavior fails.
CORRESP	Write Correspondence Records	This writes records to the Account/Document Repository table (F1955) and Document Merge table (F1965) containing information about the work order.
MTREXCHG	Run meter exchange program	This allows the user to enter the old meter read, the new meter number, and the new meter read for a particular service address and meter position. All of this data is written to the Meter Readings table (F1930). The Meter Exchange Window (P1906) is used to capture this information. Before calling the Meter Exchange Window, the Meter Readings table is checked to see if a reading has been recorded for the order already. If it has been captured, the window is not called. A processing option controls whether the exchange window is called in exchange mode (not 1) or remove mode (1). If the meter position is not found, the behavior fails.
MTRPOSACT	Change Active Meter Flag	This changes the Active Meter Flag (ACTM) of the meter position of the work order. This is accomplished by accessing the Meter Position table (F1905) by the Service Address (SAID) and Meter Position (MPOS) of the work order and setting the Active Meter Flag (ACTM) to a value determined by a processing option to this behavior. Also, the On/Off Date (CND) of the Meter Position is updated with the Work Order Complete Date (STRX). If the Complete Date is blank, the date from the status change window is used. If the Meter Position is not found, the behavior fails.

MTRPOSINST	Update Meter Position Install	If the Install Date is zero, this updates the Meter Position (F1905) Install Date (IND) with the WO Complete Date (STRX). This is accomplished by accessing the Meter Position table by the Service Address (SAID) and Meter Position (MPOS) of the work order. If the WO Complete Date is zero, the date from the status change window is used. If the meter position record is not found, the behavior fails.
MTRREADING	Run meter readings maintenance	This allows the user to enter the meter reading for a particular service address and meter position. This data will be written to the Meter Readings table (F1930). The Meter Readings program (P19301) is used to enter this information. Before calling the meter readings program, the meter readings table is checked to see if the meter reading information for the work order has been recorded. If it has, the program is not called. If the meter position is not found, the behavior fails.
MTRSET	Run meter position maintenance	This allows the user to enter meter position information for a particular service address and meter position. This data is written to the Meter Positions table (F1905). The Meter Positions Maintenance program (P19051) is used to enter this information. A processing option determines the meter reading source to be used if an initial reading is entered.
OWNRNOTIFY	Notify owner of turn / cut off	This behavior writes records to the Account/Document Repository (F1955) and Document Merge (F1965) tables in cases in which an owner requested correspondence notification for the following: • A tenant's service is turned off • A tenant's service is cut off • A tenant's service is transferred to the owner due to a pending turn-off or cut-off of that service
SERAGRDEAC	Deactivate Service Agreement	This deactivates a service agreement. A processing option determines which agreement to deactivate. If this is set to Y or 1, the agreement is retrieved from the turn off read (MRSR = 8) for the work order. If the meter read is not found, the behavior fails. If the relevant processing option is left blank, the agreement on the work order is used. The Service Agreement Connections table (F1903) is accessed by the Service Agreement Number (RORN) / Service Address (SAID) / Meter Position (MPOS), and the End Effective Date (EFTE) is set to the Work Order Complete Date (WASTRX) or Status Change Date (if STRX = 0). If the connections record is not found, the behavior fails. If there are no active connection records left, the Agreement Bill Next Flag (BLNX) is set to 5, and any active security deposits are applied. If the agreement is not found, the behavior fails.

SPCCHGSCLR	Clear Special Charges	This clears the special charge amounts (FLOV, FLMR, FOTR, FLRG) if there is a service contract (WASCON not equal to 0) for this work order.
SPCCHGSWRT	Write Special Charges	This writes records to the Special Charges table (F1918) using the Bill Items (WAITM, WALOBI, WAFMBI, WAFOBI) and the Bill Amounts (WABLRT, WAFLOV, WAFLMR, WAFOTR) of the work order. Each Bill Amount is checked and a Special Charge record is written for each non-zero amount.
SRVAGRACT	Activate Service Agreement	This updates the beginning and ending effective dates in the Service Agreement Connections table (F1903), clears the closed flag in the Service Agreement Master table (F1902), and assigns any available, paid service contracts to the agreement if they exist. The connection is found by using the agreement, service address, and meter position on the work order with a beginning effective date of 0. If found, the beginning date is set to the work order completion date (or the latest status change date if the order carries no completion date). The ending date is set to 999999, indicating an open connection. Then, the agreement's closed flag is cleared. if it contains a non-blank value. Finally, server X19281 is called to assign any free, fully paid service contracts to the agreement in case a prior customer left the premise before the contract expired. If the connection record or the agreement record is not found, the behavior fails.
SRVAGRDCUT	Deactivate or Cut Service Agreement	This deactivates a service agreement. The Service Agreement Connections table (F1903) is accessed by the Service Agreement Number (RORN) / Service Address (SAID) / Meter Position (MPOS), and the End Effective Date (EFTE) is set to the Work Order Complete Date (WASTRX) or Status Change Date (if STRX = 0). If the connections record is not found, the behavior fails. If there are no active connection records left, the Agreement Bill Next Flag (BLNX) is set to 5, the hold code is set to 2, and the release date is set ahead of the Work Order Complete date by a number of days set in the processing option. If the agreement is set for final billing, any open security deposits for the agreement are applied. If the agreement is not found, the behavior fails.

