JD Edwards World

Change Management Guide

Release A9.4

E58788-01

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Describes tracking changes to a project through multiple revisions and approval stages. Integrates with the Subcontract Management and Contract Billing systems to link information in change requests to the relevant contract in either system.

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Preface

Welcome to the JD Edwards World Change Management Guide.

Audience

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

Documentation Accessibility

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Related Information

For additional information about JD Edwards World applications, features, content, and training, visit the JD Edwards World pages on the JD Edwards Resource Library located at:

http://learnjde.com

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Indicates cautionary information or terms defined in the glossary.
italic	Indicates book titles or emphasis.

1

Overview to Change Management

This chapter includes the following topics:

- Section 1.1, "Overview"
- Section 1.2, "System Integration"

1.1 Overview

JD Edwards World Change Management system allows you to track changes to a project through multiple revisions and approval stages. The Change Management system provides the following features:

- An approval process that allows you to move a change request through a series of approval stages. You do this by assigning user defined status codes to each line item of account distribution information. These status codes can have ledger types assigned to them, and hence control the update of account balances in various ledgers.

- The ability to create requotes, which provide an audit trail for multiple quotations and stages of approval outside the General Accounting and Job Cost systems. The system tracks changes by change request number.

- The ability to track changes by subledger detail.

- A document control feature that is shared with the Contract Billing and Subcontract Management systems.

- A search facility that supports a wide range of search criteria, such as job, type, and priority.

When you enter a change request, you assign user defined status codes to each line item of account distribution information. These status codes indicate where the line item is in the approval process. As you revise account distribution information for a line item, you can update the status codes to move the request through the approval process.

Status codes that represent stages in the approval process might have ledger types in the Job Cost system assigned to them and thus affect the Account Ledger (F0911) and Account Balances (F0902) tables. When you revise account distribution information, the system automatically updates the balances for the ledger types assigned to the status codes. When you change status codes, the system moves amounts and quantities from the old ledger type to the new ledger type, thus keeping the ledger types in balance. Status codes are defined in the Status Code Update Table.

At any time after a change request is created, you can enter information about related documents and activities, such as engineering drawings, submittals, and tasks that need to be performed.

The Change Management system is linked to the Subcontract Management and Contract Billing systems so that you can link information in the change request to the relevant contract in either system. Therefore, you need to enter information about a change request only in the Change Management system.

1.2 System Integration

The Change Management system serves as a focal point for integrating the Job Cost, Subcontract Management, and Contract Billing systems.

Figure 1–1   Change Management System
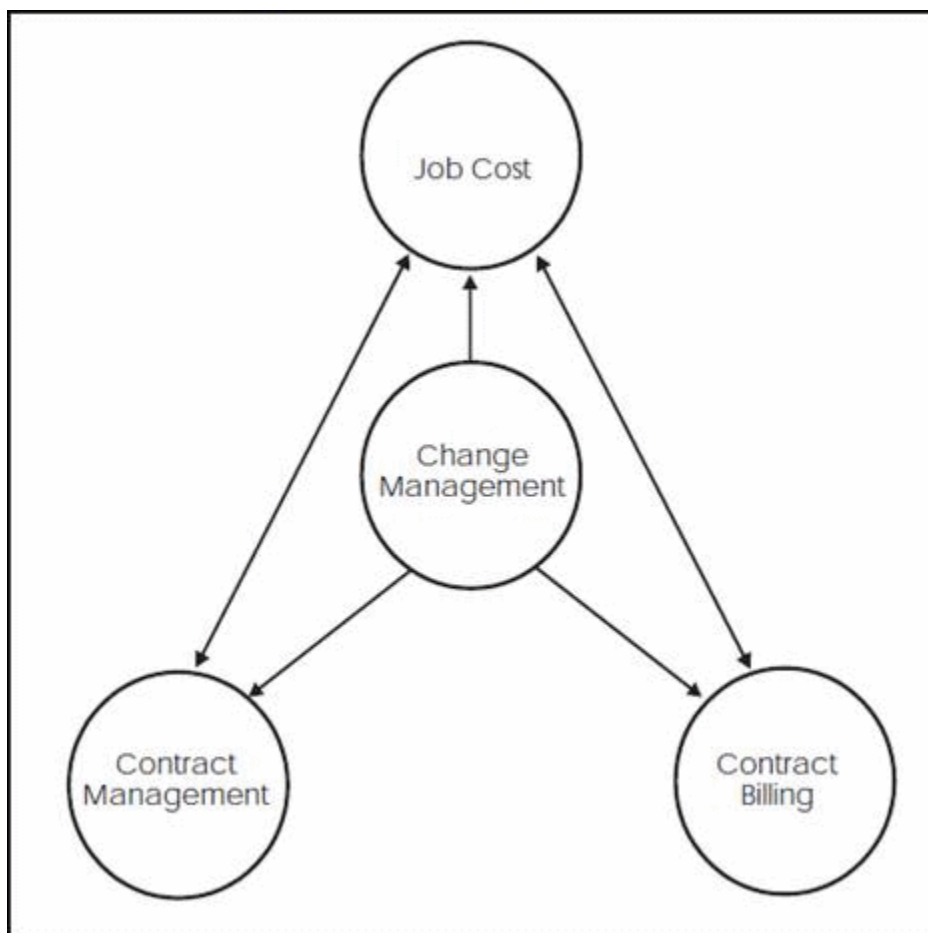
When you change account distribution information in a change request, the system updates the balances for the ledger types specified by the status codes that are assigned to each line item of the change request. For example, you can define a status code that automatically updates the Job Cost budget ledger type.

In addition, you can access and retrieve Change Management information from either the Subcontract Management or Contract Billing systems.

Part I

Change Requests

This part contains these chapters:

2

Overview to Change Requests

This chapter contains this section:

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You use change requests to record and track changes to a job. A change request includes the following:

- A job number to link the change request to a job

- Account distribution information for each line item

This information must have a status code assigned to it. In the early stages of the approval process, this usually is a status code that does not have an associated ledger type.

- Contract information to link information in the change request to the appropriate contract in the Subcontract Management or Contract Billing system

In addition, a change request can include the following:

- General information to identify it, such as the originator, the person who requested it, and the responsible manager

- Information about related documents, such as submittals, transmittals, and engineering drawings

- Extended explanatory text

Creating a change request consists of:

- Entering identifying information

- Entering change request details

- Recording related documents and activities

2.1 Status Codes

As you move a change request through various proposal and approval stages, you constantly update its status by means of user defined status codes. You define these codes using the Status Code Update Table program (P530019) and the system stores them in the Change Request - Status Update Table (F53001). A status code specifies the stage in the approval process for a line item of a change request. Codes that represent later stages in the process have associated ledger types to automatically update the appropriate ledgers when the line item is changed. Status codes have other attributes assigned to them, such as whether the code represents cost, revenue, or buyout information and whether the information is original, quoted, or final.

> **Note:** Do not confuse status codes that are defined in the Status Code Update Table with status codes defined in the User Defined Codes (UDC) table 53/ST. Status codes defined in UDC 53/ST are used in the Change Request Revisions program (P53019) as part of the identifying information for a change request and are informational only. They do not update ledgers.

2.1.1 Before You Begin

- Set up status codes using the Status Code Update Table program (P530019). See *Set Up Status Codes*.

3

Enter Identifying Information

This chapter contains these sections:

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You must enter information that identifies a change request before you can enter details about it. The system requires very little identifying information to enter a change request. Identifying information is not account specific.

Complete the following tasks:

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Identifying information consists of general information and optional descriptive text that provides additional information about a change request. The system stores general information in the Change Request Master table (F5301). The system stores descriptive text in the Change Request Detail Description table (F53015).

3.1 Entering General Information

Navigation

From Change Management Processing (G53119), choose Change Request Revisions

To enter general information

1. On Change Request Revisions, complete the following required fields:

   - Job Number *

   - Description

Figure 3–1   Change Request Revisions screen (Buyout A)
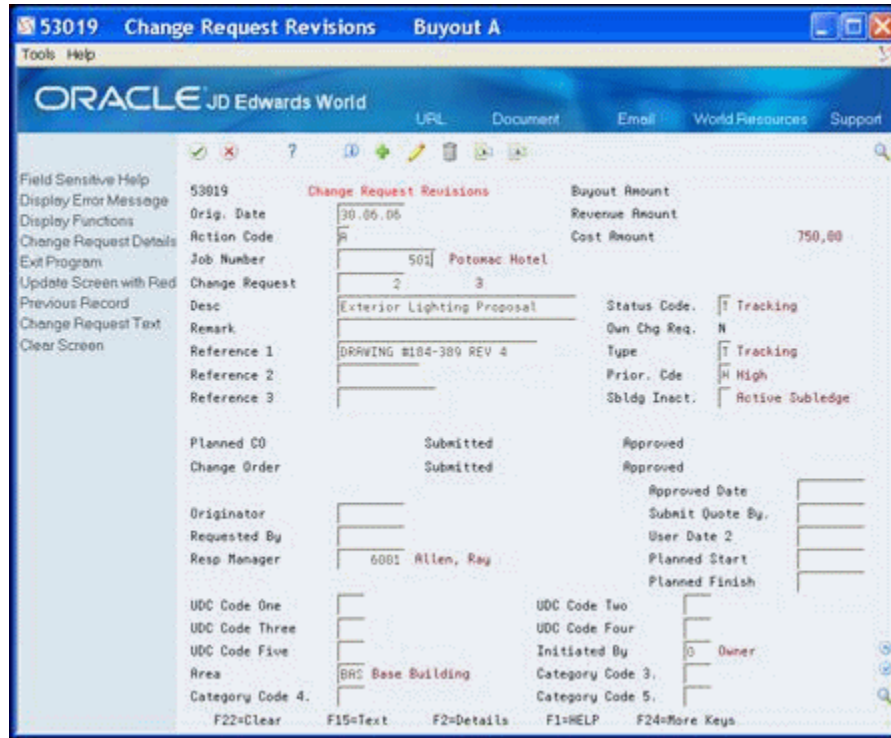
2. Complete any of the following optional fields:

- Change Request
- Status Code *
- Remark
- Owner Change Required
- Reference 1*
- Reference 2-3
- Type *
- Priority Code *
- Subledger Inactive
- Approved Date
- Originator *
- Submit Quote By
- Requested By
- User Date 2
- Responsible Manager *
- Planned Start
- Planned Finish
- UDC Code 1-5
- Initiated By

- Area

- Category Code 3-5

> **Note:** You can use fields with an asterisk (*) as search criteria on Manage Change Request (P532109).

Field	Explanation
Job Number	The number of the job, or project, that the change request is associated with. This number must be set up in the Business Unit Master table (F0006).
Change Request	The number of the change request for a particular job. *Screen-specific information* If you leave this field blank when you add a change request, the system assigns the next number for the job. If you enter a number, the system assigns subsequent change request numbers starting from the number you assign.
Desc	A user defined name or remark. *Screen-specific information* A description of the change request.
Status Code	This code (UDC 53/ST) indicates the status of the change request. It is for information only and is not attached to a ledger type. It should not be confused with the status codes defined in the Status Code Update Table.
Remark	A generic field that you use for a remark, description, name, or address.
Own Chg Req	A code that indicates whether owner approval is required before beginning work on the change request. You can use this code to indicate whether the work is in or out of scope of the original contract. If out of scope, the owner approval is required. This field is for reporting purposes only and does not affect the processing of the change request. Valid codes are: Y – Requires owner approval (out of scope). N – Does not require owner approval (in scope). blank – The field is ignored.
Reference 1	Any number used to identify a specific source document or originating entry that might be related to a change request.
Type	A user-defined code (53/TY) that indicates the type of change request.
Reference 2	A general purpose reference number that provides a cross-reference for a specific change request.
Prior. Cde	A user-defined code (53/PR) that indicates the priority of the change request.
Reference 3	Any number used to identify a specific source document or originating entry that might be related to a change request.
Subledger Inactive	A code (00/SI) that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive.

Field	Explanation
Approved Date	The date on which the person with the appropriate authority approves a requisition or voucher.
Originator	The address book number of the person who originated the change request.
Submit Quote By	User-defined Julian date 1.
Requested By	The address book number of the person making the request.
User Date 2	User defined Julian date 2.
Resp Manager	The address book number of the person who approves the change request.
Planned Start	The date when the item or line of work is to start.
Planned Finish	The date when the item or line of work is to finish.
UDC Code One-Five	User Defined Codes (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes. *Screen-specific information* UDCs One through Five (RB06-RB10) are job-specific codes.
Initiated By	User-defined codes (53/01) (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.
Area	User-defined codes (53/02) (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.
Category Code 3-5	User-defined codes (53/03) (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes. *Screen-specific information* These UDCs also include codes 53/04 and 53/05.

3.1.1 What You Should Know About

Deleting	Description
Deleting a change request	You can delete a change request only if you did not enter information for the change request in any of the following tables: ■ Change Request Details (F5302) ■ Change Request Log (F4303) ■ Change Request Text (F53015)

3.2 Entering Descriptive Text

Navigation

From Change Management Daily Operations (G53119), choose Change Request Revisions

Descriptive text is additional information about the change request, which is an optional task you can perform after you enter the general information.

To enter descriptive text

1. On Change Request Revisions, locate the change request.

2. Choose Change Request Text (F15).

Figure 3–2   Change Request Description screen
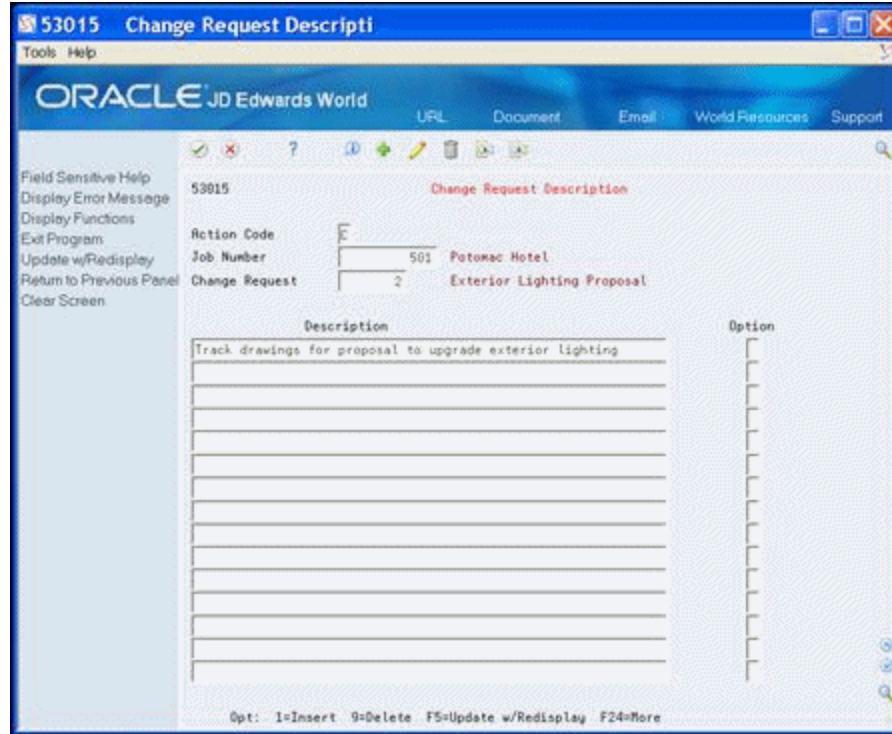
3. On Change Request Description, enter the descriptive text for the change request.

3.2.1 What You Should Know About

Descriptive Text	Description
Inserting and deleting lines	You must use a C action code to insert and delete lines in a change request.

3.2.2 Processing Options

See Section 15.1, "Change Request Revisions (P53019)".

4

Enter Change Request Details

This chapter contains these topics:

Change request details consist of the following:

- Account distribution information for cost, revenue, and buyout.
- Descriptive text about individual line items of the change request.
- Contract information that allows you to link the account distribution information to the appropriate contract in the Subcontract Management or Contract Billing system.

The system stores account distribution information in the Change Request Set Up File table (F5302) and descriptive text in the Change Request Set Up Text File table (F53024).

If you are using a status code that has a ledger type attached to it, the system copies the following information into the Account Ledger table (F0911):

- The description of the general information for the change request is copied into the Alpha Explanation field (EXA).
- The description of the account distribution information for the change request is copied into the Remark Explanation field (EXR).
- The change request number is copied into the second reference field (R2).

You can access Change Request Details from Change Request Revisions by choosing Change Request Details (F2).

Complete the following tasks:

4.1 Before You Begin

- Verify that status codes are set up in the Status Code Update Table program (P530019). See *Section 14.1, "Setting Up Status Codes"*.

- If you are going to use this information in a contract in Subcontract Management or Contract Billing, verify that contract information you want to enter for a change request exists in the Contract Billing Master table (F5201) or the Purchase Order Header File table (F4301), depending on whether you enter it for revenue or cost.

4.2 Processing Options

See Section 15.2, "Change Request Detail (P53029)"

Navigation
From Change Management Processing (G53119), choose Change Request Details

4.3 Entering Account Distribution Information

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

- Cost - the cost, or budget, information that relates to your company

- Revenue - the revenue information that relates to the owner

  You can associate this information with a contract in the Contract Billing system.

- Buyout - the subcontractor

  You can associate this information with a contract in the Subcontract Management system.

Information you enter for any category on a line item must have a status code with it. If the status code includes a ledger type, the information updates the account balance for that ledger. Cost and buyout share the same account number.

If you access Change Request Details from Change Request Revisions, you do not need to locate the change request on Change Request Revisions prior to accessing Change Request Details.

You can enter account distribution information in the following ways:

- Enter multiple accounts. You can enter up to 100 accounts at a time to create new line items.

- Enter accounts one at a time. You can enter accounts to line items one at a time. This is useful when you want to add accounts after the line items have been created and when you want more than one account per line item (both cost and revenue).

Complete one of the following tasks:

- Enter multiple accounts

- Enter accounts one at a time

4.3.1 What You Should Know About

Entering Account Distribution Information	Description
Required account numbers	If you enter 1 in the Edit Option processing option to require account numbers and dates, you must enter account numbers before you can enter amounts and status codes.
Changing account numbers	After you assign a status code with a ledger type to the account in the line item, you cannot change an account number for a line item.
Deleting all line item information	You can delete all line item information for a change request only if the status codes in the change request do not include ledger types.
Inserting and deleting line items	You must click Change to insert and delete line items. You can delete a line item only if status codes in the line item do not include ledger types.

See Also:

- Section 14.1, "Setting Up Status Codes"

4.3.2 Entering Multiple Accounts

When you enter multiple accounts, the system creates a separate line item for each account you chose from the Cost Code/Type Search window. When you choose accounts from this window, the system enters the information in the Description field and the Unit of Measure, Business Unit, Object, and Subsidiary fields in the detail area. It enters either cost account or revenue account information based on the account you choose. The system adds the line items starting with the first blank line on Change Request Details.

