

JD Edwards World

Work Orders Guide

Release A9.4

E58795-01

April 2015

Describes the management of small, short-term tasks that might be a part of a major project. Designed for quick setup, simple cost accounting, and basic scheduling of projects that can be completed quickly.

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Preface

Welcome to the JD Edwards World Work Orders Guide.

Audience

This document is intended for implementers and end users of JD Edwards World Work Orders system.

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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:

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Conventions

The following text conventions are used in this document:

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

Overview to Work Orders

This chapter contains these topics:

- [Section 1.1, "System Integration,"](#)
- [Section 1.2, "Features,"](#)
- [Section 1.3, "Work Orders Process Flow,"](#)
- [Section 1.4, "Work Orders Tables."](#)

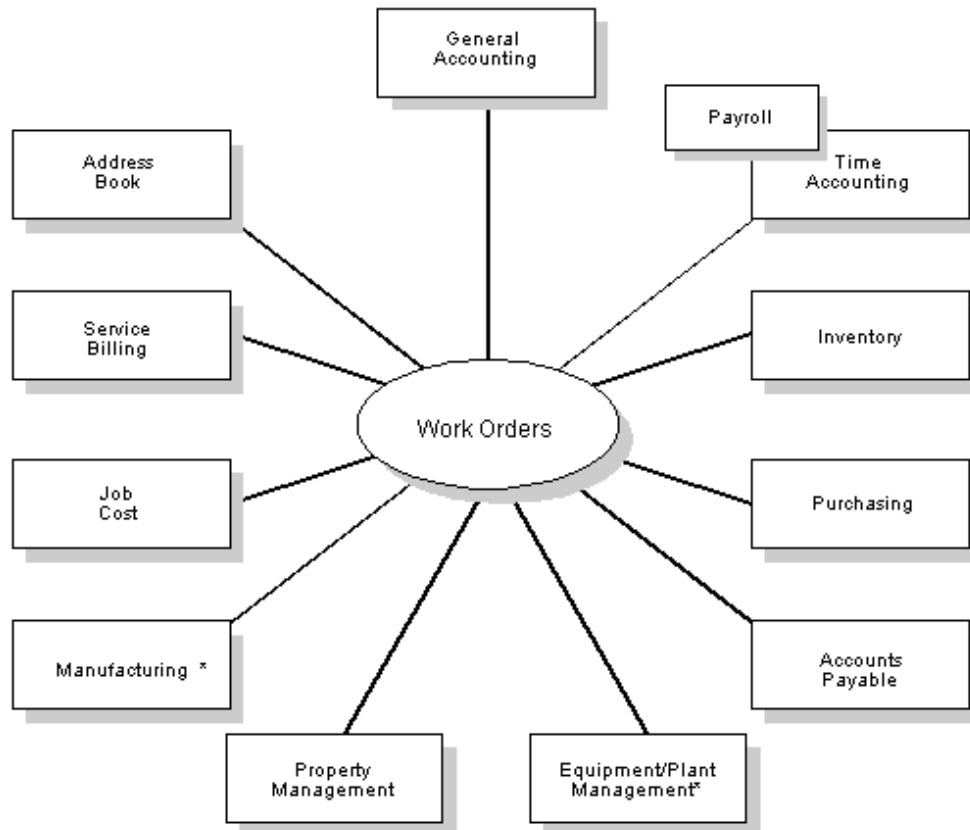
The JD Edwards World Work Orders system is specifically designed to handle small, short-term tasks that might be a part of a major project. It is also designed for quick setup, simple cost accounting, and basic scheduling for projects that can be completed quickly. You can use the Work Orders system to keep these projects as organized and well managed as your long-term projects.

1.1 System Integration

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

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

The following graphic shows how the Work Orders system integrates with other JD Edwards World systems.

Figure 1-1 Work Orders System Integration

* Additional features and functionality are available for the Work Orders system in the Manufacturing and Equipment/Plant Management systems

1.2 Features

The Work Orders system includes the following features:

- Paperless processing
- Quick work order creation
- Work order approval
- Work order activity rules
- Easy location of work orders
- Easy updates of work orders
- Simple budget and estimate controls
- Multiple control dates
- Multiple levels of responsibility
- Unlimited narrative remarks
- Project setup and tracking
- Flexible project management reporting

1.2.1 Paperless Processing

You can save paper as you track your work orders and projects with the Work Orders system. You enter work orders online and perform most of the subsequent processing without relying on printed documents.

1.2.2 Quick Work Order Creation

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

1.2.3 Work Order Approval

You can establish approval controls for a work order based on a variety of criteria, including work order type, status, and the dollar amount involved. For example, you can specify that all maintenance work orders must be approved before any work can begin. You can also specify who must approve the work orders and the threshold monetary amount for which each person is responsible. You can also review the approval status of a work order.

1.2.4 Work Order Activity Rules

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

- Whether the work order is active or inactive at a particular status
- Whether to lock the work order to prevent changes

1.2.5 Easy Location of Work Orders

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

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

1.2.6 Easy Updates of Work Orders

You can use the Scheduling Workbench to update work orders. For example, you can update the following information for a work order:

- The life-cycle status
- The planned start and completion dates

- The estimated hours to complete the work
- The flash message, which indicates whether the work order is urgent, an emergency, or critical

1.2.7 Simple Budget and Estimate Controls

You can use the Work Orders system to track the simple estimate and budget requirements of a work order. For example, you can enter budget information on Enter Work Orders, then update that information using Scheduling Workbench. You can also track the information from both Scheduling Workbench and Cost Accounting. In addition, you can use a variety of reports to compare estimates with actual information.

1.2.8 Multiple Control Dates

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

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

1.2.9 Multiple Levels of Responsibility

You can assign several levels of responsibility to each work order, such as:

- The job or business unit that has been charged
- The originator of the work order
- The manager
- The supervisor

You can also use category codes to assign levels of responsibility to work orders.

1.2.10 Unlimited Narrative Remarks

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

- Expected actions
- Actual operations performed
- Tools required
- Procedures for completing the work

1.2.11 Project Setup and Tracking

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

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

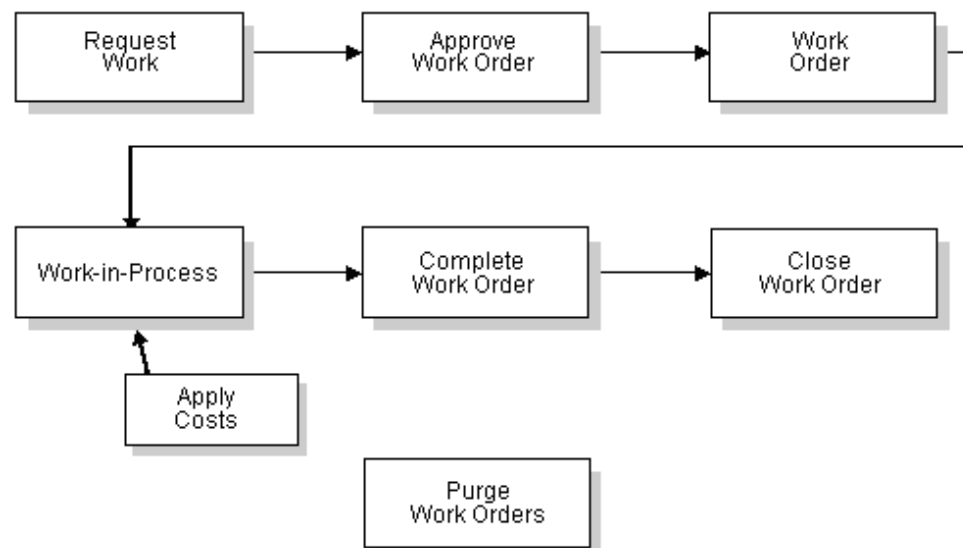
1.2.12 Flexible Project Management Reporting

You can manage projects using the simple project management reports, which print information that relates to your work orders. You can use any of the following reports:

Report	Description
Project Gantt Chart	This graphical report shows the start and end points of the series of work orders that make up a project.
Project Task Details	This report provides detailed information on the work orders (tasks) in a project.
Project Punch List	This report provides a practical way to check the status of each work order in a project.
Project Status Summary	This report lists all work orders that are assigned to a specific manager and a summary of work order activity for that manager by status, type, and phase.