SRVAGRDEAC	Deactivate Service Agreement	This deactivates a service agreement. A processing option determines which agreement to deactivate. If the processing option is set to Y or 1, the agreement is retrieved from the turn-off reading (MRSR = 8) for the work order. If the meter reading is not found, the behavior fails. If the processing option is left blank, the agreement on the work order is used. The Service Agreement Connections table (F1903) is accessed by the Service Agreement Number (RORN) / Service Address (SAID) / Meter Position (MPOS), and the End Effective Date (EFTE) is set to the Work Order Complete Date (WASTRX) or Status Change Date (if STRX = 0). If the connections record is not found, the behavior fails. If there are no active connection records left, the Agreement Bill Next Flag (BLNX) is set to 5, and any active security deposits are applied. if the agreement is not found, the behavior fails.
SRVAGRRCUT	Reactivate or Cut Service Agreement	This reactivates a service agreement after it has been deactivated using program X19720. The Service Agreement Connections table (F1903) is accessed by the Service Agreement Number (RORN) / Service Address (SAID) / Meter Position (MPOS), and the End Effective Date (EFTE) is set to 999999. If the connections record is not found, the behavior fails. If the Agreement Bill Next Flag (BLNX) is set to 5, it is cleared. If the Hold Code is set to 2, it is cleared and the release date is cleared. If the agreement is not found (F1902), the behavior fails.
TRNONRDGEN	Generate Turn On Read from Turn Off Read	This generates a Turn On Read record in the Meter Readings table (F1930) by reading the turn-off reading for the work order. A turn-off reading is defined by an 8 in the meter reading source (MRSR) field. The turn-on read record has a 7 in the meter reading source field, and one second is added to the reading time. If a turn-off record is not found, the behavior fails.
UPWOCMPDT	Update Order Complete Date	This loads the complete date (STRX) of the work order with the date from the status change window. It also loads the last service date of the service contract if one applies to the work order.
VIOLCSTPRF	Write violations to customer profile	This writes violations to the Service Address Customer Profile record. Work Order Violations (F48092) are retrieved using the Work Order Database (WODB (a processing option)) / Type of Data (TYWO (a processing option)) / Work Order Number (DOCO). Records are written to the Profile Data Entries table (F1950). If the Type of Data (TYWO) is not found in the Profile Data Types table (F1952), the behavior fails.
WOPRT	Print Work Order	This submits the UCIS Work Order Print program (P19425).

Glossary

Glossary

This glossary defines terms in the context of your use of J.D. Edwards UCIS system and the accompanying user guide.

AAI. Automatic accounting instructions. A code that points to an account in the chart of accounts. AAIs define rules for programs that automatically generate journal entries. This includes interfaces between Accounts Payable, Accounts Receivable, and Financial Reporting and the General Accounting system. Each system that interfaces with the General Accounting system has AAIs. For example, AAIs can direct the General Ledger Post program to post a debit to a certain expense account and a credit to a certain accounts payable account.

account. See *service agreement*.

account ID. A set of numbers and letters that uniquely identifies a service agreement.

aggregation. The ability to combine the consumption of multiple meters and bill as if the combined consumption had been measured by a single meter.

batch. (1) An accumulation of data to be processed. (2) A group of records brought together to be processed or transmitted at the same time. (3) Pertaining to an activity that involves little or no user interaction.

batch job. See batch.

behavior. An action, such as a file update or program call, that the system performs when a work order is changed to a certain status.

bill item table. A set of charges that are billed regularly and together on an agreement, also known as a rate code or rate class.

category code. In user defined codes, a temporary title for an undefined category. For example, if you are adding a code that designates different sales regions, you could change category code 4 to Sales Region, and define E (East), W (West), N (North), and S (South) as the valid codes.

connection. A service address and meter position that reside on a service agreement.

customer. The person or persons responsible for paying the utility bill for an agreement. Customer information is stored int he Address Book.

detail area. An area of a form that displays additional information associated with the records or data items displayed on the form.

DREAM Writer. Data Record Extraction and Management Writer. A flexible data manipulator and cataloging tool. You use this tool to select and sequence the data that is to appear on a report.

edit. (1) To make changes by adding, changing, or removing information. (2) The program function of highlighting fields into which you have entered inadequate or incorrect data.

edit rule. A condition that must be met for a work order to be changed to a certain status.

fold area. See *detail area*.

item number. A unique identifier for an individual utility meter or other piece of the distribution network. A meter's serial number is often more familiar to the user and can be used in place of the item number.

job. A single identifiable set of processing actions you instruct the computer to perform. You start jobs by choosing menu selections, entering commands, or pressing designated function keys. An example of a computer job is payment printing in the Accounts Payable system.

meter route sequence number. A number that indicates the order in the meter route in which a meter is read.

parcel number. A unique name or identifier for a service address. Parcel numbers in the United States are typically assigned by federal or local assessors' offices.

premise. Information about a physical site of utility service delivery that can include the service address, meter positions, and load detail.

processing options. A feature that allows you to supply parameters to direct the functions of a program. For example, processing options allow you to specify defaults for certain form formats, control the format in which information is printed on reports, change the way a form displays information, and enter "as of" dates.

scheduling. The system function of finding a work center that has adequate staffing capacity to perform a work order in the desired time frame on a particular day.

service address. The physical location where utility services are delivered. This often corresponds to the street address of a customer, but it can also represent a non-residential point of delivery such as a fire hydrant. A service address can receive multiple utility services through multiple meters.

service agreement. A contract between a customer and a utility that outlines the terms under which service is delivered to the customer. A service agreement specifies a customer and service address. One bill is created for each service agreement during the billing process. A service agreement is also known as a customer account.

special charge. A charge that is billed to an agreement outside of the usual set of tariff charges. These are often one-time charges such as account opening charges, but they can also be recurring items such as service contract charges that are paid by installment.

weather area. A code used to distinguish various geographical areas for the purpose of entering average daily temperatures. Customer bills can be generated with weather information that is specific to the weather area in which the customer resides.

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