This method allows you to enter only one account per line item. If you want to enter an additional account to any line item, you need to enter it separately after using this method to create the line items.

Set the Desired Screen Order processing option to control the order in which the Buyout/Subcontractor, Revenue/Owner, and Cost/Budget screens display.

> **See Also:** ■ Section 4.3.4, "Entering Accounts One at a Time" if you want to add an additional account to any line item after creating the line items

To enter multiple accounts

1. On Change Request Details, complete the following fields to locate the change request:

   - Job Number

   - Change Request

Figure 4–1   Change Request Details
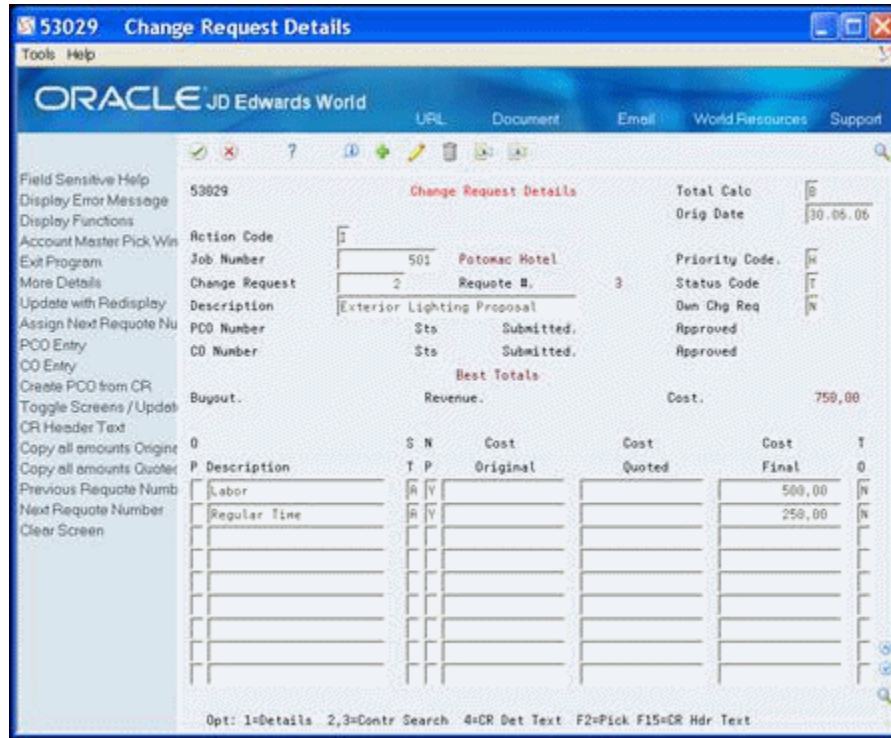
2.   To enter buyout information, choose the Toggle Screens/Update (F11) until Buyout displays in the column headings of the Original, Quoted, and Final fields.

3.   Choose Account Master Pick Window (F2) to access the Cost Code/Type Search window.

Figure 4–2   Cost Code/Type Search Window
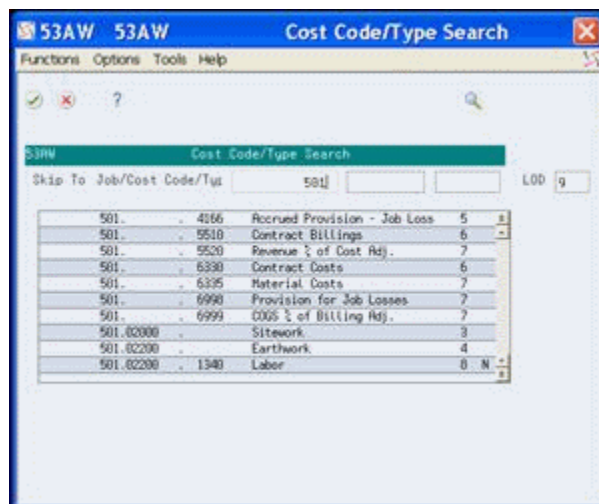
4.   On the Cost Code/Type Search window, choose an account for which you want to create a line item, and choose one of the following from the Option menu.

   ■   Return with Account (and Account Detail Description)

   ■   Return with Account (and Account Header Description)

5. On Change Request Details, choose More Details (F4) to review account information in the detail area fields.

Figure 4–3   Change Request Details screen showing more details section
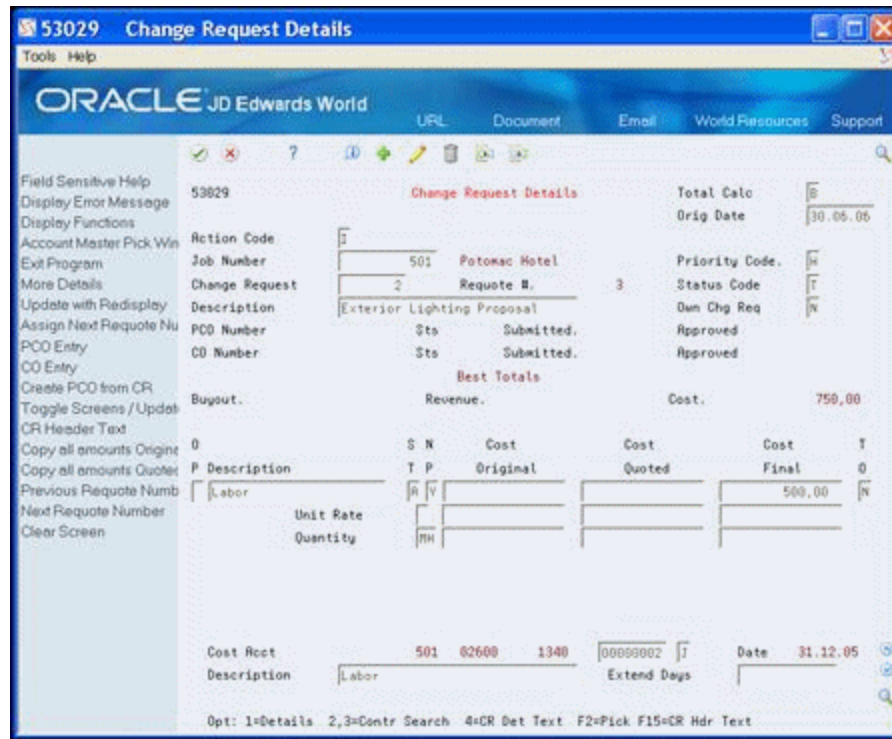
6. For each new line item, complete any of the following fields:

■ Buyout/Revenue/Cost Original

■ Buyout/Revenue/Cost Quoted

■ Buyout/Revenue/Cost Final

7. Complete the following field:

■ Status

8. To enter revenue and cost information, choose the Toggle Screens/Update (F11) until Revenue or Cost displays in the column headings of the Original, Quoted, and Final fields.

9. Repeat steps 3-7.

Field	Explanation
Change Request	The number assigned to the change request for a particular job.
Unit of Measure	A user defined code (00/UM) that identifies the unit of measurement for an amount or quantity.
	Screen-specific information
	The system retrieves the default unit of measure from the Account Master table (F0901).
Business Unit	This field is used to store the business unit for the cost, buyout, or revenue account of a change request.

Field	Explanation
Subsidiary	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.
Object Account	The portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories. For example, dividing labor into regular time, premium time, and burden.
	Note: If you are using a flexible chart of accounts and the object account is set to 6 digits, JD Edwards World recommends that you use all 6 digits. For example, entering 000456 is not the same as entering 456, because if you enter 456, the system enters three blank spaces to fill a 6-digit object.
S T	A code defined by the user that specifies the status of a change request for a selected job and line item. This code is used in the approval process of the change request. It determines which ledger type is updated in the Account Balances table (F0902).
	Screen-specific information
	Note: Status codes are defined in the Status Code Update Table (F53001), not on the User Defined Codes screen.
	You must enter a valid status code when you enter an amount, quantity, or unit price.
	Until you enter an account number for the information, you can use only status codes that do not have ledger types attached to them.
	Each time you use a status code that has ledger types attached to it, you affect the Account Ledger table and the Account Balances table. As you change status codes, you move amounts and quantities into the new ledger type and out of the old ledger type, thus keeping the ledger types in balance.

4.3.3 What You Should Know About

Entering Multiple Accounts	Description
Line Item Date	This is the general ledger date of the line item found in the detail area.
	If you enter 1 in the Edit Option processing option, you can leave this field blank until you enter a status code with a ledger type. If you leave this processing option blank, the default date that the system enters is one of the following, depending on how you set the Default Date processing option:
	■ The current date.
	■ The date from the current period set up in the company fiscal patterns for the company in which the job resides.
	If you leave the Audit Trail Creation Selection processing option blank (to create audit trail records per period change) and the date for a line item is not the period end, the system automatically changes the date to the period end date when the status updates a ledger type. That is, the system changes the date when you enter a status code with a ledger type or when you change the amount and the status code has a ledger type.

Entering Multiple Accounts	Description
Associating a change request with contracts	To associate a change request line with a contract in Contract Billing, enter 2 in the Option field to access Contract Search. Locate the contract and enter 4 in the Option field to update the Change Request Details line item with the contract information.
	To associate a change request line with a contract in Subcontract Management, enter 3 in the Option field to access Subcontract Search. Locate the contract and enter 4 in the Option field to update the Change Request Details line item with the contract information.

4.3.4 Entering Accounts One at a Time

You can also access Change Request Details from Change Request Revisions by choosing Change Request Details (F2).

Enter any combination of the following categories of account distribution information for each line item:

- Cost - the cost, or budget, information associated with your company

- Revenue - the revenue information associated with the owner

- Buyout - the supplier information

> **Caution:** Be aware that if you assign status codes to both cost and buyout with ledger types, you might overstate the value for a line item. This is because both cost and buyout categories use the cost account.

Complete any of the following tasks:

- To enter buyout accounts

- To enter revenue accounts

- To enter cost accounts

To enter buyout information

1. On Change Request Details, complete the following fields to locate the change request

   - Job Number

   - Change Request

Figure 4–4   Change Request Details screen
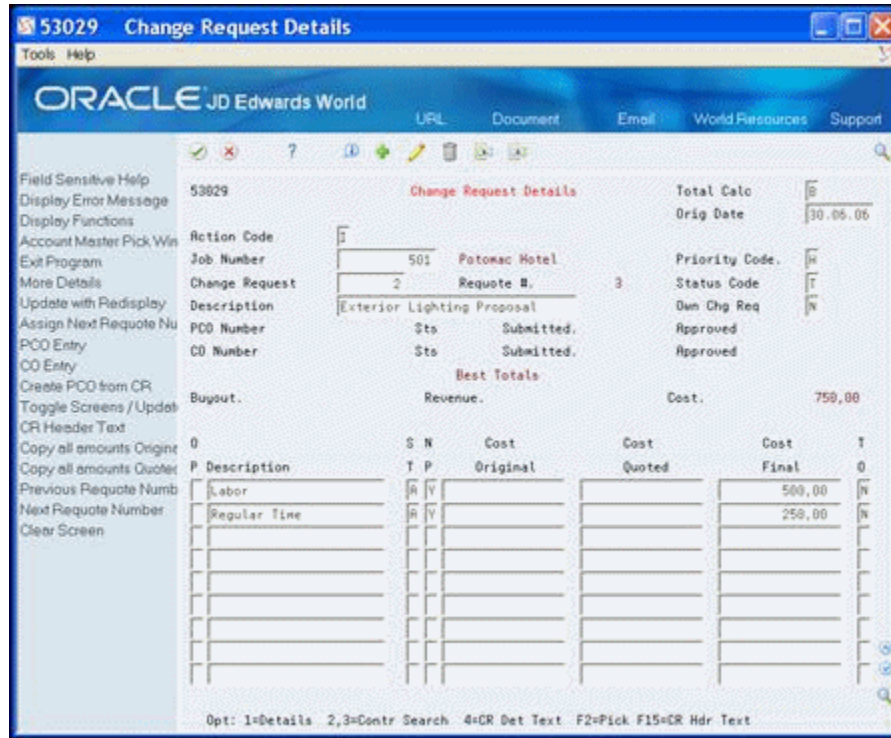
2. To enter buyout information, choose the Toggle Screens/Update (F11) until Buyout displays in the column headings of the Original, Quoted, and Final fields.

3. Choose Account Master Pick Window (F2) to access the Cost Code/Type Search window.

Figure 4–5   Cost Code/Type Search Window
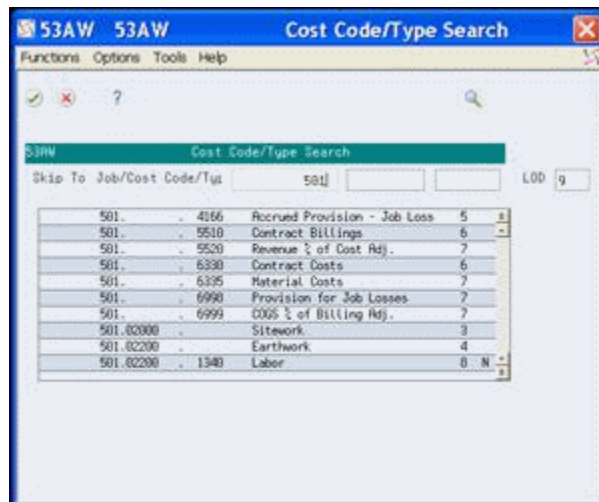
4. On the Cost Code/Type Search window, choose an account for which you want to create a line item, and choose one of the following from the Option menu.

    ■ Return with Account (and Account Detail Description)

    ■ Return with Account (and Account Header Description)

5. On Change Request Details, choose More Details (F4) to review account information in the detail area fields.

Figure 4–6   Change Request Details screen showing more details
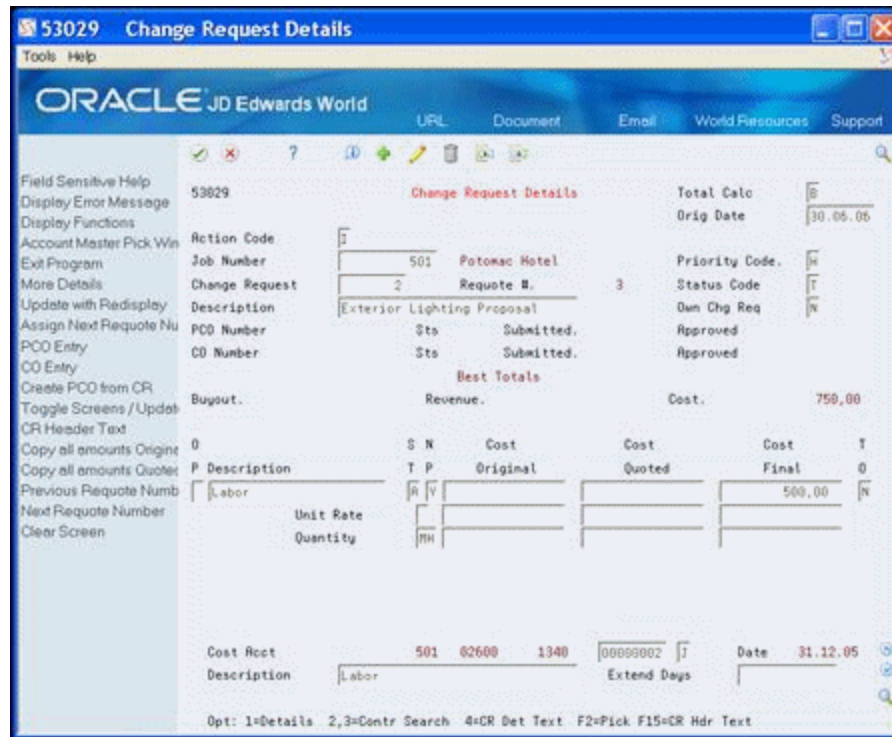
6. For each new line item, complete any of the following fields:

- Buyout Original

- Buyout Quoted

- Buyout Final

7. Complete the following field:

- Status

To enter revenue account information

1. On Change Request Details, locate the change request by completing the following fields:

- Job Number

- Change Request

2. To enter revenue information, choose the Toggle Screens/Update (F11) until Revenue displays in the column headings of the Original, Quoted, and Final fields.

3. Choose Account Master Pick Window (F2) to access the Cost Code/Type Search window.

4. On the Cost Code/Type Search window, choose an account for which you want to create a line item, and choose one of the following from the Option menu.

- Return with Account (and Account Detail Description)

- Return with Account (and Account Header Description)

5. On Change Request Details, choose More Details (F4) to review account information in the detail area fields.

6. For each new line item, complete any of the following fields:

   - Revenue Original

   - Revenue Quoted

   - Revenue Final

7. Complete the following field:

   - Status

To enter cost account information

1. On Change Request Details, locate the change request by completing the following fields:

   - Job Number

   - Change Request

2. To enter cost information, choose the Toggle Screens/Update (F11) until Cost displays in the column headings of the Original, Quoted, and Final fields.

3. Choose Account Master Pick Window (F2) to access the Cost Code/Type Search window.

4. On the Cost Code/Type Search window, choose an account for which you want to create a line item, and choose one of the following from the Option menu.

   - Return with Account (and Account Detail Description)

   - Return with Account (and Account Header Description)

5. On Change Request Details, choose More Details (F4) to review account information in the detail area fields.

6. For each new line item, complete any of the following fields:

   - Cost Original

   - Cost Quoted

   - Cost Final

7. Complete the following field:

   - Status

4.4 Entering Descriptive Text

Descriptive text is additional information about a line item and this is an optional task after you enter the account distribution information.

To enter descriptive text

1. On Change Request Details, locate the change request.

2. Enter 4 in the Option field next to the line item for which you want to add text.

Figure 4–7 Change Request screen showing option column
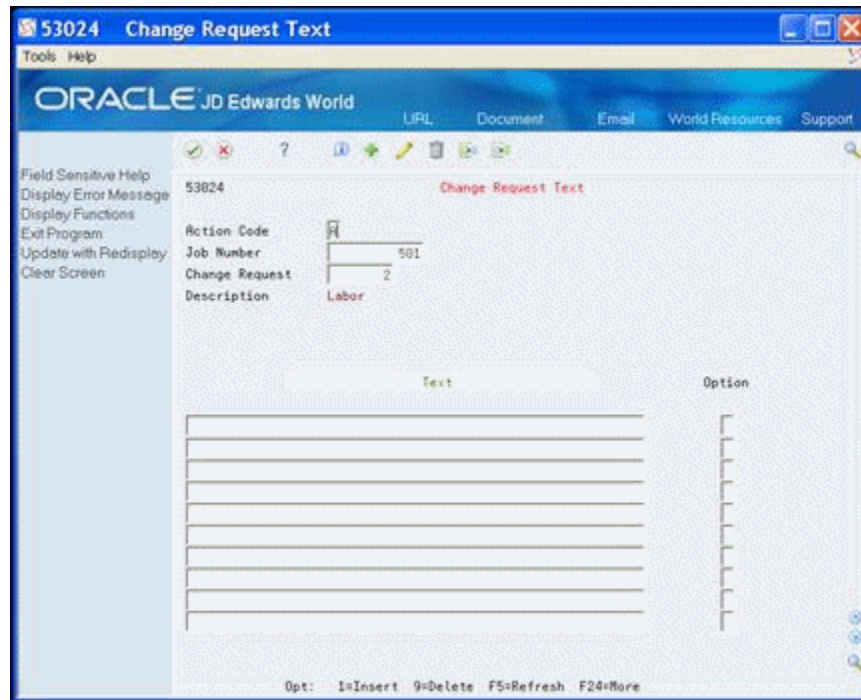
3. On Change Request Text, enter the descriptive text for the line item.