1.3 Work Orders Process Flow

Figure 1–2 Work Orders Process Flow



1.4 Work Orders Tables

This section includes lists of tables.

1.4.1 Primary Tables and Descriptions

Table	Description
Work Order Master (F4801)	Contains one record for each work order. This table also stores static information about a work order, such as the description, estimated hours and amounts, responsibility, and charging information. It also stores planned start and end dates.
Work Order Instruction (F4802)	Contains one record per line of instruction. It stores description text and the various record types that are defined in the user defined codes, such as Description of Request and Final Disposition.
Account Ledger (F0911)	Stores amount and unit information that is related to each work order. The work order information is stored as a subledger with a subledger type of W.

1.4.2 Secondary Tables and Descriptions

Table	Description
Work Order Default Coding (F48001)	Stores default manager and supervisor codes for work orders, by category codes 01 through 03.
Work Order Record Type (F48002)	Contains the valid work order record types. It stores header information for the Work Order Instruction table.
Account Balances (F0902)	Stores balances by account and by work order. It stores information by ledger type and fiscal year.
Standard Procedures/General Message (F0091)	Stores general instructions that relate to a work order.
Work Order Activity Rules (F4826)	Stores activity rules that relate to a work order.
Work Order Approval Routing (F4827)	Stores approval route information.
Approval Audit/Review (F4828)	Contains approval status information that relates to a work order.

1.4.3 Support Tables and Descriptions

Table	Description
Business Unit Security (F0001)	Contains authorization for users of business unit information.
Next Numbers (F0002)	Assigns a unique number to each work order that you create.
User-Defined Codes (F0005)	Stores valid user defined system codes and descriptions.
Business Unit Master (F0006)	Stores job and business unit information.
Address Book Master (F0101)	Contains name and address information for the customer, manager, originator, and supervisor.
Account Master (F0901)	Contains the chart of accounts information.

Part I

Work Order Creation

This part contains these chapters:

- [Chapter 2, "Overview to Work Order Creation,"](#)
- [Chapter 3, "Create Work Orders,"](#)
- [Chapter 4, "Copy Work Order Information,"](#)
- [Chapter 5, "Create Work Orders for a Project."](#)

Overview to Work Order Creation

This chapter contains these topics:

- [Section 2.1, "Objectives,"](#)
- [Section 2.2, "About Work Order Creation."](#)

2.1 Objectives

- To create a work order master record
- To identify the required information for a master record
- To enter record type information for a work order

2.2 About Work Order Creation

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

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

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

Work order creation consists of the following tasks:

- Creating work orders
- Copying work order information
- Creating work orders for a project

Create Work Orders

This chapter contains these topics:

- [Section 3.1, "Creating Work Orders,"](#)
- [Section 3.2, "Entering Basic Work Order Information,"](#)
- [Section 3.3, "Assigning Additional Information to Work Orders,"](#)
- [Section 3.4, "Entering Descriptive Information for Work Orders,"](#)
- [Section 3.5, "Adding Supplemental Data for Work Orders."](#)

3.1 Creating Work Orders

You create work orders by entering all of the necessary information for those tasks that are unique. When you enter a work order, the system creates a master record. A master record must exist for every work order that you want to track in the Work Orders system. The master record includes the basic information that defines the work order, such as:

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

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

By creating a work order, you also communicate important information about a task to others who are involved. You can assign record types to a work order and then enter descriptive information into each record type to note the specific details about the task. For example, you might want to include special instructions and the parts and tools that are needed to complete the task.

3.1.1 Before You Begin

- Before you create work orders, you must define your chart of accounts for the charge-to business unit information. See *Create Chart of Accounts in the JD Edwards World General Accounting I Guide*.

3.1.2 What You Should Know About

Topic	Description
Using parent work orders	<p>When you create a work order using a parent work order, the system uses information from the parent work order as default values for the work order. If you leave any of these information fields blank when you create the work order, the system inputs the values from the parent work order. The only information for which the system does not provide default values includes:</p> <ul style="list-style-type: none"> ■ Description ■ Extended description ■ Tax code ■ Tax rate and area ■ Date completed
Deleting a work order	<p>You cannot delete a work order if it has any account ledger transactions associated with it, or if it is used as a parent work order. You can, however, inactivate a work order by entering a code in the Subledger Inactive field on Enter Work Orders.</p>
Processing options	<p>You can use processing options to automatically enter information for the type, priority, status, and category codes 1, 2, and 3. You can also use processing options to automatically assign the manager and supervisor, if you defined them when setting up the system.</p> <p>See Section 18.1, "Setting Up Default Managers and Supervisors."</p>

See Also:

- [Section 4.1, "Copying Work Order Information."](#)

3.2 Entering Basic Work Order Information

Navigation

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

From Work Order Processing (G4811), choose Enter Work Orders

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

To enter basic work order information

On Enter Work Orders

Figure 3–1 Enter Work Orders screen

1. Complete the following fields:
 - Description
 - Charge to Business Unit
2. Complete the following optional fields:
 - Cost Code
 - Type
 - Status
3. To enter additional text about the work order, complete the following field:
 - Description
4. Review the following fields, as necessary:
 - Parent Work Order Number
 - Status Comment
 - Search X-Ref
 - Estimated Hours
 - Estimated Amount
 - Phase
 - Type
 - Priority
 - Tax Explanation Code
 - Tax Rate/Area
 - Subledger Inactive
 - Customer Number
 - Manager
 - Start Date

- Planned Complete
- Completed
- Status
- Transaction
- Date Assigned

Field	Explanation
Charge to BU	<p>A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant.</p> <p>Business unit security can prevent you from locating business units for which you have no authority.</p>
Cost Code	<p>A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.</p>
Parent W.O. No	<p>This is the parent work order number. You can use this number to:</p> <ol style="list-style-type: none"> 1. Enter default values for newly added work orders, for example, Type, Priority, Status, or Manager. 2. Group work orders for project setup and DREAM Writer selection. <p>Form-specific information</p> <p>For Work Orders</p> <p>When you create a new work order using a parent work order, the system uses information from the parent work order as default values for the new work order. If you leave any of these information fields blank when you create the new work order, the system uses the values from the parent work order. The only information that the system does not use as default values from the parent work order includes:</p> <ul style="list-style-type: none"> ■ Description ■ Extended description ■ Tax code ■ Tax rate and area ■ Date completed
Status Comment	<p>A brief description to explain the status of the work order.</p>
Search X-Ref	<p>An alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.</p>
Est. Hours	<p>The estimated hours that are budgeted for this work order.</p>
Est. Amount	<p>The estimated dollar amount that is budgeted for this work order.</p>