4.4.1 What You Should Know About

Descriptive Text	Description
Inserting and deleting lines	You must click Change to insert and delete lines.

4.5 Entering Contract Information

Before you can copy revenue and buyout information in the change request to the appropriate owner and supplier contracts in the Contract Billing and Subcontract Management systems, you must:

- Enter contract information for revenue
- Enter contract information for buyout

To enter contract information for revenue

1. On Change Request Details, locate the change request.

2. Choose the Toggle Screens/Update (F11) until Revenue information displays.

3. Enter 1 in the Option field next to the line item for which you want to enter revenue contract information.

Figure 4–8   Revenue Change Details screen
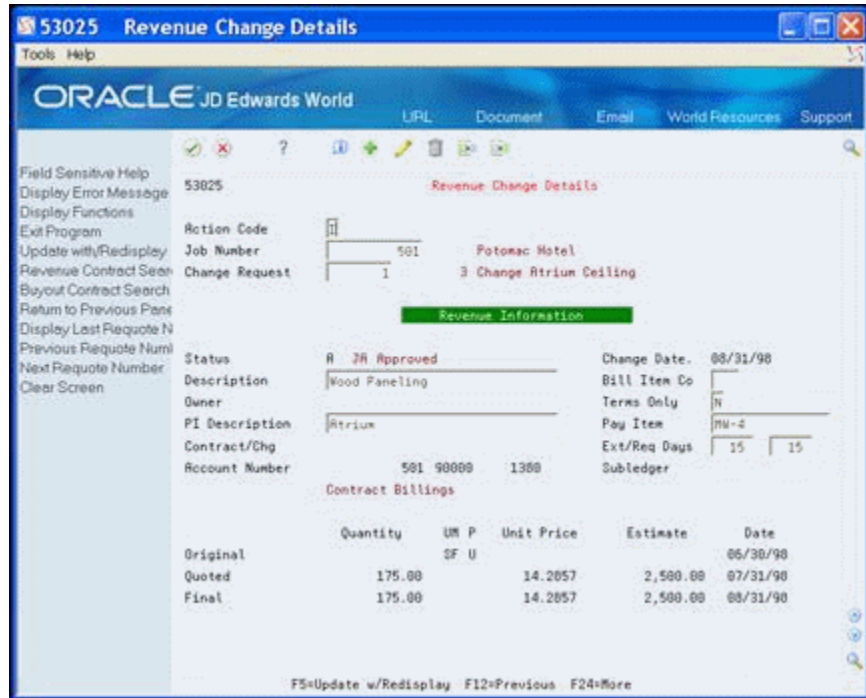
4.   On Revenue Change Details, choose Revenue Contract Search (F10).

Figure 4–9   Contract Search screen
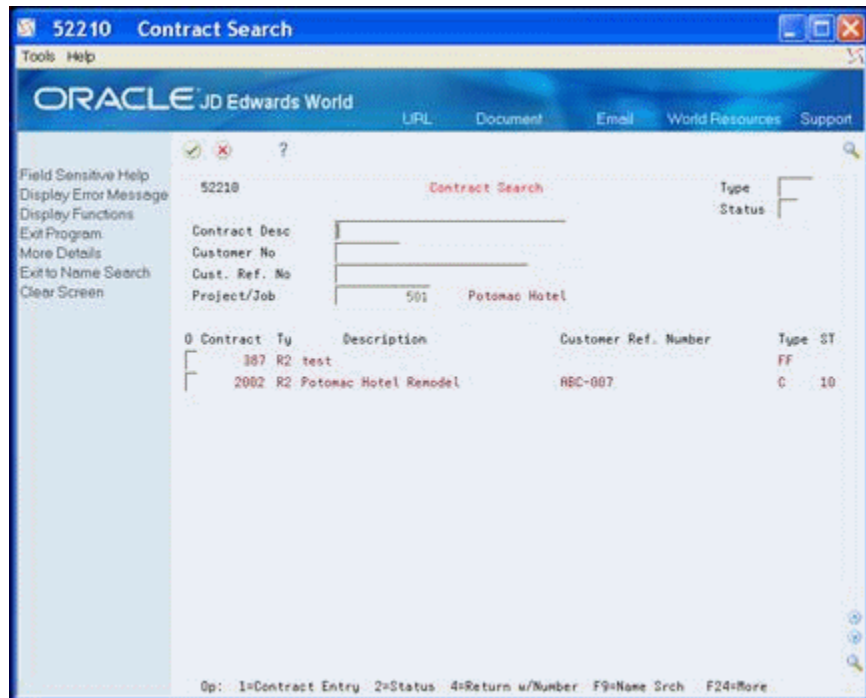
5.   On Contract Search, enter 4 in the Option field next to the contract.

When you choose a contract, the system displays only the contract number on Revenue Change Details.

6. On Revenue Change Details, complete the following fields and click Change:

- PI (pay item) Description

- Pay Item

Field	Explanation
Contract Number	The contract number used in the Contract Billing system. This number, along with the contract type and contract company, provides the link between the Contract Billing and Change Management systems. It will allow you to copy revenue information for a change request into the Contract Billing system.
Change Number	The change order number tied to a contract in the Contract Billing system. This field and the contract number, contract type, and company number are used to link the change request to the Contract Billing system. They must exist in the Contract Header table (F5201).
	Screen-specific information
	The default number is 000.

To enter contract information for buyout

1. On Change Request Details, locate the change request.

2. Choose the Toggle Screens/Update (F11) until Buyout information displays.

3. Enter 1 in the Option field next to the line item for which you want to enter buyout contract information.

Figure 4–10   Change Request Details screen showing buyout information

4. On Buyout Change Details, choose Buyout Contract Search (F11).

5. On Subcontract Search, enter 4 in the Option field next to the contract.

When you choose a subcontract, the system displays the subcontract number on Buyout Change Details.

6. On Revenue Change Details, click Change.

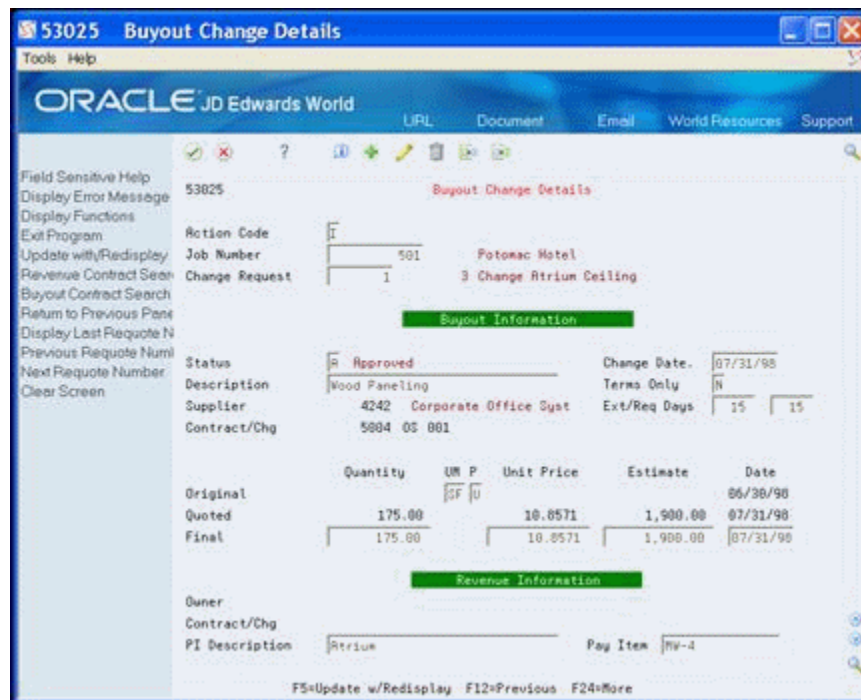| Field	Explanation
Contract Number	The contract number used in the Subcontract Management system. This number, along with the subcontract type and subcontract company, provides the link between the Subcontract Management and Change Management systems. It allows you to copy buyout information for a change request into the Subcontract Management system.
	Screen-specific information
	This is the subcontractor contract number associated with the contract. This number must exist in the Purchase Order Header File table (F4301).
	The default number is 000.
Contract Type	The contract type tied to a contract in the Subcontract Management system. This code is defined in user defined codes (00/DT). This field, along with the contract number and the contract company, link the change request to the Subcontract Management system.
Order Suffix	The change order number tied to a contract in the Subcontract Management system. This field and the subcontract number, subcontract type, and company number are used to link the change request to the Subcontract Management system. They are edited against the Purchase Order Header File table (F4301).

5

Record Documents and Activities

This chapter contains these topics:

Any time after you create a change request, you can record information about documents and activities that relate to a change request. Documents can include submittals, transmittals, and engineering drawings. Activities are tasks or events that must be complete, such as obtaining the owner's approval or scheduling an inspection.

In addition to general information about documents and activities, you can enter information to reference a document or activity to either of the following:

- A supplier address book number
- A contract number and contract type in the Subcontract Management system

You can also add descriptive text to provide additional information about the document or activity.

The system stores information about documents and activities in the Log Master table (F4303) and descriptive text in the Change Request Log Text table (F53034).

You can also access Change Request Log Revisions from Change Request Revisions by choosing Logs.

5.1 Entering General Information

Navigation
From Change Management Inquiries (G53139), choose Log Revisions

This section discusses entering general information.

5.1.1 To Enter General Information

On Change Request Log Revisions

1. Locate the change request.

Figure 5–1   Change Request Log Revisions screen
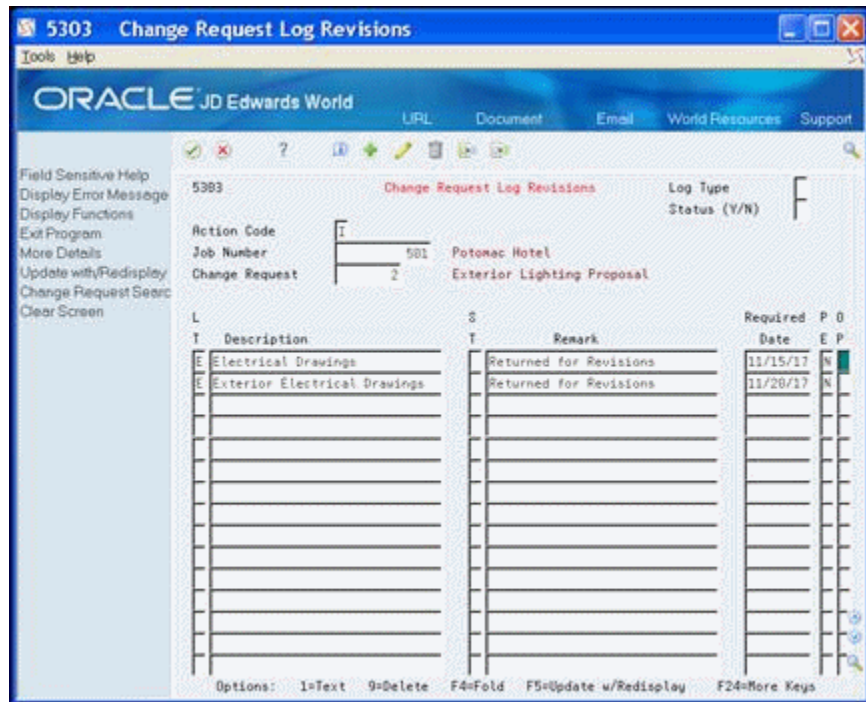
2. Complete the following fields:

   ■   Log Type

   ■   Description

   ■   Log Status

   ■   Remark

   ■   Required Date

   ■   Pay Effect

   After you enter general information, you can continue by entering reference text.

Field	Explanation
Log Type	A user defined code (00/LG) that specifies the type of information in a log entry. The log type is used to group similar types of entries.
	Screen-specific information
	If you leave this field blank, the system supplies the log type from the default specified in the data dictionary.
Description	A user defined name or remark.
	Screen-specific information
	A description of the log item. If you leave this field blank, the system supplies the Description-2 description for the specified log type.

Field	Explanation
Log Status Code	A code that specifies whether the requirements for the log line have been satisfied. Valid codes are: Y – Yes, the requirements have been satisfied. N – No, the requirements have not been satisfied. blank – The requirements have not been satisfied, the log line is not yet in effect, or no status is required. *Screen-specific information* The status code has no effect on the payment of subcontracts.
Remark	An optional field for additional information about the log entry.
Required Date	The date that the log entry needs to be received. For example, consider a submittal requirement for an insurance certificate. For such an entry, the date that a copy of the policy or certified proof of coverage document is to be received would be entered in the Required Date field.
Pay Effect	A code normally used in conjunction with submittal log entries. It indicates whether the submittal requirement is of such importance that regular payments to the subcontractor can be suspended if the submittal requirement is not properly satisfied. If Pay Effect is set to Y, various warning messages can appear during progress payment entry when there are outstanding log requirements. Valid codes are: Y – Issue warning messages if log requirements are not met. N – Do not issue warning messages. *Screen-specific information* The pay effect code has no effect on the payment of subcontracts.

5.1.1.1 What You Should Know About

Topic	Description
Deleting line items	You must enter 9 in the Option field and then click Change to delete line items.

5.2 Entering Reference Information

Perform this task after you enter the general information for the document or activity.

5.2.1 To enter reference information

On Change Request Log Revisions

1.   Access the detail area.

Figure 5–2   Change Request Log Revisions screen (Detail area)
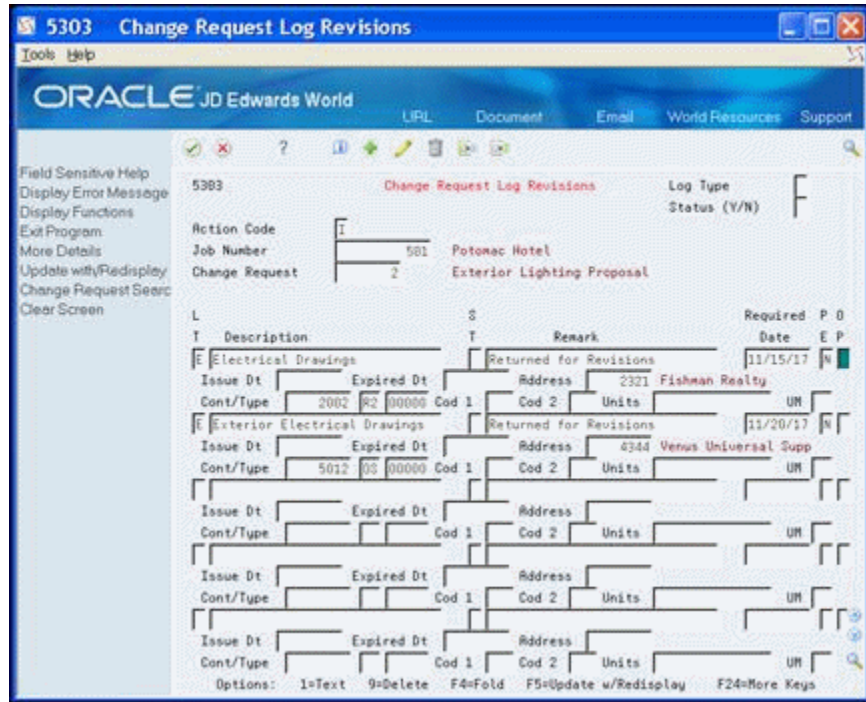
2.   Complete the following fields:

   ■   Issue Date

   ■   Expired Date

   ■   Address

   ■   Contract Number

   ■   Contract Type

   ■   Contract Company

   ■   Category Codes 1 and 2

   ■   Units

   ■   Unit of Measure

   After you enter reference information, you can continue by entering descriptive text.

5.3 Entering Descriptive Text

Perform this task after you enter the reference information for the document or activity.

5.3.1 To enter descriptive text

On Change Request Log Revisions

1.   Enter 1 in the Option field.

2.   On Change Request Log Text, enter the descriptive text for the document and click Enter.

Figure 5–3 Change Request Log Text screen
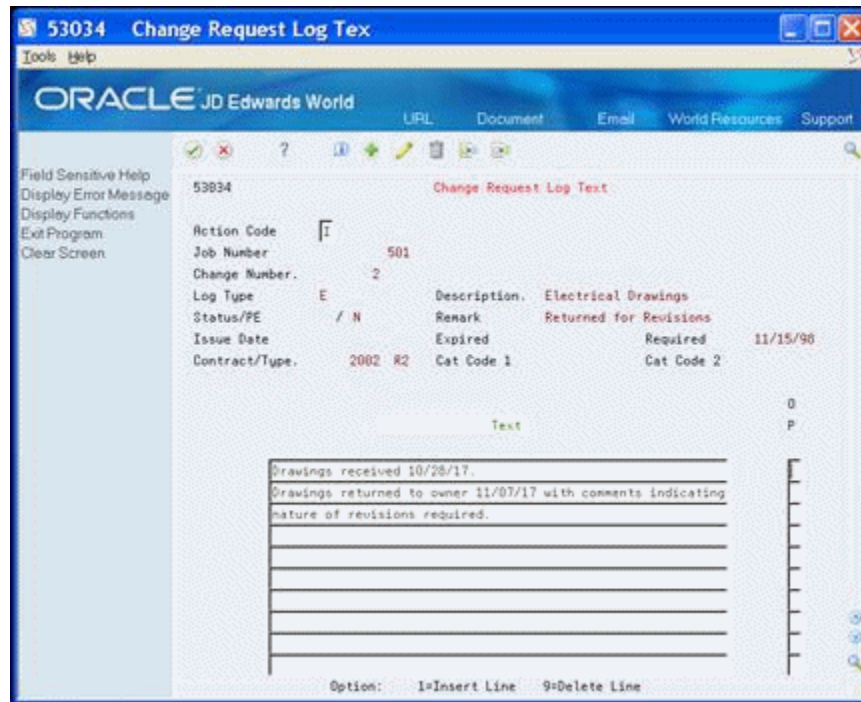
5.3.1.1 What You Should Know About

Topic	Description
Inserting and deleting lines	You must click Change to insert and delete lines.

Part II

Approvals

This part contains these chapters:

6

Overview to the Approval Process

This chapters contains these topics:

JD Edwards World Change Management system uses an approval process in which a change request moves through various approval stages by means of user defined status codes. The status codes specify:

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

You define status codes in the Status Code Update Table program (P53001).

As you revise a change request, you can create requotes to record the changes in the system and provide an audit trail.

During the life cycle of the change request, it is likely that many revisions to the information will take place. After you revise account distribution information, you can create a requote to record the new information. This allows you at any time during the approval process to review the history of the change request to see previous revisions. When the account distribution information for a line item is approved for a particular stage in the process, you update the status code.

At any time during the approval process, you can attach the change request information to the relevant contract in the Subcontract Management or Contract Billing system. Usually, this occurs after final approval. The Change Management system retains information the system uses to amend a job's projected final cost, subcontract commitments, and contract schedule of values.

The approval process consists of:

- Reviewing and revising change requests
- Committing change requests
- Reviewing change requests

6.1 Amount and Quantity Type

You associate each status code with a particular amount and quantity type (original, quote, final or best) in the Status Code Update Table program (P530019). When you assign a status code with a ledger type to a line item for cost, revenue, or buyout, you

inform the system how to update account balances information using the original, quote, final, or best amount or quantity through a series of automatic approval stages.

6.2 Best Amount

The system determines and uses the best amount based on the following combinations of amounts (original, quote, and final) that you enter:

- If you enter only a final amount or a final amount in combination with other amounts, the system considers the final amount the best amount.

- If you enter a quote and an original amount, but do not enter a final amount, the system considers the quote the best amount.

- If you enter only an original amount, the system considers this the best amount.

6.3 Requotes

A requote is a snapshot of a change request. You can create requotes when you revise a change request, such as when you change amounts or statuses. Requotes provide an audit trail of the changes leading up to the current information in the change request.

See Also:

- Section 14.1, "Setting Up Status Codes"

7

Review and Revise the Change Request

This chapter contains these sections:

7.1 About Reviewing and Revising Change Requests

You review and revise information in a change request through all stages of your project or job.

Navigation
From Change Management Processing (G53119), choose Change Request Details

Processing Options
See Section 15.2, "Change Request Detail (P53029)"

7.2 Reviewing Change Request History

To review the history of a change request, you can:

- Review requotes
- Review ledger account history for individual line items for cost, revenue, and buyout information for individual line items
- Review original, quote, and final information for cost, revenue, or buyout
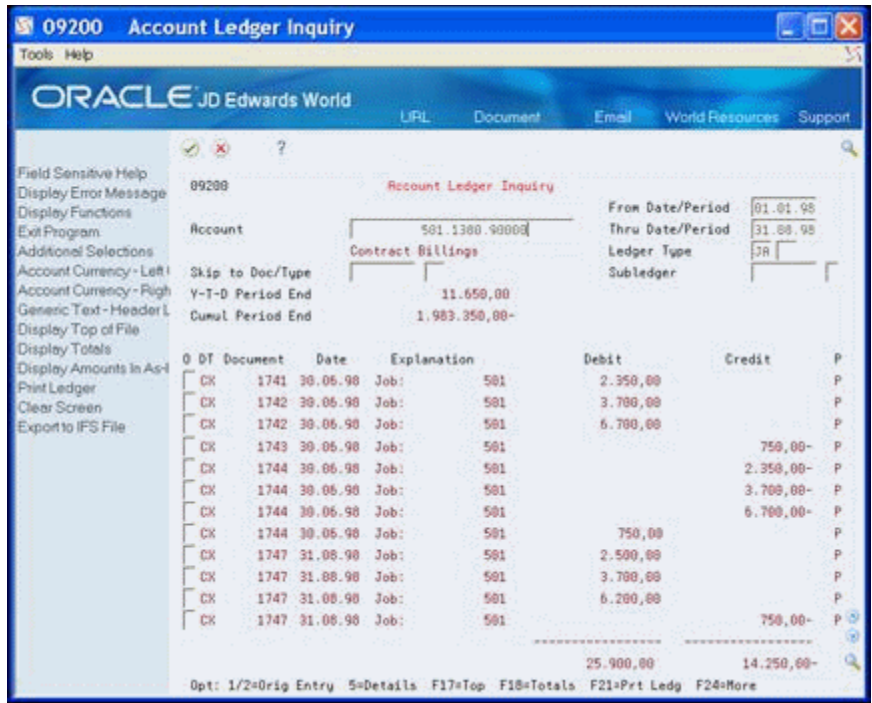
To review requotes

1. On Change Request Details, locate the change request.

   The change request displays with the most recent requote.

2. Choose Previous Requote Number (F19) or Next Requote Number (F20).

To review ledger account history for cost, revenue, and buyout

1. On Change Request Details, locate the change request.

2. Choose Toggle Screens/Update (F11) until the cost, revenue, or buyout information displays.

3. Enter 7 in the following field next to the line item you want to review.

   ■ Option

Figure 7–1 Account Ledger Inquiry screen

4. On Account Ledger Inquiry, review the ledger amounts.

   See Also:

   ■ *Review Account Ledgers* in the *JD Edwards World General Accounting I Guide* for more information.

To review original, quote, and final amounts for a line item

1. On Change Request Details, locate the change request.

2. Choose Toggle Screens/Update (F11) until the cost, revenue, or buyout information displays.

3. Enter 1 in the following field next to the line item you want to review.

   ■ Option

Figure 7–2   Cost Change Details screen
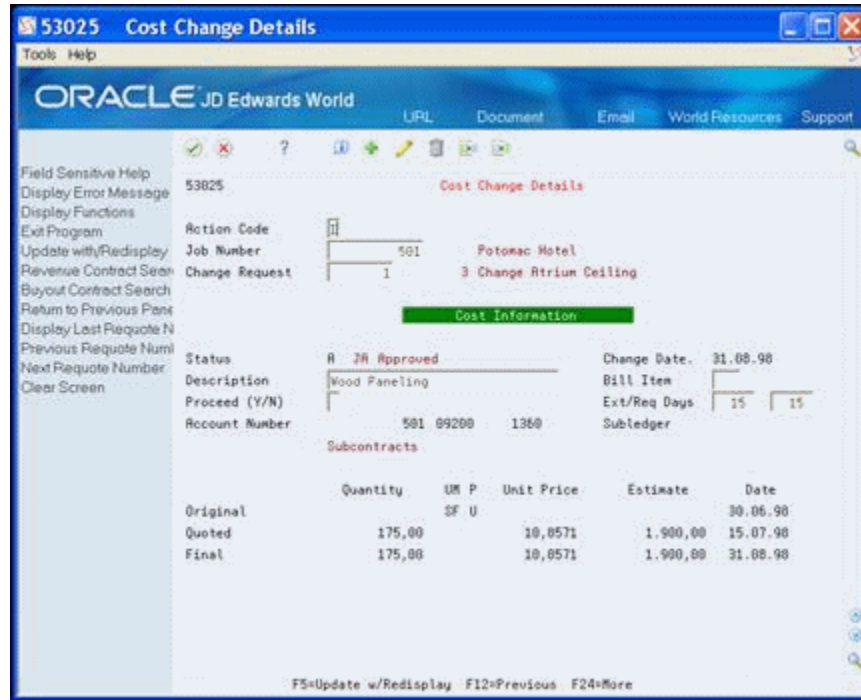
4.   Review the original, quote, and final information.

7.2.1 What You Should Know About

Changing Amounts	Description
Changing original, quote, or final amounts	You can change original, quote, or final amounts on Change Details, providing the status code does not update a ledger.

7.3 Revising Amounts

Complete this task when you receive new information about a job that requires you to revise amounts.

To revise amounts

1.   On Change Request Details, locate the change request.

2.   Change the appropriate amounts.

7.4 Creating Requotes

Before you change account distribution information for a change request, you can create a requote. This provides a record, or audit trail, of the changes leading up to the current information in the change request.

To create a requote

1.   On Change Request Details, locate the change request.

2.   Choose the Assign Next Requote Number (F6) and click Change.

7.4.1 What You Should Know About

Requotes	Description
Changing requotes	You can change only the last requote.
Deleting requotes	If you have more than one requote for a job and change number, you must delete requotes in the following sequence: ■ Delete the last requote ■ Delete each previous requote When you delete a requote, you do not affect any other requote.

7.5 Updating Status Codes

To move a change request from one stage to another in the approval process, you need to update the status codes for account distribution information.

To update status codes

1. On Change Request Details, locate the change request.

2. For each line item, choose Toggle Screens/Update (F11) until the cost, revenue, or buyout information displays.

3. Complete the following field and click Change.

   ■ ST (Status Code)

Field	Explanation
Status Code	A code defined by the user that specifies the status of a change request for a selected job and line item. This code is used in the approval process of the change request. It determines which ledger type is updated in the Account Balances table (F0902). *Screen-specific information* **Note:** Status codes are defined in the Status Code Update Table, not on the User Defined Codes screen.

8

Commit Change Requests

This chapter contains these topics:

You can copy account distribution information in a change request to the appropriate contract in the Subcontract Management or Contract Billing system any time after you assign contract numbers to the change request. By doing so, you are committing the change request to the respective system. When you commit a change request, the Change Management system creates a new commitment line item in the contract based upon the change request line item.

You usually commit a change request after you move the request through the approval process. You can copy information from the most recent requote only.

You can commit a line item only once to its respective system. After that, you cannot change it in the Change Management system.

Complete the following tasks:

Before You Begin
- Verify that contract numbers exist in the Subcontract Management or Contract Billing systems

8.1 Committing Change Requests to Subcontract Management

You can commit the following information in a change request to the appropriate contract in the Subcontract Management system:

- Buyout account information

- Pricing type

- Quantity

- Unit price

- Unit of measure

- Amount (final)

- Description

You can commit:

- All change requests

- Select change requests

To commit all change requests to Subcontract Management

Navigation
From Change Management Processing (G53119), choose All Requests to Ctr Mgmt

Using this DREAM Writer, you can commit all change requests and can copy the following information to the Subcontract Management system:

- Buyout account information

- Pricing type

- Quantity

- Unit price

You can run this program in proof or final mode.

8.1.1 Processing Options
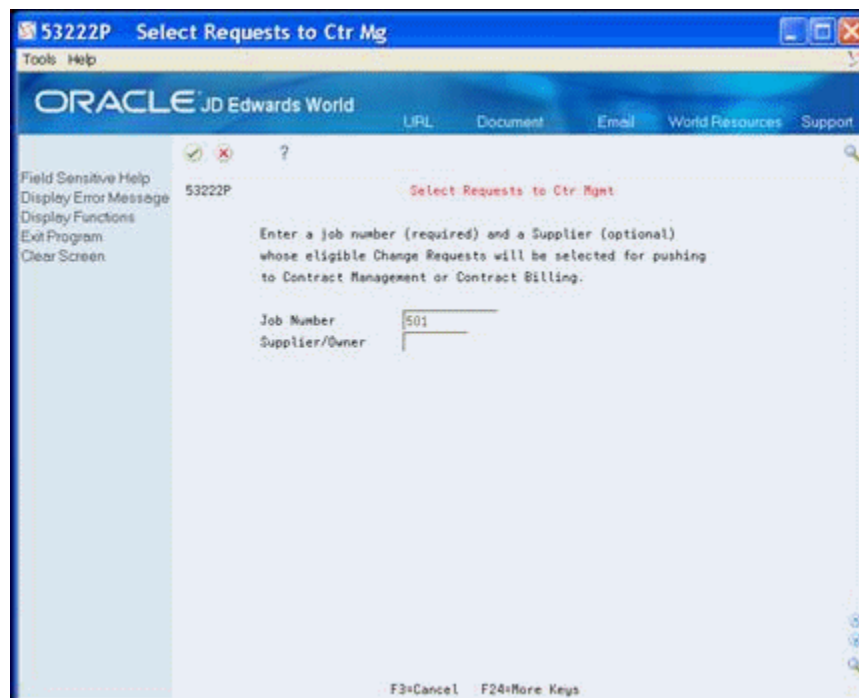
See Section 16.2, "Push Change Request (P53199)"

To commit select change requests to Subcontract Management

Navigation
**From Change Management Processing (G53119), choose Select Requests to Ctr Mgmt**

1. On Select Requests to Ctr Mgmt, complete the following field:

   - Job Number

*Figure 8–1 Select Requests to Ctr Management screen*

2. To narrow your search, complete the following optional field and click Enter:

■ Supplier/Owner

3. On the second Select Requests to Ctr Mgmt screen, enter Y in the Accept field and click Enter.

Figure 8–2   Select Requests to Ctr Management screen, second screen
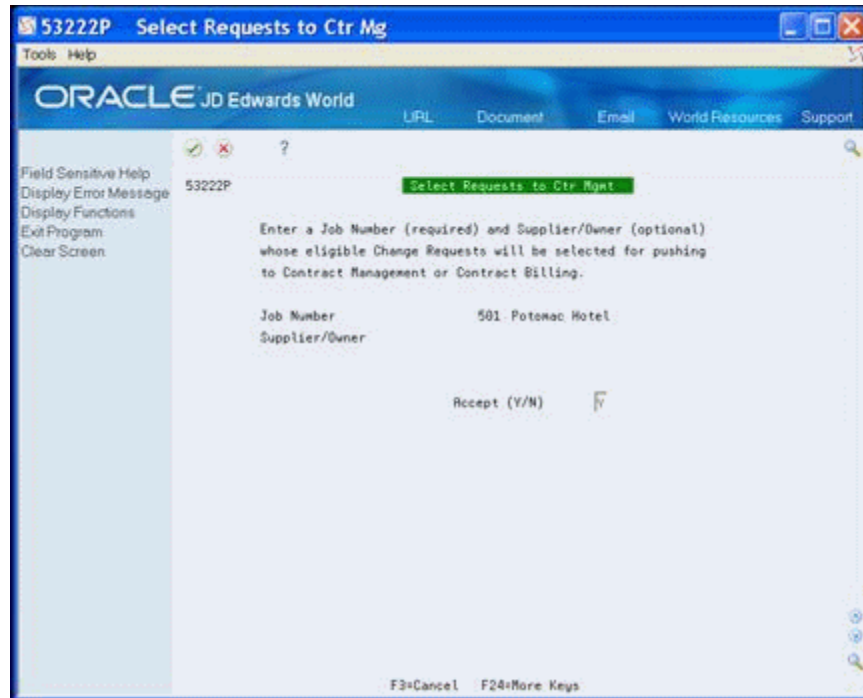
4. On Select Change Requests to Push, complete any of the following optional fields to narrow your search and then press Enter:

■ Status

■ Supplier

■ Contract

■ Contract Type

■ Order Suffix

■ Order Company

Figure 8–3   Select Change Requests to Push screen
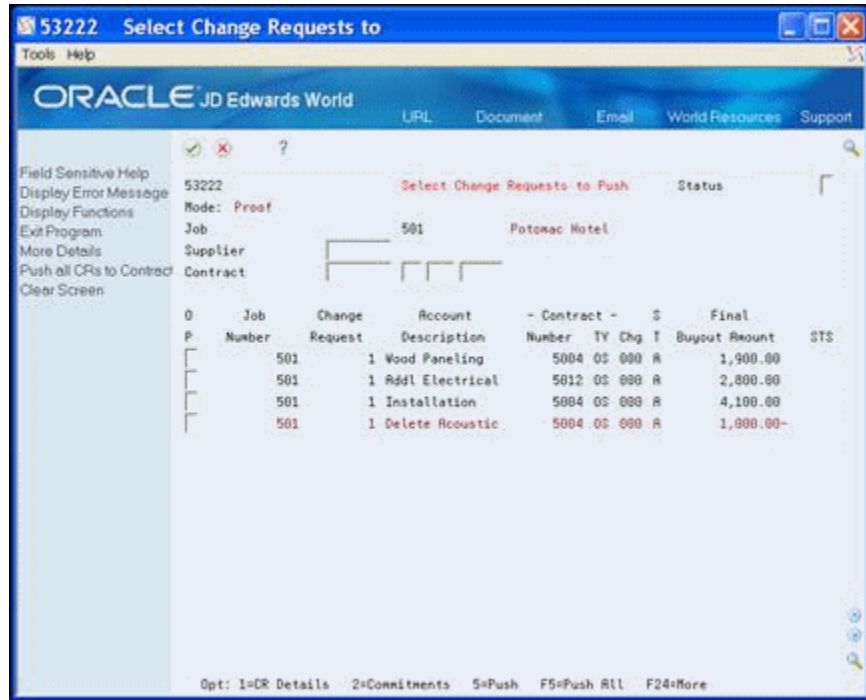
5. Perform one of the following:

   ■ Enter 5 in the Option field for each change request that you want to commit, and then click Enter.

   ■ Choose Push all CRs to Contract Mgmt (F5) if you want to commit all change requests.

8.1.2 Processing Options

See Section 16.3, "Select Change Req. to Push to Contracts (P53222)"

8.1.3 What You Should Know About

DREAM Writers	Description
DREAM Writer version processing options	If you enter DREAM Writer version numbers in the DREAM Writer Versions processing option, you might also need to set the processing options for those DREAM Writer versions.

8.2 Committing Change Requests to Contract Billing

You can copy the following information to the Contract Billing system:

■ Job number

■ Owner pay item

■ Description

■ Amount (final)

■ Quantity

- Unit price

- Unit of measure

- Pricing type

- Account information

- Revenue

When you commit a change request to the Contract Billing system, the Change Management system automatically creates the appropriate cross-reference information for the change request in the Contract Billing system. This includes the following items:

- Business Unit (Job)

- Subsidiary (Cost Code)

- Object (Cost Type)

- Subledger

The subledger is the change request number, and the subledger type is always J for job change request.

You can commit:

- All change requests

- Select change requests

To commit all change requests to Contract Billing

Navigation
From Change Management Processing (G53119), choose All Requests to Ctr Bill

Using this DREAM Writer, you can commit all change requests to the Contract Billing system. You can run this program in proof or final mode.