Field	Explanation
Phase	<p>A user-defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.</p> <p>Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.</p>
Type	<p>A user defined code (system 00, type TY) that indicates the type classification of a work order or engineering change order. You can use work order type as a selection criteria for work order approvals.</p>
Priority	<p>A user defined code (system 00, type PR) that indicates the relative priority of a work order or engineering change order in relation to other orders.</p> <p>A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work order you create on those forms and on the Project Setup form. You can either accept or override the default value.</p>
Start Date	<p>This is a start date for the work order or engineering change order. You can enter the date manually or let the system enter it for you. If the work order is associated with a parent work order, the system enters the start date from the parent work order. If there is no associated parent work order, the system enters the system date.</p>
Planned Comp	<p>The date the work order is planned to be completed.</p>
Completed	<p>The date the work order or engineering change order is completed or canceled.</p>
Transaction	<p>The date that a specific order was entered into the system. You can enter a date in this field. The default value for this date is the system date.</p>
Tax Expl Code	<p>A user defined code (00/EX) that controls how a tax is assessed and distributed to the G/L revenue and expense accounts.</p>
Tax Rate/ Area	<p>A code that identifies a tax or geographic area that has common tax rates and tax distribution. You must define the tax/rate area to include the tax authorities (for example, state, county, city, rapid transit district, province, and so on) and their rates. In order for the codes to be valid, you must set them up in the Tax Rate/Area file.</p>
Subledger Inact	<p>A code that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive. Examples are jobs that are closed, employees that have been terminated, or assets that have been disposed of. If a subledger becomes active again, set this field back to blank.</p> <p>If you want to use subledger information in the tables for reports but want to prevent transactions from posting to the master record, enter a value other than blank in this field.</p>
Date Assigned	<p>The date the person responsible for the work order receives the work order.</p>

Field	Explanation
Customer No	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.
Manager	The address book number of a manager or planner. Note: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. (You can either accept or override the default value.)

3.2.1 What You Should Know About

Topic	Description
Extended descriptions for work orders	The system stores the extended description that you enter for a work order in record type A. You can review the extended description on Project Detail Entry.

3.2.2 Processing Options

- See [Section 26.1, "Project Detail Entry \(P48014\)."](#)

3.3 Assigning Additional Information to Work Orders

Navigation

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

From Work Order Processing (G4811), choose Enter Work Orders

After you enter the basic work order information, you can further identify the work order by assigning the following additional information:

- Category codes
- Originator and supervisor information
- Standard procedures

Category codes and standard procedures are user defined. You set up category codes to identify the work order as part of group of work orders that have similar characteristics. You set up standard procedures to associate a work order or group of work orders with general message text, such as instructions for a work order.

As an alternative to entering category codes manually, you can use the Work Order Category Revisions - Z File program (P48016Z) to import an extensive amount of category code data into your system. See [Appendix B, "Import Mass Data into Manufacturing Systems"](#) for more information.

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

To assign additional information to work orders
On Enter Work Orders

1. Complete the steps for locating a work order.
2. Choose Category Code Revisions.

Figure 3–2 Work Order/Rate Category Codes screen

The screenshot shows the 'Work Order/Rate Category Codes' screen in Oracle JD Edwards World. The window title is '48016 Work Order/Rate Category Cod'. The screen displays a form with various fields for entering work order information. Fields include Action Code (1919), V.O./Rate Number, Flash Message, Phase, Category 02 through 20, Status, Service Type, Skill Type, Experience Level, Originator, Supervisor, Std. Desc, and Search X-Ref. A message 'Convert Off. to Conference Rn.' is displayed. The bottom of the screen shows function keys: F2=Standard Desc Text, F5=Update w/Redisplay, and F24=More Keys.

3. On Work Order - Category Codes, complete any of the following fields to enter additional information to the work order:
 - Phase
 - Category Codes 02-10
 - Originator
 - Supervisor
 - Standard Description
 - Search Cross Reference

Field	Explanation
Phase	<p>A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.</p> <p>Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.</p>
Category 02	<p>User defined code system 00, type W2, which indicates the type or category of a work order.</p> <p>Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)</p>

Field	Explanation
Originator	The address book number of the person who originated the change request.
Supervisor	The address book number of the supervisor. Note: A processing option for some forms allows you to enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers & Supervisor form. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. You can either accept or override the default value.
Std. Desc	A user defined code (system 48, type SN) that is assigned to a standard note, message, or general narrative explanation. You can use this code to add instructional information to a work order. You set up codes for this field on Standard Description. Form-specific information For Equipment/Plant Maintenance users: You can use this code to assign narrative text for a standard procedure. The information appears on the Item PM schedule and the work order routing.
Search X-Ref	An alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.

See Also :

- [Section 16.1, "Setting Up User-Defined Codes,"](#)
- [Section 17.1, "Setting Up Standard Procedures,"](#)
- [Section 18.1, "Setting Up Default Managers and Supervisors."](#)

3.4 Entering Descriptive Information for Work Orders

Navigation

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

From Work Order Processing (G4811), choose Enter Work Orders

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

You can also copy the descriptive information from an existing work order into the work order that you are creating.

To enter descriptive information for work orders

On Enter Work Orders

1. Complete the steps for locating a work order.
2. Choose Exit to Detail Specifications.

Figure 3–3 W.O. Detail Entry screen

4802 W.O. Detail Entry

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Redisplay/Re-resh Vid
Exit to Record Types In
Clear Screen

4802 W.O. Detail Entry
Full Description of Request

Action Code
Order Number 1919 Convert Off. to Conference Rm.

Description
Convert office to conference room.

Option

Opt: 1=Insert 9=Delete F5=Refresh F8=Record Types F24=More Keys

3. On Work Order Detail Entry, enter the appropriate information for the current record type.
4. To change the record type, complete the following field:
 - Record Type

Figure 3–4 W.O. Detail Entry (Record Type) screen

4802 W.O. Detail Entry

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Redisplay/Re-resh Vid
Exit to Record Types In
Clear Screen

4802 W.O. Detail Entry
Plan and Drawing Reference

Action Code
Order Number 1919 Convert Off. to Conference Rm.

Description
Convert office to conference room.

Drawing Number
Drawing Revision No.
Drawing Date

Opt: 1=Insert 9=Delete F5=Refresh F8=Record Types F24=More Keys

5. Enter the appropriate information for the current record type.
6. To enter information for any remaining record types specific to your needs, repeat steps 4 and 5.

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

3.4.1 What You Should Know About

Topic	Description
Extended descriptions for work orders	The system stores the extended description for a work order in record type A. You enter information for record type A when you complete the extended description on Work Order Entry.

See Also :

- [Section 4.1, "Copying Work Order Information,"](#)
- [Section 20.1, "Setting Up Formats for Record Types."](#)

3.5 Adding Supplemental Data for Work Orders

You can add supplemental data to further define the work orders in your system. You use supplemental data to report and track work order details that are important to your company, but are not included in the record types.

In addition, you can format the supplemental data for your work orders using two display modes.

Mode	Description
Display mode C	The system automatically accesses the Data Entry program where you can enter code-specific information. The system edits the values you enter against values in the User Defined Codes table (F0005).
Display mode O	The system automatically accesses the Related Order Entry program and bypasses code-specific information. If you use display mode O, the system does not edit the narrative text that you enter against user defined codes.

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

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

Adding supplemental data to work orders includes the following tasks:

- Entering supplemental data for a work order
- Reviewing supplemental data by type
- Reviewing supplemental data by work order

3.5.1 Before You Begin

- Set up the supplemental data types that you want to maintain for the work orders in your system. See [Section 21.1, "Setting Up Work Order Supplemental Data"](#) for more information.