8.2.1 Processing Options

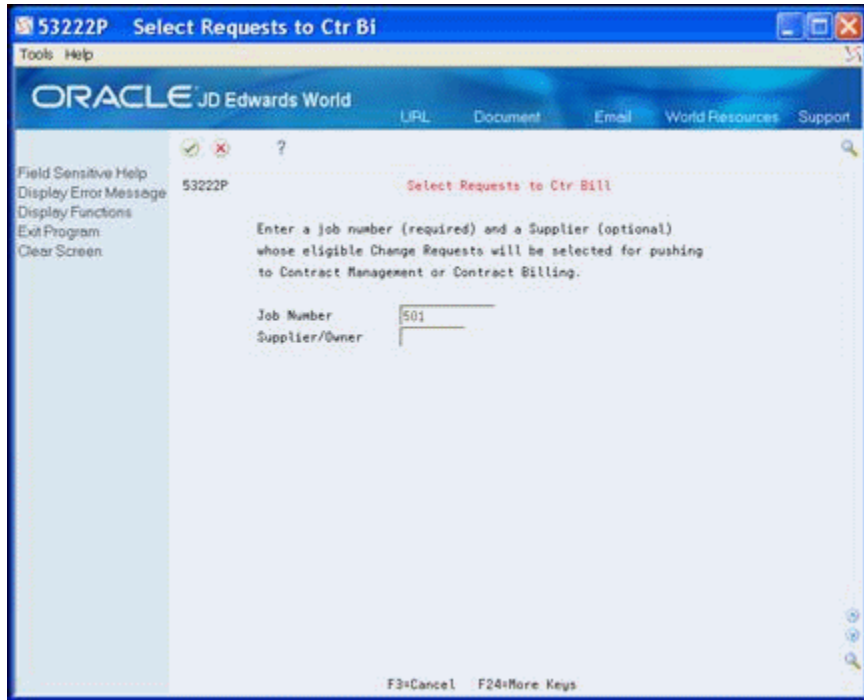See Section 16.4, "Push Change Request To Contract Billing (P53200)"

To commit select change requests to Contract Billing

Navigation
**From Change Management Processing (G53119), choose Select Requests to Ctr Bill**

1. On Select Requests to Ctr Bill, complete the following field:

   - Job Number

*Figure 8–4   Select Requests to Ctr Bill screen*

2. To narrow your search, complete the following optional field and click Enter:

   ■ Supplier/Owner

3. On the second Select Requests to Ctr Bill screen, enter Y in the Accept field and click Enter.

Figure 8–5   Select Requests to Ctr Bill, Second screen
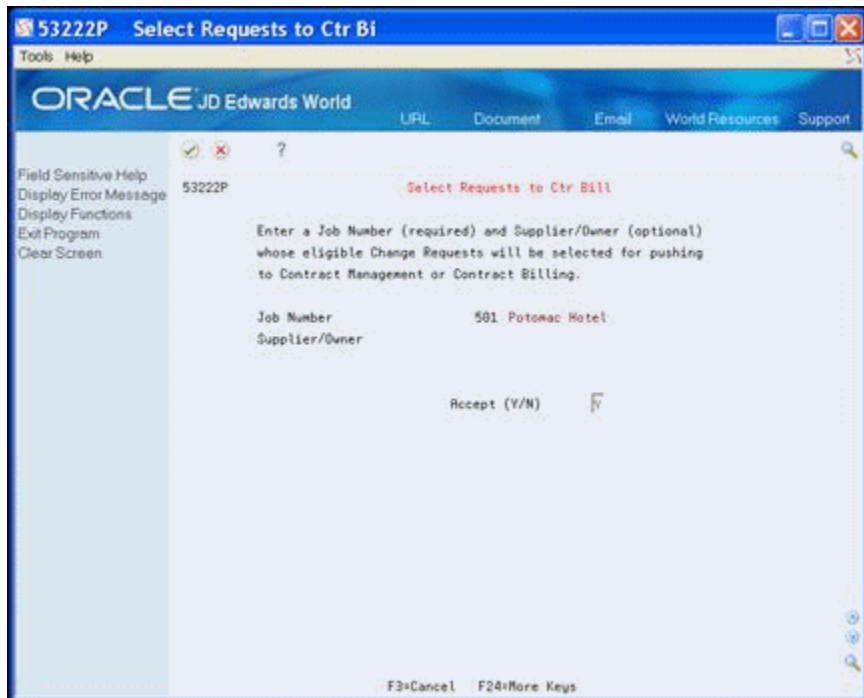
4. On Select Change Requests to Push, complete any of the following optional fields to narrow your search and then press Enter:

- Status
- Owner
- Contract
- Contract Type
- Order Change Number
- Order Company

Figure 8–6   Select Change Requests to Push screen
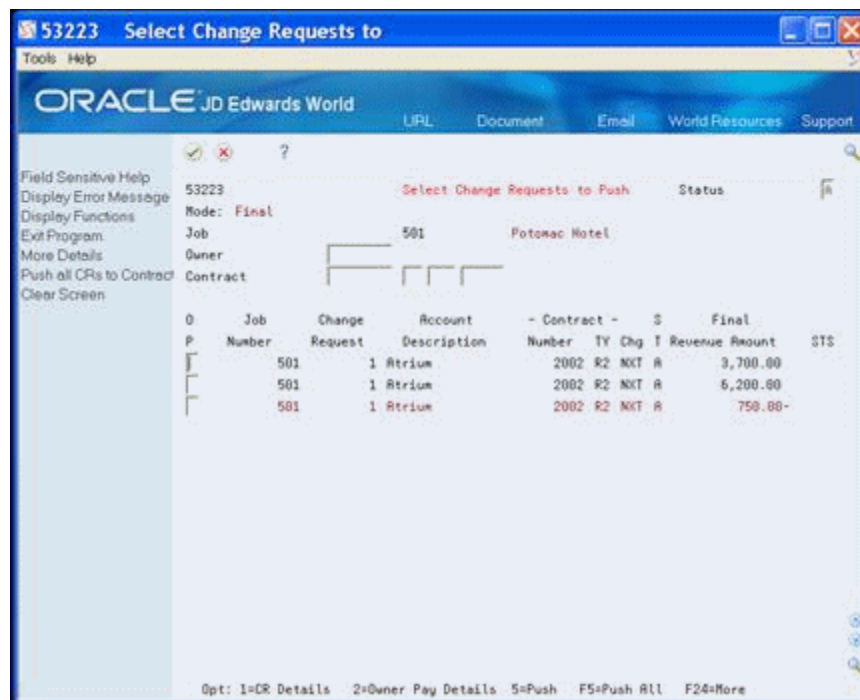
5. Perform one of the following:

- Enter 5 in the Option field for each change request that you want to commit, and then click Enter.
- Choose Push all CRs to Contract Billing (F5) if you want to commit all change requests.

8.2.2 Processing Options

See Section 16.5, "Select Change Req. to Push to Contracts (P53223)"

8.2.3 What You Should Know About

DREAM Writers	Description
DREAM Writer version processing options	If you enter DREAM Writer version numbers in the DREAM Writer Versions processing option, you might also need to set the processing options for those DREAM Writer versions.

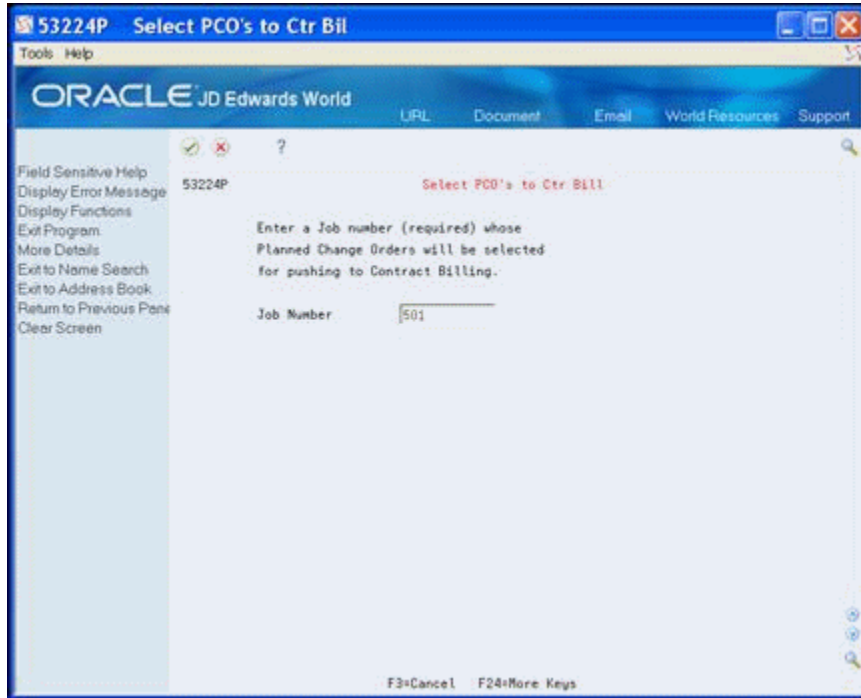## 8.3 Committing Selected Planned Change Orders to Contract Billing

You can also commit selected planned change orders to the Contract Billing system.
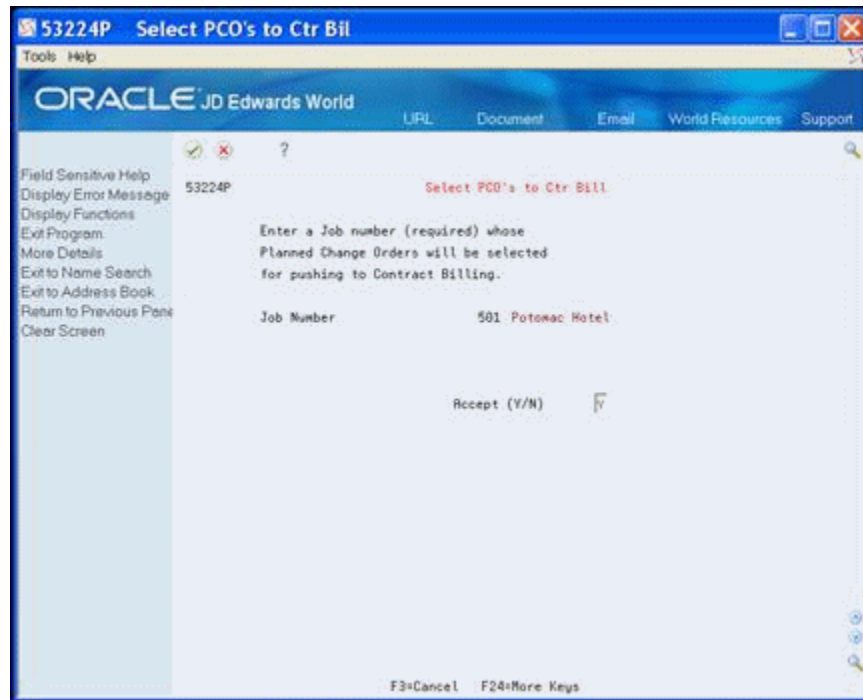
Navigation

From Change Management Processing (G53119), choose Select PCOs to Ctr Bill

1. On Select PCOs to Ctr Bill, complete the following field:

   - Job Number

Figure 8–7 Select PCOs to Ctr Bill screen

2. On the second Select PCOs to Ctr Bill screen, enter Y in the Accept field and click Enter.

Figure 8–8   Select PCOs to Ctr Bill screen

3. On Select PCOs to Push, complete the following optional field to narrow your search and then press Enter:

■   Status

Figure 8–9   Select PCOs to Push screen
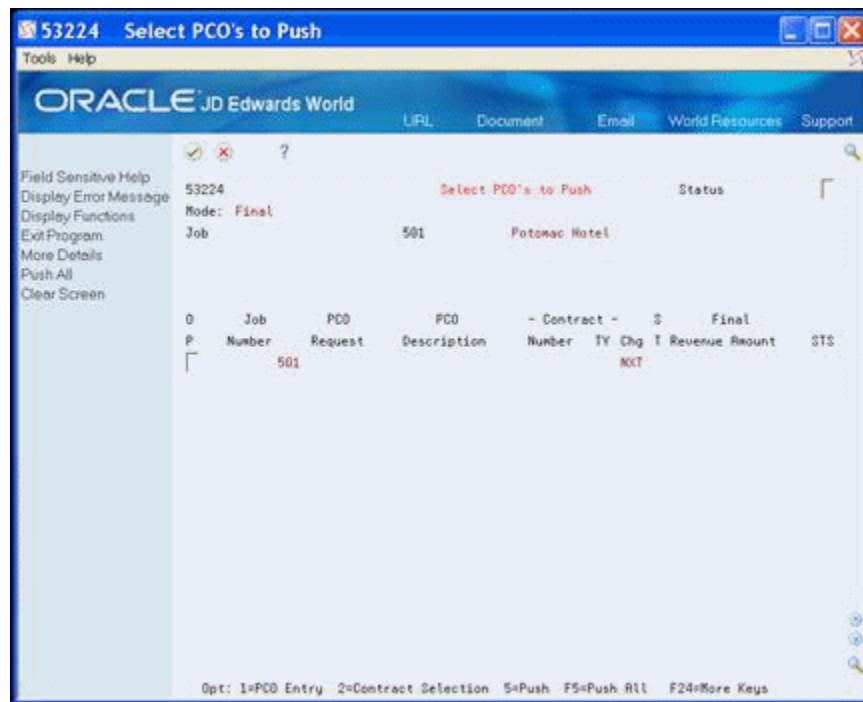
4. Perform one of the following:

- Enter 5 in the Option field for each planned change order that you want to commit, and then click Enter.

- Choose Push All (F5) if you want to commit all change requests.

8.3.1 Processing Options

See

8.3.2 What You Should Know About

DREAM Writers	Description
DREAM Writer version processing options	If you enter DREAM Writer version numbers in the DREAM Writer Versions processing option, you might also need to set the processing options for those DREAM Writer versions.

9

Review Change Management Data

This chapter contains these topics:

The Change Management system provides a number of ways which you can review change management data. You can review:

- All change requests associated with a job and whether each change request is attached to a planned change order and change order.

- All change requests, per word list, with the same cost code and cost type for a particular job.

- All change requests that are attached to contracts in the Subcontract Management and Contract Billing systems.

- Each change request for a particular job and the status of cost, revenue, and buyout information.

- All planned change orders for a job and which ones are attached to a change order.

- All change orders for a job.

9.1 Reviewing Change Requests

Navigation

From Change Management Processing (G53119), choose Manage Change Requests

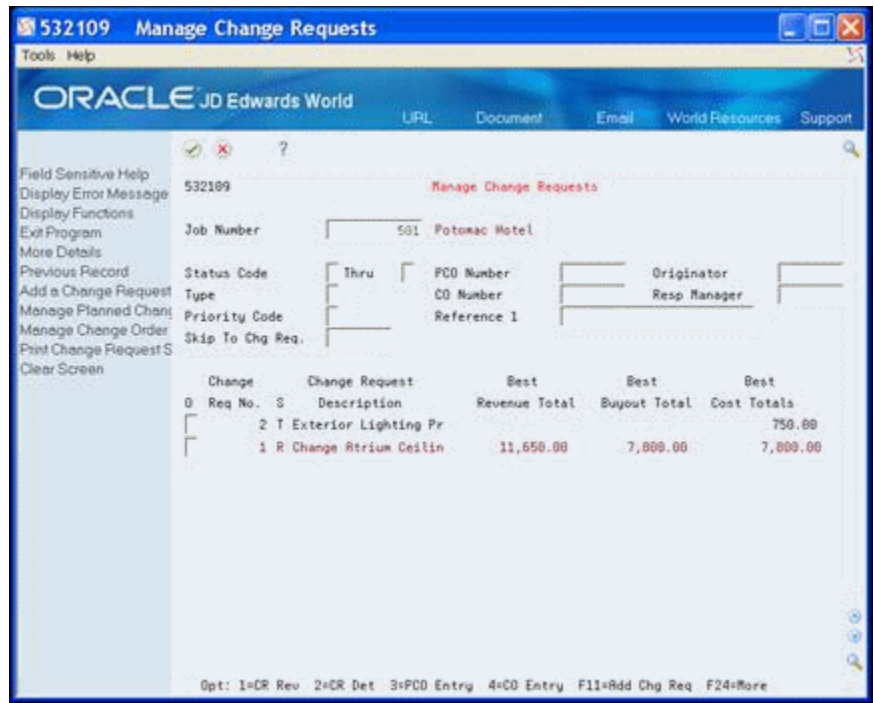This section discusses how to review change requests.

9.1.1 To Review Change Requests

The system stores change request information in the Change Request Master table (F5301).

1. On Manage Change Requests, complete the following field:

- Job Number

Figure 9–1   Manage Change Requests screen

2. To narrow your search, complete any combination of the following fields and click Enter:

- Status Code *

- Thru (Status Code) *

- PCO Number

- Originator

- Type *

- CO Number

- Responsible Manager

- Priority *

- Reference 1

Note: You use fields with an asterisk (*) in conjunction with another field.

Field	Explanation
Job Number	The number of the job, or project, that the change request is associated with. This number must be set up in the Business Unit Master table (F0006).

Field	Explanation
Status Code	This code indicates the status of the change request. It is for information only and is not attached to a ledger type. It should not be confused with the status codes that are defined in the Change Request Detail Status Update table (F53101).
Status Code Thru	The ending status code in a range of status codes for which you want information displayed.
PCO Number	A number that uniquely identifies a planned change order for a particular job in the Change Management system. The system also links the planned change order number to the change requests attached to the planned change order so you can identify the change requests that are associated with the planned change order.
Originator	The address book number of the person who originated the change request.
Type	A user defined code (53/TY) that indicates the type of change request.
CO Number	A number that uniquely identifies a change order for a particular job in the Change Management system. The system also links the change order number to the planned change orders that are attached to the change order so you can identify the planned change orders that are associated with the change order.
Resp Manager	The address book number of the person who approves the change request.
Priority Code	A user defined code that indicates the priority of the change request.
Reference 1	Any number used to identify a specific source document or originating entry that might be related to a change request.

9.1.2 Processing Options

See Section 16.7, "Change Request Search (P532109)"

9.2 Reviewing Change Requests by Cost Code and Cost Type

Navigation

From Change Management Processing (G53119), choose Change Management Inquiries

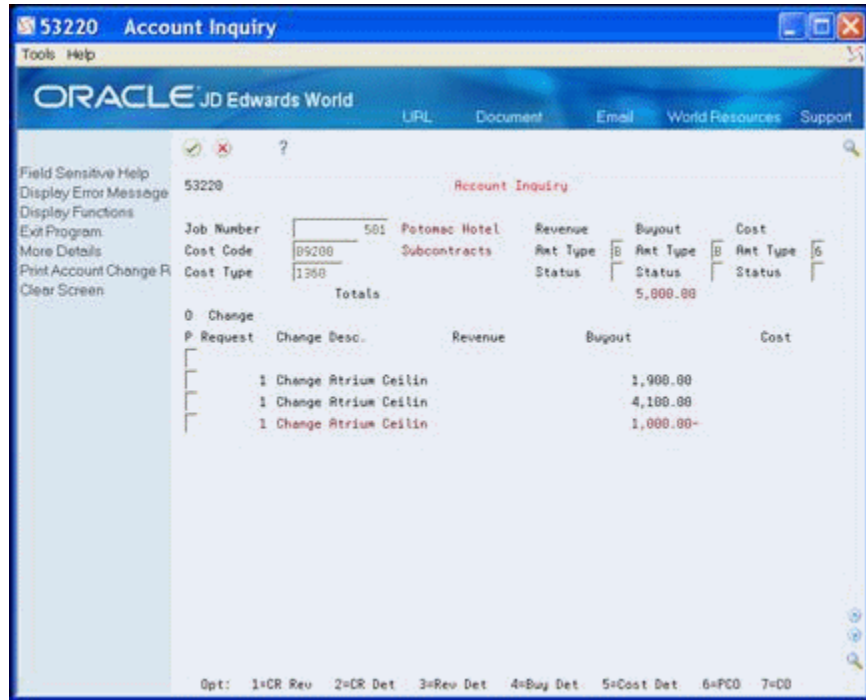**From Change Management Inquiries (G53139), choose Account Inquiry**

9.2.1 To Review Change Requests by Cost Code and Cost Type

For a particular job, you can review all change requests that have the same cost code and cost type.

On Account Inquiry, complete the following fields and click Enter.

- Job Number
- Cost Code
- Cost Type

Field	Explanation
Cost Code	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.
Cost Type	The portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories. For example, dividing labor into regular time, premium time, and burden.

9.2.2 Processing Options

See Section 16.8, "Account Change Request Inquiry (P53220)"

9.3 Reviewing Change Request Status Codes

Navigation

From Change Management Processing (G53119), choose Status Code Audit

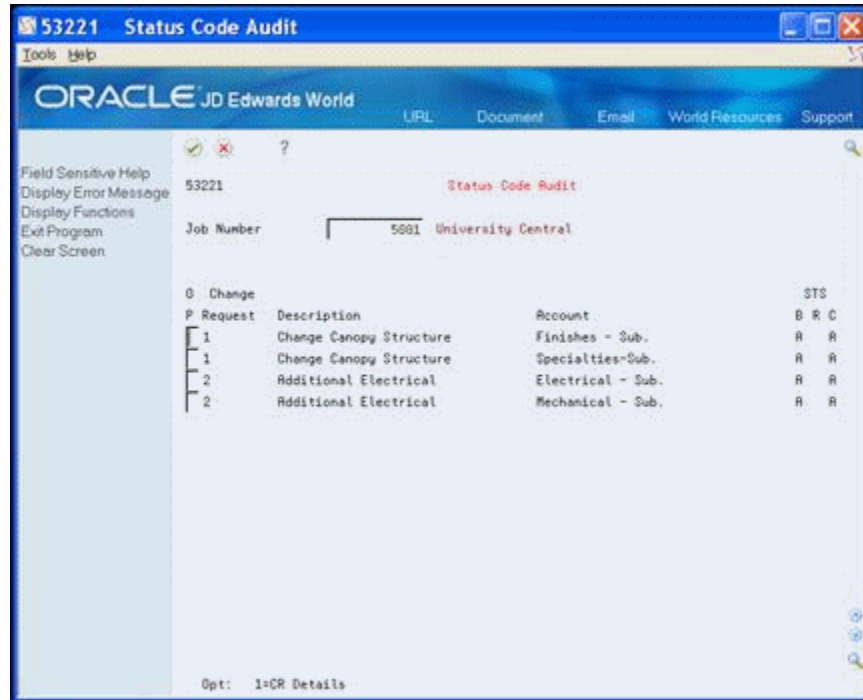This section discusses reviewing change request status codes.

9.3.1 To Review Change Request Status Codes

For each change request for a particular job, you can review the status for cost, revenue, and buyout information.

On Status Code Audit, complete the following field and click Enter.

Job Number

Figure 9–3   Status code Audit screen

9.3.2 Processing Options

See Section 16.9, "Status Code Audit (P53221)"

9.4 Reviewing Planned Change Orders

You can view all planned change orders for a job and determine which ones are attached to a change order.

Navigation

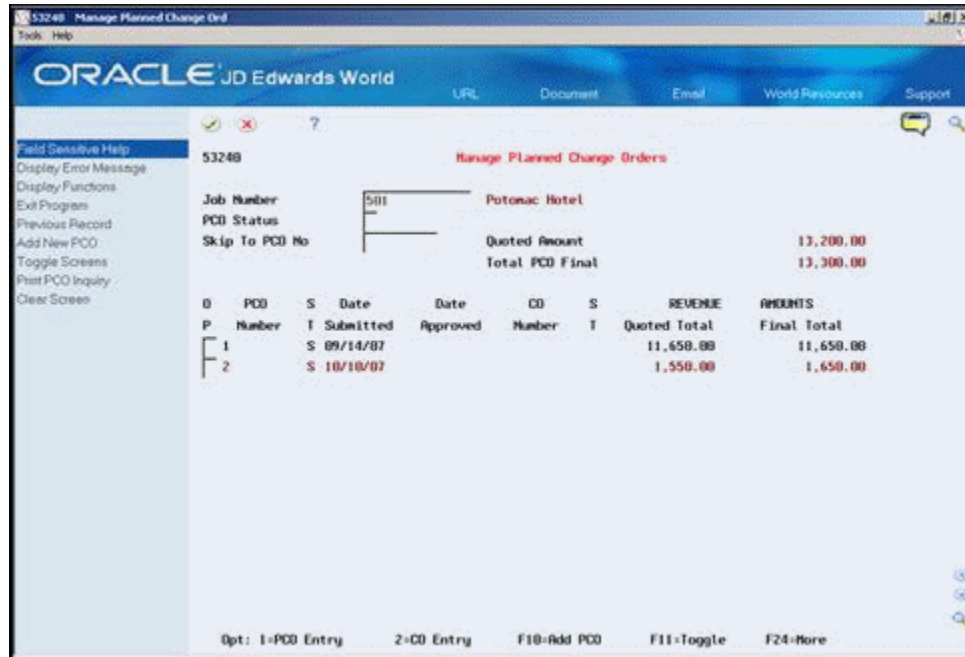**From Change Management Processing (G53119), choose Manage Planned Change Orders**

Alternatively, you can also access this screen by choosing Planned Change Order Inquiry from the Change Management Inquiries menu (G53139).

9.4.1 To Review Planned Change Orders

On Manage Planned Change Orders, complete the following field and click Enter.

- Job Number

Figure 9–4 Manage Planned Change Orders screen

If a planned change order is attached to a change order, the number of the change order appears in the CO Number field.

9.4.2 Processing Options

See Section 16.10, "Planned Change Order Inquiry (P53240)"

9.5 Reviewing Change Orders

Navigation

From Change Management Processing (G53119), choose Manage Change Orders

Alternatively, you can also access this screen by choosing Change Order Inquiry from the Change Management Inquiries menu (G53139).

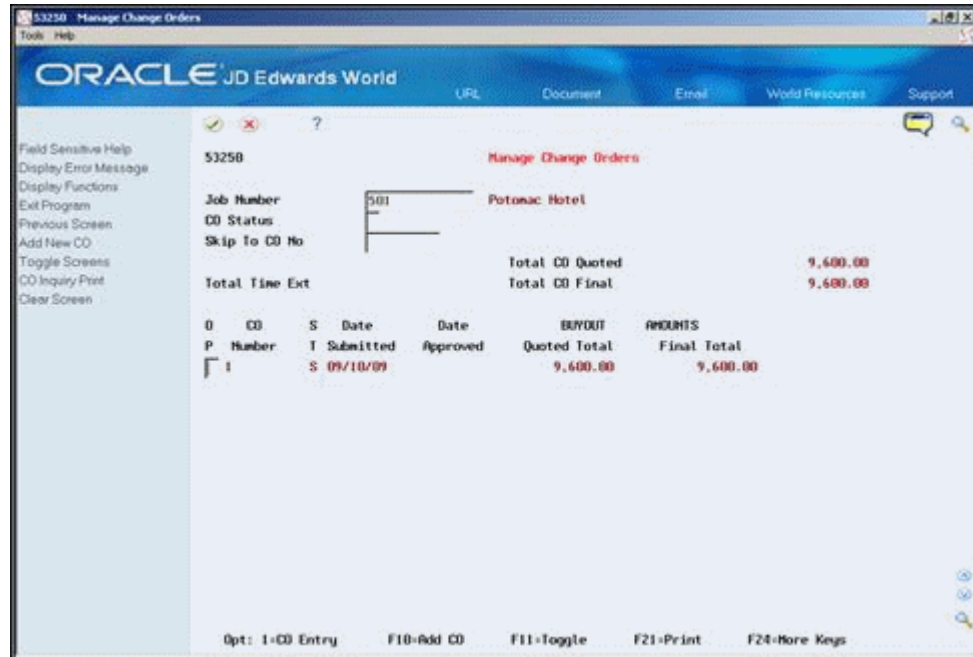### 9.5.1 To Review Change Orders

You can view all change orders for a job.

On Manage Change Orders, complete the following field and click Enter.

■ Job Number

Figure 9–5   Manage Change Orders screen

9.5.2 Processing Options

See Section 16.11, "Change Order Inquiry (P53250)"

9.6 Reviewing Change Requests Attached to Subcontracts

Navigation

From Change Management Processing (G53119), choose Change Management Inquiries

From Change Management Inquiries (G53139), choose Buyout Detail
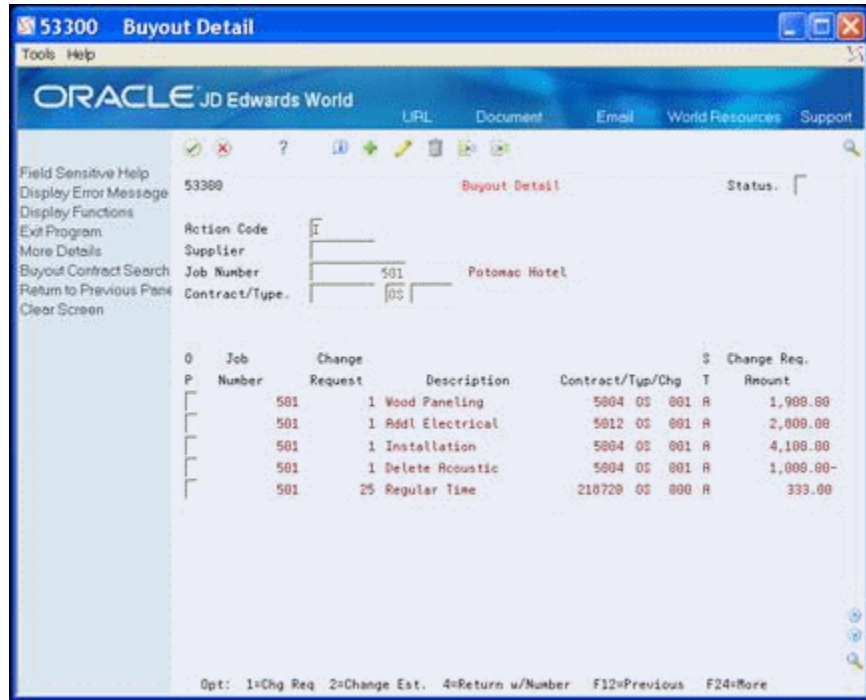
9.6.1 To Review Change Requests Attached to Subcontracts

You can view all change requests that are attached to contracts in the Subcontract Management system.

On Buyout Detail, complete the following field:

■   Job Number

Figure 9–6   Buyout Detail screen

9.6.2 Processing Options

See Section 16.12, "Change Request Inquiry - Buyout (P53300)"

9.7 Reviewing Change Requests in Contract Billing

Navigation

From Change Management Processing (G53119), choose Change Management Inquiries

From Change Management Inquiries (G53139), choose Revenue Detail

9.7.1 To Review Change Requests in Contract Billing

You can view all change requests that are attached to contracts in the Contract Billing system.

On Revenue Detail, complete the following field:

- Job Number

Figure 9–7   Revenue Detail screen

9.7.2 Processing Options

See Section 16.13, "Change Request Inquiry - Revenue (P53310)"

Part III

Reports

This part contains the following chapters:

- Chapter 10, "Overview to Reports"
- Chapter 11, "Print Reports"

10

Overview to Reports

This chapter consists of this topic:

- Section 10.1, "About Reports"

10.1 About Reports

The Change Management system includes reports for reviewing change requests, planned change orders, and change orders.

Change Management reports consist of the following:

- Change Request Index
- Change Request Summary
- Change Request Detail
- Log Report with Update

> **See Also:**
>
> - Understand DREAM Writer in the *JD Edwards World Technical Foundation Guide* for information about running, copying, and changing a DREAM Writer version

Print Reports

This chapter contains these topics:

You can print a variety of reports in the Change Management system.

11.1 Printing Change Request Index

Navigation

From Change Management Reports (G53129), choose Change Request Index

The Change Request Index report includes identifying information for the change requests you select. The system stores the information in the Change Request Master (F5301) and Change Request Detail Description (F53015) tables. If you set the Format Selection processing option to print amounts, the system retrieves those amounts from the Change Request Set Up File table (F5302).

Figure 11–1   Change Request Index Report

```
53400                              JD Edwards World                    Page      -      1
                                   Change Request Index                Date      -  5/05/17
Job Number . .        501    Potomac Hotel
  Change Original                                  Cost        Revenue
  Number   Date     Remark         Description     Estimate    Estimate    Reference    Reference 3
  ------ -------- --------------- ----------------- ---------- ----------- ---------- ------------
       1 10/25/17 Change to Oak P Change Atrium Ceiling    7,800.00   11,650.00  DACA-755637553-
                  Owner has requested pricing for changing the atrium ceiling
                  from acoustical tile to oak paneling.
       2 10/29/17                 Exterior Lighting Proposal           6,030.00  DRAWING #184-38
                  Track drawings for proposal to upgrade exterior lighting
                                                    -------------- ---------------
                                   Potomac Hotel    7,800.00   17,680.00
                                                    -------------- ---------------
                                   Grand Total      7,800.00   17,680.00
```

11.1.1 Processing Options

See

11.2 Printing Change Request Summary

Navigation

From Change Management Reports (G53129), under the Change Request Reports heading choose Change Request Summary

The Change Request Summary report lists summary information for the change requests you select including:

- Information you enter on Change Request Revisions and Change Request Details

- Information about documents and activities for change requests

The system stores this information in the following tables:

- Change Request Master (F5301)

- Change Request Set Up File (F5302)

- Log Master (F4303)

- Change Request Text (F53015)

Figure 11–2   Print Summary - Single Change Request Report

11.2.1 Processing Options

See Section 17.5, "Print Summary - Single Change Request (P5301P)"

11.3 Printing Change Request Detail

Navigation

From Change Management Reports (G53129), choose Change Request Detail

The Change Request Detail report lists the detail information for the change requests that you select. It displays the following:

- Change request

- Requote

- Cost, revenue, and buyout amounts

- Account information for each line item of the change request

The system stores this information in the Change Request Set Up File table (F5302).

Figure 11–3   Change Request Detail Report

```
53410                                JD Edwards World                      Page     -    1
                                   Change Request Detail                   Date     -  5/05/17

Business Unit.          5001 Main Terminal Building
  Change                                  S               S              S     Cost Account
  Number     Acct Description       Cost  T    Revenue    T    Buyout    T     Revenue Account
---------- ------------------- --------------- - --------------- - --------------- - ------------------------
      1 Change Request . . .
        Requote Number . . .
        1 Finishes - Sub.        125,000.00  A                                      5001 09000    1360
        1 Specialties-Sub.       307,000.00  A                                      5001 10000    1360
        1 Contract Billings                       472,000.00- A                     5001 90000    1380
        1 Finishes - Sub.                                          125,000.00  A
        1 Specialties-Sub.                                         307,000.00  A
                                 --------------- --------------- ---------------
        Requote Number . . .     432,000.00      472,000.00-      432,000.00
                                 --------------- --------------- ---------------
        Change Request . . .  1  432,000.00      472,000.00-      432,000.00



53410                                JD Edwards World                      Page     -    2
                                   Change Request Detail                   Date     -  5/05/17

Business Unit.          5001 Main Terminal Building
  Change                                  S               S              S     Cost Account
  Number     Acct Description       Cost  T    Revenue    T    Buyout    T     Revenue Account
---------- ------------------- --------------- - --------------- - --------------- - ------------------------
      2 Change Request . . .
        Requote Number . . .
        2 Electrical - Sub.      150,000.00  A                                      5001 16000    1360
        2 Mechanical - Sub.       50,000.00  A                                      5001 15000    1360
        2 Contract Billings                       253,000.00- A                     5001 90000    1380
        2 Electrical - Sub.                                        150,000.00  A
        2 Mechanical - Sub.                                         50,000.00  A
                                 --------------- --------------- ---------------
        Requote Number . . .     200,000.00      253,000.00-      200,000.00
                                 --------------- --------------- ---------------
        Change Request . . .  2  200,000.00      253,000.00-      200,000.00
                                 --------------- --------------- ---------------
        Job Number . . . . .  5001 632,000.00    725,000.00-      632,000.00
                                 --------------- --------------- ---------------
                      Final To    632,000.00     725,000.00-      632,000.00
```

11.4 Printing Log Report with Update

Navigation

From Change Management Reports (G53129), choose Log Report with Update

The Log Report with Update report lists information about documents and activities for the Change Management, Subcontract Management, and Contract Billing systems.

The system bases this report on data in the Log Master table (F4303), which the Change Management, Subcontract Management, and Contract Billing systems share.

Figure 11–4   Contract Log Report

```
44300                                JD Edwards World                      Page     -    1
                                    Contract Log Report                    Date     -  5/05/17
                                     Change Management
T                                          S   Issue    Expired  Required P Cde Cde Cde I  Carrier
Y       Description          Explanation   T   Date     Date     Date     E  1   2   3   C  Number    Carrier Name
-- ------------------- ------------------------- - -------- -------- -------- - --- --- --- - -------- ------------------
Business Unit. . . .        5001 Main Terminal Building
------------------- -----------  ------------------------
S  Signed Contract     Submit Signed Contract    06/01/17 06/30/17 06/15/17 Y
S  Proof of Insurance  Submit Insurance Certif.            07/31/17 07/15/17 Y
S  Schedule            Submit Progress Schedule            08/31/17 08/15/17 Y
T  Transmittal #1      Change Request: DataCable                             N
T  Transmittal #2      Proceed with Change #1                               N
```

11.4.1 Processing Options

See

11.4.2 Data Selection

Ensure the data selection you choose matches the setting in the Project Management View processing option. For example, if you set the processing option to the Change Management view, then choose Change Request rather than Contract Number in the data selection.

11.5 Printing Change Request Summary

Navigation

From Change Management Reports (G53129), under the New Change Request Reports heading choose Change Request Summary

The Change Request Summary report lists summary information for the change requests that you select. It displays change requests by job in either ascending or descending order, depending upon the version you select. It also displays planned change orders, change order numbers, and statuses for the change requests.