To enter supplemental data for a work order

Navigation

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

From Work Order Processing (G4811), choose Supplemental Data

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

On Data Entry

Figure 3–5 Data Entry screen

1. To display a list of valid supplemental data types that are specific to a work order, complete the following field:
 - Order Number
2. Choose one or more data types for the specific work order database.
The system displays the name of the database on the entry form.
3. On the data type entry form, complete the appropriate fields.
4. To enter an additional remark for the data type, choose Detail.
5. To display the entry form for the next data type that you selected on the Data Entry form, choose Exit Program.

If you selected only one data type, the system returns to Data Entry.

To review supplemental data by type

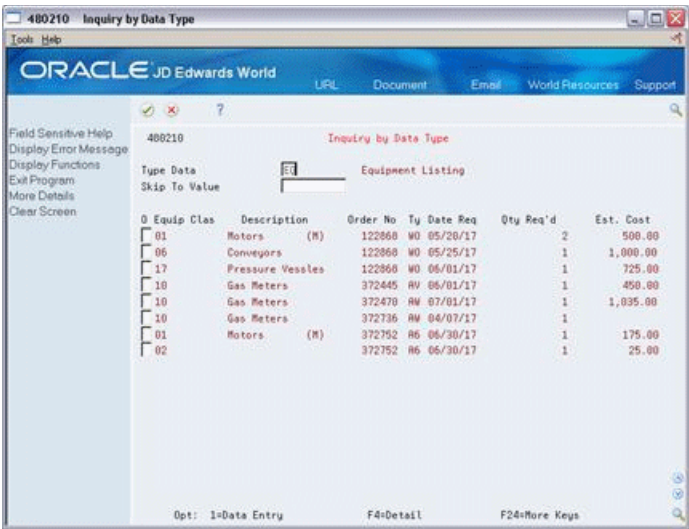
Navigation

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

From Work Order Processing (G4811), choose Supplemental Data

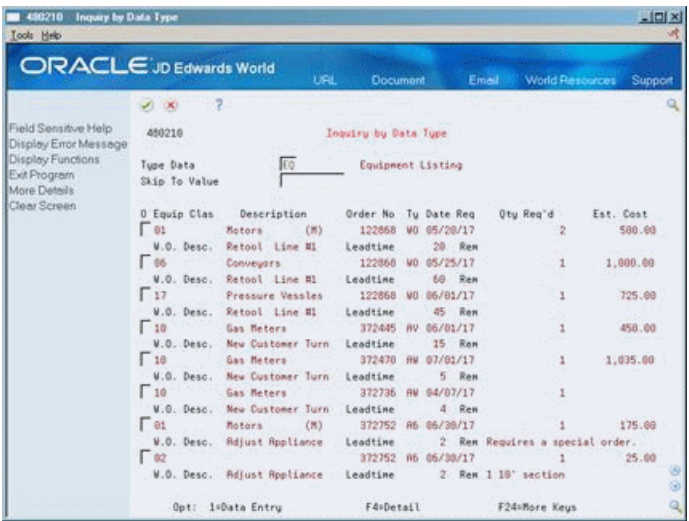
From Work Order Supplemental Data (G4813), choose Inquiry by Data Type
On Inquiry by Data Type

Figure 3–6 Inquiry by Data Type screen



1. Complete the following field:
 - Type Data
2. To view additional information, access the detail area (F4).

Figure 3–7 Inquiry by Data Type (Detail) screen



To review supplemental data by work order

Navigation

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

From Work Order Processing (G4811), choose Supplemental Data

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

On Inquiry by Order

Figure 3–8 Inquiry by Order screen

Order Number	Type	Priority	Status	Phase	Category 02	Category 03	Work Order Date	Start Date	Requested	Planned Comp	Completed
480280	3 Capital Project	3 Normal - RGRP	M3 W/O Completed	1 Project Phase 1			03/30/14	05/20/17	05/20/17	06/10/17	06/10/17

Equip Clas	Qty Req'd	Est. Cost	Date Req	Leadtime
01 Rotors (R)	2	500.00	05/20/17	20
06 Conveyors	1	1,600.00	05/25/17	60
17 Pressure Vessels	1	725.00	06/01/17	45

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

Complete the following field:

- Order Number

3.5.2 Processing Options

- See [Section 26.2, "Work Order Profile Inquiry \(P480200\)."](#)

Copy Work Order Information

This chapter contains the topic:

- [Section 4.1, "Copying Work Order Information."](#)

4.1 Copying Work Order Information

Navigation

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

From Work Order Processing (G4811), choose Enter Work Orders

You can create work orders by copying the information from existing work orders for those tasks that are similar to other tasks that you perform. You can assign an existing work order as the parent to the work order that you are creating. The Work Orders system then uses the information that is stored in the master record for the parent work order. The system automatically enters the basic work order information, category codes, and record type information into the new work order.

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

Complete the following tasks:

- Create work orders using parent information
- Copy descriptive text from an existing work order

To create work orders using parent information

On Enter Work Orders

Figure 4–1 Enter Work Orders screen

1. Complete the following fields:
 - Parent Work Order Number
 - Description
2. Complete all of the fields that must contain unique information rather than the default information that the system provides from the parent work order.
3. Revise, as necessary, any of the fields that contain information from the parent work order.
4. Assign any additional information (category codes, and so on) that you want to apply to the work order.

See [Section 3.3, "Assigning Additional Information to Work Orders."](#)

5. Enter any record type information that you want to apply to the work order.

See [Section 3.4, "Entering Descriptive Information for Work Orders."](#)

See Also:

- [Section 3.1, "Creating Work Orders."](#)

Field	Explanation
Parent W.O. No	<p>This is the parent work order number. You can use this number to:</p> <ol style="list-style-type: none"> 1. Enter default values for newly added work orders, for example, Type, Priority, Status, or Manager. 2. Group work orders for project setup and DREAM Writer selection. <p><i>Form-specific information</i></p> <p>For Work Orders</p> <p>When you create a new work order using a parent work order, the system uses information from the parent work order as default values for the new work order. If you leave any of these information fields blank when you create the new work order, the system uses the values from the parent work order. The only information that the system does not use as default values from the parent work order includes:</p> <ul style="list-style-type: none"> ■ Description ■ Extended description ■ Tax code ■ Tax rate and area ■ Date completed

To copy descriptive text from an existing work order

On Enter Work Orders

Figure 4–2 Enter Work Orders (Copy) screen

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

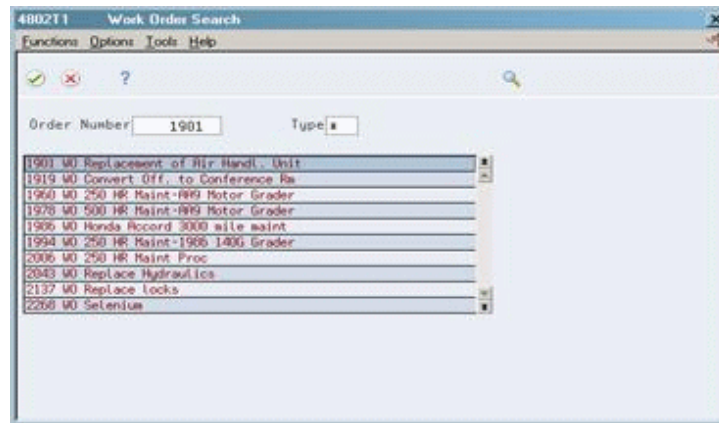
- Work Order Number

If you don't know the work order number, you can locate a work order using the Scheduling Workbench.

See [Section 7.1, "Locating Work Orders."](#)

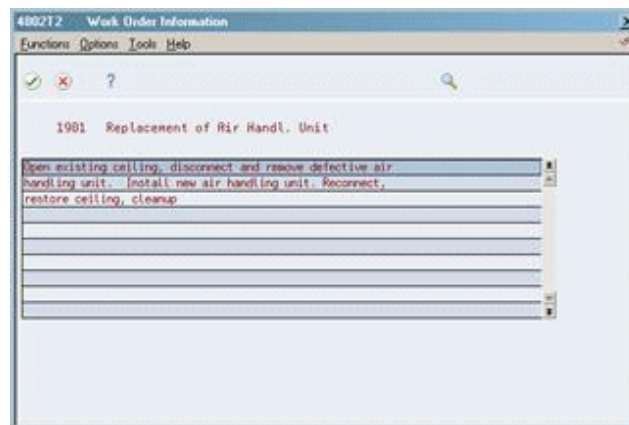
2. Choose Work Order Search.

Figure 4–3 Work Order Search screen



3. On Work Order Search, complete one or both of the following fields to limit your search for the work order from which you want to copy text:
 - Order Number
 - Type
4. Choose the work order from which you want to copy text.

Figure 4–4 Work Order Information screen



5. On Work Order Information, choose the lines of text that you want to copy.
The system copies the description information from the existing work order into the new work order.

Figure 4-5 Enter Work Orders (Copied) screen

48014 - Enter Work Orders

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Exit to Detail Specification
Category Code Revision
Exit to Name Search
Work Order Search Win
Print Work Order
Clear Screen

48014 Enter Work Orders

Action Code: 1
Description: Replacement of Air Handl. Unit
Status Comment: Emergency Order
Search W-Ref:
Est. Hours: 15.00
Est. Amount: 350.00
Phase:
Type: 1
Priority: 1
Tax Expt Code:
Tax Rate/Area:
Subledger Inact.: Active Subledger
Customer No:
Manager:
Parent W.O. No:
W.O. Number: 1901
Charge to BU: 501
Cost Code: 02200
Start Date:
Planned Comp:
Completed:
Status: PM
Transaction: 08/08/11
Date Assigned:
Description: Open existing ceiling, disconnect and remove defective air handling unit. Install new air handling unit. Reconnect. Restore ceiling, cleanup.
Option:
Opt: 1=Insert 9=Del F5=More Desc F8=Cat Codes F21=Print F24=More Keys

Create Work Orders for a Project

This chapter contains the topic:

- [Section 5.1, "Creating Work Orders for a Project."](#)

5.1 Creating Work Orders for a Project

Navigation

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

From Simple Project Management (G4812), choose Project Setup

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

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

To create work orders for a project

On Project Setup

Figure 5–1 Project Setup screen

1. To enter the work order information for a project, complete the following fields:
 - Parent Work Order Number
 - Task
2. Complete the following optional fields:
 - Customer
 - Job or Business Unit
 - Phase
 - Start
 - Complete
 - Hours
3. Access the detail area (F4).

Figure 5–2 Project Setup (Details) screen

4. To enter additional information for the work orders, complete the following optional fields:
 - Standard Description
 - Manager

After you enter the work orders, the system creates the project.
5. To review the work orders that you entered for the project, complete the following field:
 - Parent Work Order Number
6. Complete the following optional fields:
 - Customer
 - Job or Business Unit
 - Skip to Phase
 - Status
7. Choose Work Order Detail for each work order in the project.

Figure 5–3 W.O. Detail Entry screen

The screenshot shows the 'W.O. Detail Entry' screen in Oracle JD Edwards World. The window title is '48014 W.O. Detail Entry'. The menu bar includes 'Tools' and 'Help'. The main area is divided into several sections:

- Field Sensitive Help:** A list of help topics on the left side.
- Action Code:** A dropdown menu with 'C' selected.
- Description:** A text field containing 'Convert office'.
- Status Comment:** A text field.
- Search X-Ref:** A text field.
- Est. Hours:** A text field.
- Est. Amount:** A text field with '27.77' entered.
- Phase:** A text field.
- Type:** A text field.
- Tax Expt Code:** A text field.
- Subledger Inact.:** A text field.
- Customer No:** A text field with '1001' entered.
- Manager:** A text field with '5001' entered.
- Parent W.O. No:** A text field with '1919' entered.
- W.O. Number:** A text field.
- Charge to BU:** A text field with '501' entered.
- Cost Code:** A text field with '8220' entered.
- Start Date:** A date field with '06/30/17' entered.
- Planned Comp:** A text field.
- Completed:** A text field.
- Status:** A text field.
- Transaction:** A text field with '06/15/17' entered.
- Date Assigned:** A text field.
- Description:** A list of descriptions, with 'Convert office to conference room' selected.
- Option:** A list of options.

At the bottom, there is a status bar with the text: 'Opt: 1=Insert 9=Del F5=More Desc F8=Cat Codes F21=Print F24=More Keys'.

8. On Work Order Detail Entry, complete all of the fields that must contain unique information rather than the default information that the system provides from the parent work order.
9. Revise any of the fields that contain information from the parent work order, as necessary.
10. Assign any additional information, such as category codes, to the work order.
See [Section 3.3, "Assigning Additional Information to Work Orders."](#)
11. Enter any record type information for the work order.
See [Section 3.4, "Entering Descriptive Information for Work Orders."](#)

Field	Explanation
W.O. Number	A unique number that identifies a work order in your system. If you leave this field blank during work order entry, the system uses the Next Numbers facility (system 48, index 01) to assign the work order number. The work order is stored in the Work Order Master table (F4801).

5.1.1 What You Should Know About

Topic	Description
Using the customer number	<p>When you create work orders for a project, JD Edwards World recommends that you use the customer number in combination with either the job or business unit or the parent work order number.</p> <p>If you use only the customer number, you must enter all the necessary work order information for the individual work orders in the project on Work Order Detail Entry.</p>
Using the job or business unit	If you create work orders for a project using the job or business unit, the system inputs all the default information that is related to cost for the project. You must enter any additional work order information that you want to associate with the individual work orders for the project on Work Order Detail Entry.
Updating additional information	If you only need to update additional information for a work order, you can access Work Order - Category Codes directly from Project Setup.