Use the processing options control whether:

- Original, quote, final, or best amounts display for cost, revenue, and buyouts
- Change request header text displays

The system stores the information in the following tables:

- Change Request Master (F5301)
- Change Request Detail Description (F53015)
- Planned Change Order Master (F5304)
- Change Order Master (F5305)

Figure 11–5 Change Management Summary Print

11.5.1 Processing Options

See Section 17.3, "CR Summary Print - Ascending / Text (P53401)"

11.6 Printing Details by Account

Navigation

From Change Management Reports (G53129), choose Details by Account

The Details by Account report lists original, quoted, and final amounts for each account on a change request. It also lists the best revenue and buyout amounts for the change request.

How you set the processing option controls whether the text from the change request header displays.

The system stores the information in the following tables:

- Change Request Master (F5301)
- Change Request Set Up File (F5302)
- Change Request Detail Description (F53015)
- Planned Change Order Master (F5304)
- Change Order Master (F5305)

Figure 11–6   Change Request Details by Account Report, partial page

Figure 11–7   Change Request Details by Account Report, right side

11.6.1 Processing Options

See Section 17.4, "Change Request Details by Account (P53402)"

11.7 Printing Details with Contract Data

Navigation

From Change Management Reports (G53129), choose Details with Contract Data

The Details with Contract Data report lists the original, quoted, and final amounts for change requests associated with contracts in Subcontract Management or Contract Billing. It includes the contract number and all accounts on each change request.

Figure 11–8   Details with Contract Data Report

```
534021                              JD Edwards World                        Page - . . .    1
                              Change Request Details /w Contract Info             Date - . . .  5/05/17
                                           By
                                    Buyout and Revenue
Job. . . . . .        501 Potomac Hotel                     Priority Code. . H High
Change Request .      2    Exterior Lighting Proposal       Status Code. . . A Approved Request
Origination. . . 10/29/17                                   Owner Change Req Y
PCO Number . . .      2    Exterior Lighting Proposal   Status . A Approved   Submitted. . 05/05/17  Approved . .
Change Order . .                                    Status .               Submitted. .           Approved . .
Best  Buyout . .
Best  Revenue. .      6,030.00
                                                                    T S N - - Contract Data - -
Account Type   Account Description      Original      Quoted       Final    O T P   Number  TY Chg  Co        O
------------   -------------------   ------------  ------------  ------------  - - -  ------- -- ---  -----  -----
Revenue        Walkways                 2,500.00      2,750.00     2,750.00   N A     2002 R2 000           Fishm
Revenue        Parking                  3,280.00      3,280.00     3,280.00   N A     2002 R2 000           Fishm
                                     ------------  ------------  ------------
Totals for . . :  00000002              5,780.00      6,030.00     6,030.00
                                     ------------  ------------  ------------
Totals for . . :        501             5,780.00      6,030.00     6,030.00
                                     ------------  ------------  ------------
Totals for . . :  Grand Totals          5,780.00      6,030.00     6,030.00
```

11.8 Printing Job PCO Summary

Navigation

From Change Management Reports (G53129), choose Job PCO Summary

The Job PCO Summary report lists original and quoted total amounts for cost, revenue, and buyouts for each change request associated with planned change order.

The system stores the information in the following tables:

- Change Request Master (F5301)
- Planned Change Order Master (F5304)
- Change Order Master (F5305)

Figure 11–9   Job PCO Summary Report

11.9 Printing Job PCO Detail

Navigation

From Change Management Reports (G53129), choose Job PCO Detail

The Job PCO Detail report lists original and quoted amounts for cost, revenue, and buyout for each account on the change requests associated with the planned change orders you select.

The system stores the information in the following tables:

- Change Request Master (F5301)

- Change Request Set Up File (F5302)

- Planned Change Order Master (F5304)

- Change Order Master (F5305)

Figure 11–10   Job PCO Detail Report, partial page

Figure 11–11   Job PCO Detail Report, right side

```
                                    Page - . . .   1
                                    Date - . . .   5/05/17
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
 Approved Amt .              Approved Amt .
─────────────────────────────────────────────────────────────────────────
     BUYOUT AMOUNTS              COST AMOUNTS
   Original      Quoted       Original       Quoted
 ------------- -----------  ------------- -------------
─────────────────────────────────────────────────────────────────────────
                                              1,900.00
─────────────────────────────────────────────────────────────────────────
             1,900.00
                                              2,800.00
─────────────────────────────────────────────────────────────────────────
             2,800.00
                                              4,100.00
─────────────────────────────────────────────────────────────────────────
             4,100.00
                                              1,000.00-
─────────────────────────────────────────────────────────────────────────
             1,000.00-
 ------------- -----------  ------------- -------------
             7,800.00                         7,800.00
 Best. . .   7,800.00     Best. . .     7,800.00

                                    Page - . . .   2
                                    Date - . . .   5/05/17
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
 Approved Amt .              Approved Amt .
─────────────────────────────────────────────────────────────────────────
     BUYOUT AMOUNTS              COST AMOUNTS
   Original      Quoted       Original       Quoted
 ------------- -----------  ------------- -------------
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
─────────────────────────────────────────────────────────────────────────
 ------------- -----------  ------------- -------------
 Best. . .                 Best. . .
 ------------- -----------  ------------- -------------
             7,800.00                         7,800.00
 Best. . .   7,800.00     Best. . .     7,800.00
```

11.10 Printing Job Planned Change Orders

Navigation

From Change Management Reports (G53129), choose Job Planned Change Orders

The Job Planned Change Orders report lists the quoted and approved cost, revenue, and buyouts amounts for each planned change order for jobs you select. Information displays in either ascending or descending order by planned change order or by the requested date, depending on the version you select.

The system stores the information in the following tables:

- Change Request Master (F5301)

- Planned Change Order Master (F5304)

- Change Order Master (F5305)

Figure 11–12   Job Planned Change Orders Report

Figure 11–13   Job Planned Change Orders Report, right side

11.11 Printing Job CO Summary

Navigation

From Change Management Reports (G53129), choose Job CO Summary

The Job CO Summary report lists the planned change order approved, quoted, and final total amounts for cost, revenue, and buyouts. The system sorts the information by change order and then planned change order.

The system stores the information in the following tables:

- Change Request Master (F5301)

- Planned Change Order Master (F5304)

- Change Order Master (F5305)

Figure 11–14   Job CO Summary Report, partial page

```
   53405
.  .  .    1
                                                                          Job
Date -  .  .  .   5/05/17
```

```
Job Number .  .  .           501 Potomac Hotel              Approved Date. .
CO Number.  .  .  .                                         Extend Days. .  .
CO Status.  .  .  .
Submitted Date .
```

```
    PCO                        S REVENUE              REVENUE AMOUNTS
AMOUNTS
    Number      Description    T PCO Approved    Quoted Total    Final Total
Final Total
    --------  ---------------------------------  -  ---------------  ---------------  ---------------
----------------
        2 Exterior Lighting Proposal    A       6,030.00        6,030.00        6,030.00
                                                ---------------  ---------------  ---------------
----------------
    Totals:                                     6,030.00        6,030.00        6,030.00
                                                      Post         6,030,00
```

Figure 11–15   Job CO Summary Report, right side

```
JD Edwards World                                                Page -

Change Order Summary Report
```

```
                Revenue Approved
                Buyout Approved.
                Cost Approved. .
```

```
BUYOUT                BUYOUT AMOUNTS         COST                    COST

PCO Approved    Quoted Total    Final Total    PCO Approved    Quoted Total
-  ---------------  ---------------  ---------------    ---------------  ---------------

-  ---------------  ---------------  ---------------    ---------------  ---------------

        Post                                             Post
```

11.12 Printing Job CO Details

Navigation

From Change Management Reports (G53129), choose Job CO Details

The Job CO Details report lists the planned change order approved, quoted, and final total amounts for cost, revenue, and buyouts. The system displays detail information for change requests.

The system stores the information in the following tables:

- Change Request Master (F5301)
- Planned Change Order Master (F5304)
- Change Order Master (F5305)

Figure 11–16 Job CO Details Report, partial page

Figure 11–17 Job CO Details Report, right side

```
BUYOUT                COST AMOUNTS

PCO Approved    Quoted Total    Final Total

--------------   ---------------  --------------



--------------   ---------------  --------------


                     DEST
```

11.13 Printing Job Change Orders

Navigation

From Change Management Reports (G53129), choose Job Change Orders

The Job Change Orders report lists the quoted and final total amounts and approved amounts for cost, revenue, and buyouts by change order. Information displays in either ascending or descending order by change order or by the requested date, depending on the version you select.

The system stores the information in the following tables:

- Change Request Master (F5301)
- Planned Change Order Master (F5304)
- Change Order Master (F5305)

Figure 11–18   Job Change Order List Report, partial page

```
  53450                                                JD Edwards World
Page - . . .    1
                                                       Job Change Order List
Date - . . .  5/05/17

                                                                        By
                                                       Change Order Number - Ascending



  Job Number . . .        501 Potomac Hotel


    CO                    S   Date     Date     - - - - - - REVENUE AMOUNTS - - - - - -        - - - - -
AMOUNTS - - - - - - - -
    Number     Description    T Submitted Approved  Quoted Total   Final Total   Approved Amount Quoted Total
Total      Approved Amount

    --------  -----------------------  -  --------  --------  ----------------  ----------------  ----------------  ----------------
---------  ----------------
       1                    S 12/15/17
       2 Exterior Lighting Prop S 12/15/17                6,030.00         6,030.00         6,030.00
                                               ----------------  ----------------  ----------------  ----------------
--------  ----------------
    Totals for:        501 Potomac Hotel                 6,030.00         6,030.00         6,030.00
                                          Dan+          6 030 00                        Dan+
```

Figure 11–19   Job Change Order List Report, right side

```
BUYOUT AMOUNTS    - - - - - -        - - - - - COST

  Final Total       Approved Amount Quoted Total      Final

  ---------------  ----------------  ----------------  ------

  ---------------  ----------------  ----------------  ------


                    Dan+
```

Part IV

System Setup

This part contains these chapters:

-
-
-

12

Overview to System Setup

This chapter contains this topic:

-

12.1 Overview

Before you use the Change Management system, you need to define certain information that the system uses during change request processing. You customize this information so it suits your business needs.

System setup includes:

- Setting up user defined codes
- Setting up status codes

You customize user defined codes to suit your business needs. For example, you define the priority, type, and statuses for these codes. You also define job-specific user defined codes.

You define the status codes for each step in the approval process for change requests.

13

Set Up User Defined Codes

This chapter contains this topic:

- Section 13.1, "Setting Up User Defined Codes"

13.1 Setting Up User Defined Codes

You can use the following user defined codes (UDC) as part of the identifying information of a change request. These are for informational purposes only. The system stores this information in the User Defined Codes table (F0005).

UDC	Description
Change request status (53/ST)	Use this code on Change Request Revisions to indicate the overall status of the change request. This code has no impact on the ledger types. Do not confuse this with status codes defined on the Status Code Update Table.
Priority (53/PR)	Use these codes to track the urgency of a change request.
Type (53/TY)	Use these codes to help define the change request.
Category codes (53/01-06)	Use these codes to generate selective reporting based on user assigned values.
Planned Change Order Status (53/PC)	Use this code to indicate the status of a planned change order.
Change Order Status (53/CS)	Use this code to indicate the status of a change order.

Navigation

From Change Management Processing (G5311), enter 29

From Change Management System Setup (G53419), under the User Defined Codes Heading choose a menu selection

See Work with User Defined Codes in the Technical Foundation Guide for information about setting up and maintaining user defined codes.

14

Set Up Status Codes

This chapter contains this topic:

-

14.1 Setting Up Status Codes

You must set up status codes for the approval process before you can enter account distribution information for change requests. For each status code, you specify the following:

- The type of information (cost, revenue, or buyout) with which you can use the code.

- The amount and unit ledger types that the system updates in the Account Balances (F0902) and Account Ledger (F0911) tables.

- The type of amounts and quantities (original, quoted, final, or best) that the system displays and updates in the Change Request Set Up File table (F5302)

> **Note:** You use these status codes in the detail area on Change Request Details. They do not relate to the status code (UDC 53/ST) on Change Request Revisions, which is for informational purposes only.

To set up status codes

Navigation

From Change Management Processing (G5311), enter 29

From Contract Management System Setup (G53419), choose Status Code Update Table

1. On Status Code Update Table, complete the following fields for each status code:

   - Status

   - Status Record Type

   - Status Description

Figure 14–1   Status Code Update Table screen
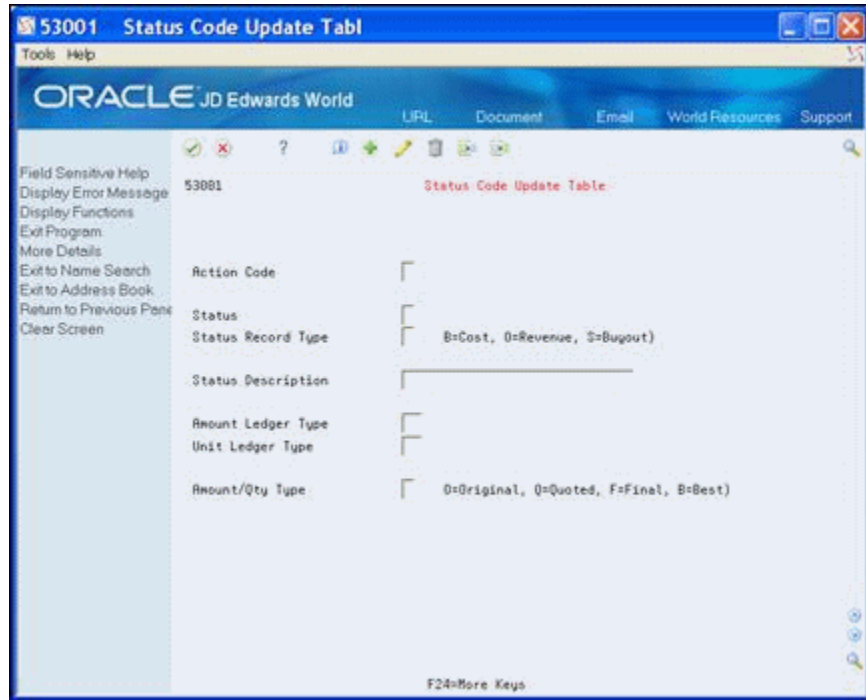
2. Complete any of the following optional fields:

    ■   Amount Ledger Type

    ■   Unit Ledger Type

    ■   Amount/Quantity Type

    > **Note:**   If you define either an amount or unit ledger type, you must
    > also define the other.

Field	Explanation
Status	A code defined by the user that specifies the status of a change request for a selected job and line item. This code is used in the approval process of the change request. It determines which ledger type is updated in the Account Balances table (F0902).
Status Record Type	The record type associated with change request detail information. Each change request can attach to multiple change items. Valid codes are: B – Budget, or Cost O – Owner, or Revenue S – Subcontract, or Buyout If you leave this field blank, the system supplies the default value of B.
Status Description	A user defined name or remark. *Screen-specific information* A description of the status code.

Field	Explanation
Amount Ledger Type	A user defined code (system 09, type LT) that identifies the ledger to which you are posting amounts, such as BA (Budget Ledger) or FE (Field Estimate). You can set up multiple, concurrent ledgers within the general ledger to establish an audit trail.
	Note: You cannot make journal entries directly to a ledger if the second letter of the ledger type is U (units).
	Screen -specific information
	This is the ledger type to be used to update amounts in the Account Balances table (F0902) and Account Ledger table (F0911) when the status code is used on the Change Request Details form and a valid account is entered. You can use this ledger type for FASTR and job cost reporting. This field is not required.
	Do not specify ledger types for status codes that represent early stages of the approval process and thus are not intended to affect the general ledger.
	If you enter an amount ledger type, you must also enter a unit ledger type.
	You can not use the following ledger types from the Job Cost system:
	▪ AA
	▪ HA
	▪ IA
	▪ PA
	▪ RA
	▪ F%
	▪ H%

Field	Explanation
Unit Ledger Type	A user defined code (system 09, type LT) that identifies a unit ledger, such as BU (Budget Units) or AA (Actual Units). You can set up multiple, concurrent ledgers within the general ledger to establish an audit trail.
	When you enter a transaction including units, the system automatically posts the units to the corresponding ledger type with U as the second character. For example if the ledger type for the amount is AA, and you post a transaction including both dollars and units, the system posts the dollars to ledger type AA and the units to ledger type AU. You cannot make journal entries directly to a ledger with a unit ledger type.
	If you locate a unit ledger type, the system displays the corresponding amount ledger type.
	Screen -specific information
	This is the ledger type to be used to update units in the Account Balances table (F0902) and Account Ledger table (F0911) when the status code is used on the Change Request Details form and a valid account is entered. You can use this ledger type for FASTR and job cost reporting. This field is not required.
	Do not specify ledger types for status codes that represent early stages of the change request process and thus are not intended to affect the general ledger.
	If you enter a unit ledger type, you must also enter an amount ledger type.
	You can not use the following ledger types from the Job Cost system:
	■ AU
	■ HU
	■ IU
	■ PU
	■ F%
	■ H%
Amount/Qty Type	A code that specifies which amounts and quantities in the Change Request Details table (F5302) will be updated. Valid codes are:
	O – Original
	Q – Quoted
	F – Final
	B – Best

What You Should Know About

Status Codes	Description
Deleting a status code	After you add a status code in the Change Request Details program, you cannot delete the status code from the system.
Changing a status code	After you add a status code in the Change Request Details program, you can change only the description of the status code.

Part V

Processing Options

This part contains these chapters:

15

Change Request Processing Options

This chapter contains these topics:

15.1 Change Request Revisions (P53019)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. Enter the default value for Owner Change Required. If left blank, 'N' will be used.	
2. Enter default value to determine how the Buyout, Revenue and Cost totals are calculated:	
'O' or '1' = Original Amounts	
'Q' or '2' = Quoted Amounts	
'F' or '3' = Final Amounts	
'B' or '4' = Best Amounts	
If left blank, Best Amounts will be used.	
VERSION IDs:	
3. Enter the version to be used for Change Request Details (P53029). If left blank, ZJDE0001 will be used.	