See Also :

- [Section 4.1, "Copying Work Order Information."](#)

5.1.2 Processing Options

- See [Section 26.3, "Default Values for Speed Project Setup \(P48015\)."](#)

Part II

Work Order Processing

This part contains these chapters:

- [Chapter 6, "Overview to Work Order Processing,"](#)
- [Chapter 7, "Locate Work Orders,"](#)
- [Chapter 8, "Review Work Orders for Approval,"](#)
- [Chapter 9, "Revise Work Orders,"](#)
- [Chapter 10, "Print Work Orders,"](#)
- [Chapter 11, "Add and Review Charges to Work Orders."](#)

Overview to Work Order Processing

This chapter contains these topics:

- [Section 6.1, "Objectives,"](#)
- [Section 6.2, "About Work Order Processing."](#)

6.1 Objectives

- To locate a specific work order or group of work orders
- To understand the work order approval process
- To understand the work order life cycle
- To charge costs and hours to a work order

6.2 About Work Order Processing

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

- Approve a work order to allow work to begin
- Update the life-cycle information for the work order to indicate the progress of the work (for example, that parts have been ordered)
- Track the costs that are associated with the work order, such as parts and labor

Work order processing consists of the following tasks:

- Locating work orders
- Reviewing work orders for approval
- Revising work orders
- Printing work orders
- Adding and reviewing charges to work orders

Locate Work Orders

This chapter contains the topic:

- [Section 7.1, "Locating Work Orders."](#)

7.1 Locating Work Orders

Navigation

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

From Work Order Processing (G4811), choose Scheduling Workbench

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

- A job or business unit
- The person who originated the work orders
- The person who manages or supervises the work to be performed

User defined information that is associated with the work orders, such as category codes, work order types, and so on

Dates associated with the work orders, such as start date and planned completion date

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

After you locate a work order, you can use the Scheduling Workbench to access a variety of forms and complete multiple tasks with a specific work order. For example, after you locate a work order, you can access Work Order Approval directly from the Scheduling Workbench without having to access additional menus.

To locate work orders

On Scheduling Workbench

Figure 7–1 Scheduling Workbench screen

To limit your search for specific work orders, complete any combination of the fields in the top portion of the form.

7.1.1 What You Should Know About

Topic	Description
Cross-system functionality	<p>You must use the Equipment and Plant Management system (13) in addition to the Work Orders system to access the following programs from the Scheduling Workbench:</p> <ul style="list-style-type: none">■ Unscheduled Maintenance■ Equipment Workbench■ Summary Capacity Messages■ PM Schedule■ Completed PM■ Work Order Parts List Revisions■ Equipment Work Orders <p>You must use the Purchase Management system to access Open Order Inquiry.</p> <p>You must use the Shop Floor Control system to access Work Order Inventory.</p>

7.1.2 Processing Options

- See [Section 27.1, "Scheduling Workbench - Work Order Entry \(P48201\)."](#)

Review Work Orders for Approval

This chapter contains these topics:

- [Section 8.1, "Reviewing Work Orders for Approval,"](#)
- [Section 8.2, "Approving Work Orders,"](#)
- [Section 8.3, "Reviewing the Approval History of Work Orders."](#)

8.1 Reviewing Work Orders for Approval

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

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

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

This section contains the following:

- Approving Work Orders
- Reviewing the Approval History of Work Orders

8.2 Approving Work Orders

Navigation

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

From Work Order Processing (G4811), choose Work Order Approval

After you enter the information to create a work order, the system sends an electronic message to notify the person who is responsible for reviewing and approving the work order. Use Work Order Approval to review and approve work orders. You can use a function key from E-mail to take you directly to Work Order Approval.

8.2.1 Before You Begin

- Set up user profiles for all personnel who are responsible for approving work orders. See [Section 19.4, "Setting Up User Profiles."](#)
- Verify that all personnel who are responsible for approving work orders are included in the work order approval routing. See [Section 19.1, "Setting Up Work Order Approvals."](#)

To approve work orders

On Work Order Approval

Figure 8–1 Work Order Approval screen

P Number	Description	Or Ty	W0 Date	Date Reviewed	Estimated Amount	S W0 Nx	T St St
120862	Broken windows	W0	03/04/14		275.00	H	XX
120871	Paint fan and housin	W0	03/04/14		317.00	H	XX
120889	Balance fan blades	W0	03/04/14		575.00	H	XX
140409	Replace and Paint Ha	W0	05/05/15		1,730.00	H	XX

1. Complete the following fields:
 - Type
 - Approval Type

These fields might contain default values.
2. Choose Work Order Master for a work order.
The system displays Work Order Entry.
3. On Work Order Entry, review the work order.
4. Return to Work Order Approval.
5. On Work Order Approval, choose Notes (F4).

Figure 8–2 Work Order Approval (Notes) screen

6. To enter a brief note or explanation, complete the following field:
 - Note
7. To indicate the next status for the work order, complete the following field:
 - Next Status
8. Choose Approve, Reject, or Hold.
9. To complete the process, enter your password.

The system validates the password against your user profile before accepting the approval code.

Field	Explanation
Type	A user defined code (system 00, type TY) that indicates the type classification of a work order or engineering change order. You can use work order type as a selection criteria for work order approvals.
Approval Type	A user defined code (system 48, type AP) indicating the type of work order approval path that a work order follows. You can use processing options to specify a default approval type based on the type of work order.
Next Status	The reject status is the status that the work order will default to if an approver rejects a work order.

8.2.2 Processing Options

See [Section 27.2, "Work Order Approval \(P4828\)."](#)

8.3 Reviewing the Approval History of Work Orders

Navigation

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

From Work Order Processing (G4811), choose Approval Audit/Review

Use Approval Audit/Review to help you monitor the status and progress of work orders. You can review the current approval status of any work order in your system. When you enter the number of a work order, the system displays:

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

You can also review any notes about the work order.

To review the approval history of work orders

On Approval Audit/Review

Figure 8–3 Approval/Audit Review screen

48295 Approval Audit/Review

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help 48295 Approval Audit/Review

Display Error Message

Display Functions

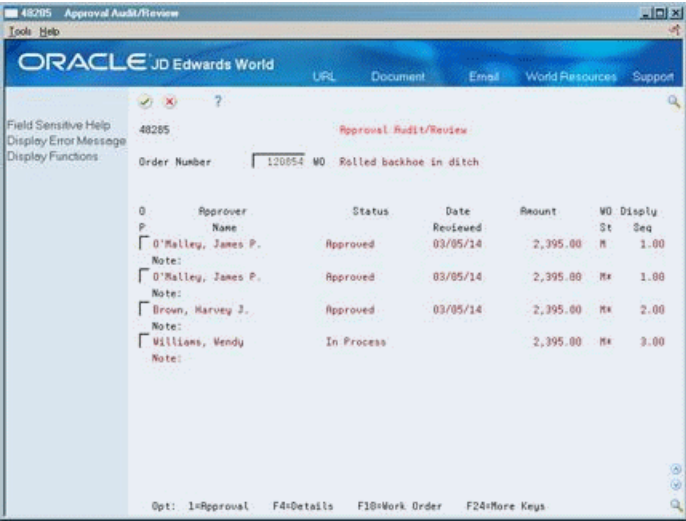
Order Number 120854 WO Rolled backhoe in ditch

0	Approver Name	Status	Date Reviewed	Amount	WO Display
P	O'Malley, James P.	Approved	03/05/14	2,395.00	M 1.00
P	O'Malley, James P.	Approved	03/05/14	2,395.00	M* 1.00
P	Brown, Harvey J.	Approved	03/05/14	2,395.00	M* 2.00
P	Williams, Wendy	In Process		2,395.00	M* 3.00

Opt: 1=Approval F4=Details F10=Work Order F24=More Keys

1. Complete the following field:
 - Work Order Number
2. To review any notes that the approver might have entered for the work order, access the detail area (F4).

Figure 8–4 Approval/Audit Review (Detail) screen



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

8.3.1 What You Should Know About

Topic	Description
Locating a work order	<p>If you don't know the number of the work order that you want to review, you can search for it by using the Scheduling Workbench. Access the field help for the Work Order Number field to display Scheduling Workbench.</p> <p>See Section 7.1, "Locating Work Orders" for more information about using the Scheduling Workbench.</p>

Revise Work Orders

This chapter contains these topics:

- [Section 9.1, "Revising Work Orders,"](#)
- [Section 9.2, "Updating Life Cycle Information for Work Orders,"](#)
- [Section 9.3, "Revising Detail Information for Work Orders."](#)

9.1 Revising Work Orders

You can use the Scheduling Workbench to locate and revise work orders as they move throughout the work order life cycle. For example, you can change the start date of the work order if you do not have the labor resources or parts that you needed to complete the work. You can revise a variety of other information, including:

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

You can use the Scheduling Workbench to revise the same information about multiple work orders. You use search criteria to narrow your search to the specific work orders that you want to revise. This is especially useful when you need to revise a single field, such as Status, for a group of related work orders.

Note: If you already know the work order number, you can quickly update a work order on Enter Work Orders or Single Task Details.

This section contains the following:

- Updating Life Cycle Information for Work Orders
- Revising Detail Information for Work Orders

9.2 Updating Life Cycle Information for Work Orders

Navigation

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

From Work Order Processing (G4811), choose Scheduling Workbench

The life cycle of a work order consists of the steps or statuses through which a work order must pass to indicate the progress of the work it represents. For example, a work order's life cycle can include the following statuses:

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

You can use the Scheduling Workbench to update the life cycle information of a single work order or an entire group of work orders.

To update life cycle information for work orders

On Scheduling Workbench

1. Complete the steps for locating a work order.
2. Update the following field for the work order:
 - Status

Field	Explanation
Status	A user defined code (system 00, type SS) that describes the status of a work order or engineering change order. Any status change from 90 thru 99 automatically updates the date completed.

See Also :

- [Section 7.1, "Locating Work Orders."](#)

9.3 Revising Detail Information for Work Orders

Navigation

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

From Work Order Processing (G4811), choose Scheduling Workbench

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

To revise detail information for work orders

On Scheduling Workbench

Figure 9–1 Scheduling Workbench screen

1. To limit your search for a specific work order or group of work orders, complete any combination of fields.
2. Make any necessary revisions to the work order information.
3. To review additional information for each work order, access the detail area (F4).

Figure 9–2 Scheduling Workbench (Detail) screen

4. Make any necessary revisions to the work order information in the detail area.
The revisions you make using the Scheduling Workbench apply to all work orders that meet the selection criteria that you entered.
5. To revise any work order information that is not included on Scheduling Workbench, choose Work Order Entry.
You must use Work Order Entry to revise work orders that are not included on the Scheduling Workbench.

See Also :

- [Section 19.2, "Setting Up Work Order Activity Rules."](#)

Print Work Orders

This chapter contains these topics:

- [Section 10.1, "Printing Work Orders,"](#)
- [Section 10.2, "Printing Individual Work Orders,"](#)
- [Section 10.3, "Printing a Batch of Work Orders."](#)

10.1 Printing Work Orders

You can print work orders when you need a hard copy of a work order or group of work orders. For example, shop personnel might need to post a hard copy of a work order for equipment that is serviced. If you already know the work order number, you can quickly print the work order from the work order master. If you need to print multiple work orders, you can use DREAM Writer data selection criteria to specify which work orders to print.

This section contains the following:

- Printing Individual Work Orders
- Printing a Batch of Work Orders

10.2 Printing Individual Work Orders

Navigation

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

From Work Order Processing (G4811), choose Scheduling Workbench

You can print individual work orders when you need a hard copy of a work order or group of work orders. For example, shop personnel might need to post a hard copy of a work order for each piece of equipment that is serviced. If you already know the work order number, you can quickly print the work order from the work order master.

To print individual work orders

On Scheduling Workbench

Figure 10–1 Scheduling Workbench screen

48201 Scheduling Workbench

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
 Display Error Message
 Display Functions
 Display Alternate Panel
 Exit Program
 More Details
 Update with Redisplay
 Unscheduled Maintenance
 Toggle Start Date and V
 Work Order Summary V
 Equipment Workbench
 Summary Capacity Mes
 Estimated and Actual A
 Toggle Start Date/Com
 Category Code Analysis
 Clear Screen
 WO Activity Rules

Scheduling Workbench

48201

Action Code
 Job or BU
 Parent V.O. No
 Originator
 Assigned To
 Supervisor
 Search X-Ref
 Category Codes

Cost Code
 Order Type
 Phs.
 Sta.
 CC2
 CC3
 Srv.
 Sk1.
 Exp.
 CC4
 CC5
 CC6

Status
 W.O. Date
 Cpl. Date
 Est Hours
 Duration
 % Compl

From
 Thru

Prior.
 Model.
 Type

OP Number Description X-Ref No. St Status Comment T P

Opt: 1=WO Entry 4=Return w/Number F4=Detail F10=Eg. Workbench F24=More

1. Complete the steps for locating a work order.
2. Choose Print Work Order for each work order you want to print.

Figure 10–2 Work Order Print Report

48415		JD Edwards World	Page Number	1
		Work Order Print	Date	10/30/17
Order Number . .	1919	Convert Off. to Conference Rm.	Business Unit.	501
Customer Number.	1001	Edwards, J.D. & Company	Cost Code. . .	02200
Status Comment .			Start Date . .	06/30/17
Search X-Ref . .			Planned Comp .	
Type			Transaction. .	06/15/17
Priority			Date Assigned.	
Phase			Est. Hours . .	
Status			Est. Amount. .	27.77
Manager	6001	Allen, Ray		
A Full Description of Request				

Convert office to conference room.				11/18/17

10.2.1 What You Should Know About

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

10.3 Printing a Batch of Work Orders

Navigation

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

From Work Order Processing (G4811), choose Print Work Orders

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

To print multiple work orders, use the Print Work Orders program and choose a version from the DREAM Writer versions list. The DREAM Writer versions list includes a DEMO version that you can run as is or copy and modify to suit your needs.

See Also :

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

Add and Review Charges to Work Orders

This chapter contains these topics:

- [Section 11.1, "Adding and Reviewing Charges to Work Orders,"](#)
- [Section 11.2, "Adding Charges to Work Orders,"](#)
- [Section 11.3, "Reviewing Charges by Job or Business Unit,"](#)
- [Section 11.4, "Reviewing Charges by Work Order."](#)

11.1 Adding and Reviewing Charges to Work Orders

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

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

When you enter work order numbers in subledger fields, you can:

- Review summaries of work order charges by job or business unit
- Maintain and track costs online from the Work Orders system
- Review detail cost transactions to individual work orders
- Review posted and unposted transactions that are associated with a work order

This section contains the following:

- Adding Charges to Work Orders
- Reviewing Charges by Job or Business Unit
- Reviewing Charges by Work Order

11.2 Adding Charges to Work Orders

Navigation

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

From Work Order Processing (G4811), choose Accounts Payable Entry

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

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

11.2.1 About Speed Code Entry

You can save time and reduce the possibility of data entry error by using speed code entry when you add charges to work orders. Use the speed code to access account information that is already in the system so that you do not have to re-enter the information. When you use speed code entry, the system:

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

The code that you must enter in the Account Number field for speed code entry depends on the system that you use to add charges to work orders.

System	Instruction
Accounts Payable system	Enter a backslash, work order number, a period and an object account number (\WO. object account) Example: \1919.SHOP
Inventory Management system	Enter a backslash, work order number, a period and an object account number (\WO. object account) Example: \1919.SHOP You must have installed the following systems to use the Inventory Management system: <ul style="list-style-type: none">■ Inventory Base and Order Processing (system 40)■ Inventory Management (system 41)
Time Accounting system	Enter a backslash, work order number, and a period (\WO.) Example: \1919. You must have purchased and installed at least one of the following systems: <ul style="list-style-type: none">■ Time Accounting HRM Base (system 05)■ Payroll (System 07)■ Payroll (Canadian system 77) In addition, you must set up Accounting Rules for Work Orders. See Section 22.1, "Setting Up Accounting Rules for Work Orders."