15.2 Change Request Detail (P53029)

Processing Option	Processing Options Requiring Further Description
EDIT OPTION:	
1. Enter "1" to require account numbers and dates. Leave blank to require them only if the status code is attached to a ledger type.	
AUDIT TRAIL CREATION SELECTION:	

Processing Option	Processing Options Requiring Further Description
2. Select one of the following:	
"1" = Create multiple audit trail records (F0911s).	
"2" = Create no F0911s.	
Blank = Create F0911s per period change.	
DEFAULT OPTIONS:	
3. Enter "1" to default the G/L date to today's system date. Leave blank to default the date from the Company Fiscal Date Patterns.	
4. Enter the Level of Detail (LOD) to default in the Account Pick Window (P53AW) when it is accessed thru function key selection. Leave blank to default LOD "9".	
5. Enter "1" to default the change number into the account's subledger field with a subledger type of "J" when cost, revenue and buyout details are added.	
6. Enter a default value to determine how totals will be calculated:	
'O' or '1' = Original Amounts 'Q' or '2' = Quoted Amount 'F' or '3' = Final Amount 'B' or '4' = Best Amount (default if left blank)	
REVENUE BUCKETS:	
7. When applicable, how are Revenue Amounts to be updated from Buyout Amounts?	
- If Revenue Amounts are not updated, enter '0'	
- If Revenue Amount = Buyout Amount, enter '1'	
- If Revenue Original = Best Buyout, enter '2'.	
8. Enter a '1' to display a Popup window when Revenue and Buyouts are not equal.	
COST BUCKETS:	
9. When applicable, how are Cost Amounts to be updated from Buyout Amounts?	
- If Cost Amounts are not updated enter '0'	
- If Cost Amounts = Buyout Amounts enter '1'	
- If Cost Original = Best Buyout Enter '2'	
10. Enter a '1' to display a Popup window when Cost and Buyouts are not equal.	
CHANGE ORDER PROGRAM VERSIONS:	
11. Enter the version to be used for PCO Entry. If left blank, ZJDE0001 will be used.	
12. Enter the version to be used for CO Entry. If left blank, ZJDE0001 will be used.	
COPY CHANGE REQUEST HEADER TEXT:	
13. Enter '1' to copy Change Request Header Text to Change Request Details. If left blank, no copy will be done.	
RETURN CONTRACT NUMBER:	

Processing Option	Processing Options Requiring Further Description
14. Enter '1' to return Contract Number and Type from the Account Selection window. If left blank. no Contract Number will be returned.	
PCO NUMBER ON AUTO CREATE:	
15. Enter'1' to use the Change Request Number as the PCO number.	
Enter '2' to use the Next Number. If left blank, the Change Request Number is used.	
VIDEO FORMAT CONTROL:	
16. Enter the desired screen order.	
Key in the order by entering a 1 for the first screen, 2 for second and 3 for third. If left blank the screen will not appear.	
- Buyout/Subcontractor - Revenue/Owner - Cost/Budget	
17. Enter "1" for Cost/Budget entry with manual cost code/cost type input. NOTE: This will override any values entered for PO#16 above.	
DEFAULT ROW DESCRIPTION:	
18. If PO#17 = 1, specify how to populate the row description for rows where description is blank.	
"1" - account detail description	
blank - use the Change Request header description.	
PBCO EDIT:	
19. Specify how to handle PBCO change dates.	
"1" = PBCO is a warning only. "2" = PBCO is not a warning or error. Blank = Edit PBCO as per the financial system constants (default).	

16

Approvals Processing Options

This chapter contains these topics:

16.1 Change Request Detail (P53029)

Processing Option	Processing Options Requiring Further Description
EDIT OPTION:	
1. Enter "1" to require account numbers and dates. Leave blank to require them only if the status code is attached to a ledger type.	
AUDIT TRAIL CREATION SELECTION:	
2. Select one of the following:	
"1" = Create multiple audit trail records (F0911s).	
"2" = Create no F0911s.	
Blank = Create F0911s per period change.	
DEFAULT OPTIONS:	
3. Enter "1" to default the G/L date to today's system date. Leave blank to default the date from the Company Fiscal Date Patterns.	

Processing Option	Processing Options Requiring Further Description
4. Enter the Level of Detail (LOD) to default in the Account Pick Window (P53AW) when it is accessed thru function key selection. Leave blank to default LOD "9".	
5. Enter "1" to default the change number into the account's subledger field with a subledger type of "J" when cost, revenue and buyout details are added.	
6. Enter a default value to determine how totals will be calculated: 'O' or '1' = Original Amounts 'Q' or '2' = Quoted Amount 'F' or '3' = Final Amount 'B' or '4' = Best Amount (default if left blank)	
REVENUE BUCKETS:	
7. When applicable, how are Revenue Amounts to be updated from Buyout Amounts? - If Revenue Amounts are not updated, enter '0' - If Revenue Amount = Buyout Amount, enter '1' - If Revenue Original = Best Buyout, enter '2'.	
8. Enter a '1' to display a Popup window when Revenue and Buyouts are not equal.	
COST BUCKETS:	
9. When applicable, how are Cost Amounts to be updated from Buyout Amounts? - If Cost Amounts are not updated enter '0' - If Cost Amounts = Buyout Amounts enter '1' - If Cost Original = Best Buyout Enter '2'	
10. Enter a '1' to display a Popup window when Cost and Buyouts are not equal.	
CHANGE ORDER PROGRAM VERSIONS:	
11. Enter the version to be used for PCO Entry. If left blank, ZJDE0001 will be used.	
12. Enter the version to be used for CO Entry. If left blank, ZJDE0001 will be used.	
COPY CHANGE REQUEST HEADER TEXT:	
13. Enter '1' to copy Change Request Header Text to Change Request Details. If left blank, no copy will be done.	
RETURN CONTRACT NUMBER:	
14. Enter '1' to return Contract Number and Type from the Account Selection window. If left blank. no Contract Number will be returned.	
PCO NUMBER ON AUTO CREATE:	
15. Enter'1' to use the Change Request Number as the PCO number. Enter '2' to use the Next Number. If left blank, the Change Request Number is used.	
VIDEO FORMAT CONTROL:	

Processing Option	Processing Options Requiring Further Description
16. Enter the desired screen order.	
Key in the order by entering a 1 for the first screen, 2 for second and 3 for third. If left blank the screen will not appear.	
- Buyout/Subcontractor - Revenue/Owner - Cost/Budget	
17. Enter "1" for Cost/Budget entry with manual cost code/cost type input. NOTE: This will override any values entered for PO#16 above.	
DEFAULT ROW DESCRIPTION:	
18. If PO#17 = 1, specify how to populate the row description for rows where description is blank.	
"1" - account detail description	
blank - use the Change Request header description.	
PBCO EDIT:	
19. Specify how to handle PBCO change dates.	
"1" = PBCO is a warning only. "2" = PBCO is not a warning or error. Blank = Edit PBCO as per the financial system constants (default).	

16.2 Push Change Request (P53199)

Processing Option	Processing Options Requiring Further Description
Proof or Final Mode:	
1. Enter a '1' to run in Final Mode.	
Leave blank to run in Proof Mode.	
Change Order:	
2. Enter the Change Order Number, (SFXO), For all the Change Requests to be pushed to. If left blank then the next change order number will be used.	
Status Codes:	
3. Enter the status to update the Change Request to when the request has been pushed to Contract Management.	
Log Revisions:	
4. Enter the Log Type to be used when creating Contract Log Revisions.	
5. Enter the Pay Effect (Y/N) flag to be used when creating Contract Log Revisions.	

16.3 Select Change Req. to Push to Contracts (P53222)

Processing Option	Processing Options Requiring Further Description
CHANGE ORDER:	

Processing Option	Processing Options Requiring Further Description
1. To select a specific Change Order Number to be used for the Push, Verify the Dream Writer Version being used for P53199.	The Change Order processing option for Push Change Requests To Contract Management Print (P53199) allows you to specify a change order number. If you leave this processing option blank, the program uses the next change order number.
DEFAULT VALUES FOR FILTERS:	
The following fields are used as filters in selecting Change Requests to be displayed. Enter default values to be used in this selection.	
1. Status Code	
2. Job Number	
3. Supplier	
4. Contract	
5. Enter up to 10 Change Request Statuses that are eligible for the Push to Contract management.	Enter the status values with no spaces or other characters separating the values.
DREAM Writer Versions	
Enter the Version IDs that will be used when the following programs are executed. If left blank, ZJDE0001 is used.	
6. Push CRs to Cont. Mgmt. (P53199)	
7. Change Request Details (P53029)	
8. Commitment Revisions (P4402)	

16.4 Push Change Request To Contract Billing (P53200)

Processing Option	Processing Options Requiring Further Description
Proof or Final Mode:	
1. Enter a '1' to run in Final Mode.	
Leave blank to run in Proof Mode.	
Change Order:	
2. Enter the Change Order Number, (COCH), For all the Change Requests to be pushed to. If left blank then the next change order number will be used.	
Status Codes:	
3. Enter the status to update the Change Request to when the request has been pushed to Contract Billing.	

16.5 Select Change Req. to Push to Contracts (P53223)

Processing Option	Processing Options Requiring Further Description
CHANGE ORDER:	
1. To select a specific Change Order Number to be used for the Push, Verify the Dream Writer Version being used for P53200.	

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES FOR FILTERS:	
The following fields are used as filters in selecting Change Requests to be displayed. Enter default values to be used in this selection.	
1. Status Code	
2. Job Number	
3. Owner	
4. Contract	
5. Enter up to 10 Change Request Statuses that are eligible for the Push to Contract Billing.	
DREAM Writer Versions Enter the Version IDs that will be used when the following programs are executed. If left blank, ZJDE0001 is used.	If you enter DREAM Writer version numbers in the DREAM Writer Versions processing option, you might also need to set the processing options for those DREAM Writer versions
6. Push CRs to Cont. Billing (P53200)	
7. Change Request Details (P53029)	
8. Owner Pay Item Details (P5202)	

16.6 Change PCO (P53224)

Processing Option	Processing Options Requiring Further Description
PROOF OR FINAL MODE:	
1. Enter a '1' to run in Final Mode. Leave blank to run in Proof Mode.	
DEFAULT VALUES FOR FILTERS:	
The following field is used as a filter in selecting the Planned Change Order to be displayed. Enter the default value to be used in this selection.	
2. Status Code	
CHANGE ORDER:	
3. Enter the Change Order Number, (COCH), for all the Planned Changed Orders to be pushed to. If left blank then the next change order number will be used.	
G/L ACCOUNT:	
4. Enter the G/L account to be associated with the Planned Change Order when pushed to Contract Billing **Note:** All attached change requests will be written to the Cross Reference file with their individual account number. (THIS IS A REQUIRED FIELD) Object: Subsidiary:	
STATUS CODES:	
5. Enter the status to update the Change Request to when the request has been pushed to Contract Billing.	

Processing Option	Processing Options Requiring Further Description
6. Enter the status to update the PCO to when the request has been pushed to Contract Billing.	
DREAM WRITER VERSIONS: Enter the Version IDs that will be used when the following programs are executed. If left blank ZJDE0001 is used.	If you enter DREAM Writer version numbers in the DREAM Writer Versions processing option, you might also need to set the processing options for those DREAM Writer versions.
7. Planned Change Order Entry (P5304)	
8. Owner Pay Item Details (P5202)	

16.7 Change Request Search (P532109)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES FOR FILTERS: The following fields are used as filters in selecting Change Requests to be displayed. Enter default values to be used in this selection.	
1. Status Code Range - From Status	
2. Status Code Range - To Status	
3. Change Request Type	
4. Change Request Priority	
5. PCO Number	
6. CO Number	
7. Reference 1	
8. Originator	
9. Responsible Manager	
DEFAULT VALUES FOR AMOUNTS: Enter a default value to determine how Buyout and Revenue Totals are calculated. If left blank, Best Amounts will be used. 'O' or '1' = Original Amounts 'Q' or '2' = Quoted Amounts 'F' or '3' = Final Amounts 'B' or '4' = Best Amounts	
10. Buyout Total	
11. Revenue Total	
12. Cost Total	
DREAM WRITER VERSION IDS: Enter the Version IDs that will be used when the following programs are executed. If left blank, ZJDE0001 will be used.	
13. Change Request Revisions (P53019)	
14. Change Request Details (P53029)	
15. PCO Entry (P5304)	

Processing Option	Processing Options Requiring Further Description
16. CO Entry (P5305)	
17. Change Request Print (P53401)	

16.8 Account Change Request Inquiry (P53220)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. Revenue Amount Type	
2. Revenue Status	
3. Buyout Amount Type	
4. Buyout Status	
5. Cost Type	
6. Cost Status	
DREAMWRITER VERSIONS:	
If left blank, ZJDE0001 is used.	
7. Change Request Revisions (P53019)	
8. Change Request Details (P53029)	
9. PCO Entry (P5304)	
10. CO Entry (P5305)	
ACCOUNT CHANGE REQUEST PRINT:	
11. Enter a '1' to call Account Request Print by Status Code (P53421). Leave BLANK to call Account Change Request Print (P53420).	
12. Enter the DREAM Writer version to use for the above report. If left blank, ZJDE0001 is used.	

16.9 Status Code Audit (P53221)

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
Enter the version for each program.	
If left blank, ZJDE0001 will be used.	
1. Change Request Details (P53029)	

16.10 Planned Change Order Inquiry (P53240)

Processing Option	Processing Options Requiring Further Description
DEFAULT PCO STATUS:	

Processing Option	Processing Options Requiring Further Description
1. Enter a value for the PCO Status that will be used in selecting the PCOs that will be displayed.	
DREAM Writer Versions	
Enter the Version IDs that will be used when the following programs are executed. If left blank, ZJDE0001 is used.	
2. PCO Entry (P5304)	
3. CO Entry (P5305)	
4. F21 Print (P53440)	
SEQUENCING:	
5. Enter a value that identifies how the PCOs are sequenced for a Job:	
1 = PCO Number - Ascending	
2 = PCO Number - Descending	
3 = Submitted Date - Ascending	
4 = Submitted Date - Descending	
6. Enter the desired screen order.	
Key in the order by entering a '1' for the first screen, '2' for the second and '3' for the third. If left blank the screen will not appear.	
- Buyout/Subcontractor	
- Revenue/Owner	
- Cost/Budget	

16.11 Change Order Inquiry (P53250)

Processing Option	Processing Options Requiring Further Description
DEFAULT CO STATUS:	
1. Enter a value for the CO Status that will be used in selecting the COs that will be displayed.	
DREAM Writer Versions	
Enter the Version IDs that will be used when the following programs are executed. If left blank, ZJDE0001 is used.	
2. CO Entry (P5305)	
3. F21 Print (P53440)	
SEQUENCING:	
4. Enter a value that identifies how the COs are sequenced for a Job:	
1 = CO Number - Ascending	
2 = CO Number - Descending	
3 = Submitted Date - Ascending	
4 = Submitted Date - Descending	

Processing Option	Processing Options Requiring Further Description
5. Enter the desired screen order.	
Key in a '1' for the first screen, '2' for second and '3' for third.	
If left blank the screen will not appear.	
- Buyout/Subcontractor	
- Revenue/Owner	
- Cost/Buyout	

16.12 Change Request Inquiry - Buyout (P53300)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTION:	
1. Enter a "1" to display summarized information per Change Request.	
Leave blank to display detail lines for each Change Request.	
DEFAULT OPTION:	
2. Enter the default Contract Type.	
Leave blank to default Type "OS".	

16.13 Change Request Inquiry - Revenue (P53310)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTION:	
1. Enter a "1" to display summarized information per Change Request.	
Leave blank to display detail lines for each Change Request.	
DEFAULT OPTION:	
2. Enter the default Contract Type.	
Leave blank to default Type "R2".	

17

Reports Processing Options

This chapter contains these topics:

17.1 Change Request Index (P53400)

Processing Option	Processing Options Requiring Further Description
FORMAT SELECTION:	
1. Select the format to print:	
"1" = Cost and revenue summarized information	
"2" = Revenue and buyout detail	
"3" = Revenue detail	
"4" = Buyout detail	
Blank = Simple format with no amounts	
NOTE: The information printed on the report is for the last requote only.	
To select a specific requote number, you must run the Change Request Detail Report (P53410).	
PRINT OPTION:	
2. Enter a "1" to print the text with each change request. Leave blank to print no text.	

17.2 Log Report with Update (P44300)

Processing Option	Processing Options Requiring Further Description
PRINT OPTIONS:	

Processing Option	Processing Options Requiring Further Description
1. Select the project management view to print:	
' ' or '1' = Contract Management (system 44).	
'2' = Contract Billing (system 52).	
'3' = Change Management (system 53)	
2. Enter '1' to print the associated log text.	
Leave blank (default) to print no text.	
UPDATE STATUS:	
3. Enter a '1' to change unsatisfied, expired logs that have a Pay Effect of 'Y' to a Status of 'N'.	

17.3 CR Summary Print - Ascending / Text (P53401)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES FOR AMOUNTS:	
Enter a default value to determine how Buyout and Revenue Totals are calculated. If left blank, Best Amounts will be used.	
'O' or '1' = Original Amounts	
'Q' or '2' = Quoted Amounts	
'F' or '3' = Final Amounts	
'B' or '4' = Best Amounts	
1. Buyout Total	
2. Revenue Total	
3. Cost Totals	
CHANGE REQUEST HEADER TEXT:	
Enter a default value to determine if the Change Request header text is printed on the report. If left blank, no text will be printed.	
'0' = Print no text	
'1' = Print header text	
4. Header Text	

17.4 Change Request Details by Account (P53402)

Processing Option	Processing Options Requiring Further Description
CHANGE REQUEST HEADER TEXT:	
Enter a default value to determine if the Change Request header text is printed on the report. If left blank, no text will be printed.	
'0' = Print no text	
'1' = Print header text	
1. Header Text	

17.5 Print Summary - Single Change Request (P5301P)

Processing Option	Processing Options Requiring Further Description
PRINT SELECTIONS:	
1. Enter "1" to suppress the printing of Change Request Detail Descriptions.	
2. Enter "1" to suppress the printing of Change Request Log Text.	

A

Functional Servers

Several JD Edwards World programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values
- Field edits and valid values
- Error processing
- Relationships between fields or applications

The advantages of a functional server are:

- It reduces maintenance of entry programs because edit rules reside in one central location.
- You can standardize documents across all applications because you create them using the same business rules.
- The user interface (appearance and interaction) of a screen is now generally separate from how a program works.

To set up business rules for an entry program you must:

1. Create a DREAM Writer version for a specific functional server program. For example, create a DREAM Writer version for XT0411Z1 for voucher entry.

2. Set the processing options within the version according to your company requirements.

3. Specify the version you want the entry program to use in the processing options for that entry program.

You can have all your entry programs use the same DREAM Writer version and thus, use the same rules or you can set up different DREAM Writer versions. JD Edwards World provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.

> **Caution:** Only the person responsible for system-wide setup should make changes to the functional server version. For more information about setting up DREAM Writer versions, see Work with DREAM Writer the *JD Edwards World Technical Foundation Guide*.

Voucher Processing Using the Functional Server

The following programs use the voucher processing functional server. JD Edwards World provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.

- Speed Voucher Entry (P040015)

- Standard Voucher Entry (P04105)

- Void Payment Entry (P4704103)

- Credit Tied to Debit Bill (P041010)

- Multi-Voucher (P041017)

- Calculate Withholding (P04580)

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