The following procedure is for entering a typical accounts payable voucher.

To add charges to work orders

On Accounts Payable Entry

Figure 11–1 Accounts Payable Entry screen

1. Enter the information for the accounts payable voucher.

See *Work with Standard Vouchers* in the *JD Edwards World Accounts Payable Guide* for information about entering an accounts payable voucher.

2. To enter work order information, complete the following fields:

- Account Number
- Subledger/Work Order
- Subledger Type

Field	Explanation
Account Number	<p>A field that identifies an account in the general ledger. You can use one of the following formats for account numbers:</p> <ul style="list-style-type: none"> ■ Standard account number (business unit.object.subsidiary or flexible format) ■ Third G/L number (maximum of 25 digits) ■ 8-digit short account ID number ■ Speed code <p>The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program.</p> <p><i>Form-specific information</i></p> <p>For Work Orders speed code entry:</p> <p>To apply charges to a work order using speed code entry, enter a back slash, followed by a work order number, a period, and an object account number (\WO. object).</p> <p>Example: \1919.YARD</p>

Field	Explanation
Subledger	<p>A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so forth. If you enter a subledger, you must also specify the subledger type.</p> <p><i>Form-specific information</i></p> <p>In work orders, this field is the number of a work order for which you enter charges. Leave this field blank if you use speed code entry. This field is edited against the Work Order Master table (F4801).</p>
Subledger Type	<p>A user defined code (00/ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system performs editing. This is either hard-coded or user defined. For example:</p> <p>A – Alphanumeric field, do not edit</p> <p>N – Numeric field, right justify and zero fill</p> <p>C – Alphanumeric field, right justify and blank fill</p>

11.2.2 What You Should Know About

Topic	Description
Closed work orders	You can only add charges to open work orders. The system does not allow you to add charges to closed work orders. You can identify a closed work order by the code in the Subledger Inactive field.
Cross-system functionality	If you use the Time Accounting, Inventory Management or Accounts Payable systems, you can use the work order cost entry selections on Work Order Processing to access the Time Accounting, Inventory Management, and Accounts Payable systems. You do not have to use these selections to apply charges to a work order, but you must have installed these systems to use their functionality with the Work Orders system.
Alternate formats	<p>If you are using the Accounts Payable system and you do not see the entry fields that you need to complete, use function keys to scroll through a series of alternate formats until you find the entry form on which these fields appear.</p> <p>You can use a processing option to always display the subledger format first.</p>
Using Standard Voucher Entry	If you use Standard Voucher Entry, choose Details to enter the subledger and subledger type for the work order costs.
Alternate entry forms	<p>You can also use the Inventory Issues program to enter charges for inventory and materials against a work order.</p> <p>See Issuing Inventory in the <i>JD Edwards World Inventory Management Guide</i>.</p>

11.2.3 Processing Options

See [Section 27.3, "Speed Voucher Entry \(P041015\)."](#)

11.3 Reviewing Charges by Job or Business Unit

Navigation

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

From Work Order Processing (G4811), choose Cost Accounting

You can review work order costs that are associated with a particular job or business unit to help control costs and increase productivity. You can review a summary of all work order costs charged against a job or business unit, or you can limit your search criteria and view only the charges that are within a specific range of dates, a specific ledger type, or both. If you do not use any criteria to limit the work order data, the system displays all work orders within the job or business unit, along with the actual costs and hours that accumulated for each work order.

To review charges by job or business unit

On Cost Accounting

Figure 11-2 Cost Accounting screen

The screenshot shows the 'Cost Accounting' screen in Oracle JD Edwards World. The window title is '48210 Cost Accounting'. The menu bar includes 'Tools' and 'Help'. The main area has a search bar with '48210' and 'Cost Accounting'. Below this, there are fields for 'Job or BU' (501 Potomac Hotel) and 'Skip to Phase'. A table displays work order data:

Phase	W.O.	Task Description	Hours	Amount
	400	Rework Electrical		
	1901	Replacement of Air Handl. Unit		
	1919	Convert Off. to Conference Rm.		
Total for Phase Code				
Total for Business Unit				

At the bottom, there are options: 'Opt: 1=W.O. Cost Detail', 'F4=Budget', and 'F24=More Keys'.

1. Complete the following field:

- Job or Business Unit

Use the same number as Charge-to Business Unit on Enter Work Orders. The Job or Business Unit field on Cost Accounting refers to the value that displays in the Charge To BU field on Enter Work Orders. It does not refer to any other business unit to which you might have applied work order costs on the cost entry forms.

2. Complete the following optional fields:

- Skip to Phase
- From Date/Period
- Thru Date/Period
- Ledger Type

3. Choose Budget (F4).

The system displays work order budget information, if applicable.

Figure 11–3 Cost Accounting (Budget) screen

48210 Cost Accounting

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Clear Screen

48210 Cost Accounting

From Date/Period
Thru Date/Period
Ledger Type

Job or BU
Skip to Phase

501 Potomac Hotel

0 Phas	W.O.	Task Description	Hours	Amount
	400	Rework Electrical Budget	.40	15.00
	1901	Replacement of Air Handl. Unit Budget	15.00	350.00
	1919	Convert Off. to Conference Rm. Budget		27.77
Total for Phase Code				
Budget Total			15.40	392.77

Opt: 1=W.O. Cost Detail F4=Budget F24=More Keys

- Choose Work Order Cost Detail for each work order for which you want to review detailed transaction information.

Field	Explanation
Job Number	<p>A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant.</p> <p>Business unit security can prevent you from locating business units for which you have no authority.</p>
Phase	<p>A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.</p> <p>Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.</p>
From Date/Period	<p>A number that identifies either a fiscal period (numbers from 1 to 14) or a beginning date. The information displayed begins with this date or period. If you leave this field blank, the system displays all transactions up to the Thru Date. Totals are for the transactions displayed.</p>
Thru Date/Period	<p>A number that either identifies the period number or date for which you want to review information. If you leave this field blank, the system uses the end date of the current period for the company that contains the business unit. Valid period numbers are from 1 through 14.</p> <p><i>Form-specific information</i></p> <p>The range of dates for your inquiry. If you leave the Thru field blank, the system displays all dates. Totals are for all the work orders within the range you select.</p>

Field	Explanation
Ledger Type	A user defined code (system 09/type LT) that specifies the type of ledger, such as AA (Actual Amount), BA (Budget Amount), or AU (Actual Units). You can set up multiple, concurrent accounting ledgers within the general ledger to establish an audit trail for all transactions.

11.3.1 What You Should Know About

Topic	Description
Reviewing accumulated totals for a work order	To review accumulated totals for a work order, enter a phase number in the Skip to Phase field. The system displays accumulated totals beginning with the first work order in the phase that you select.

11.4 Reviewing Charges by Work Order

Navigation

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

From Simple Project Management (G4812), choose Cost Detail

To help you monitor and control the costs that are associated with individual work orders, you can review detailed charges against a work order. For example, for any charge against a work order, you can review:

- A description of the transaction
- The account number that was charged
- The units that are charged, such as hours
- The amount of the transaction
- The batch number and the date
- The person responsible for the transaction
- The document number and document type
- The inventory item number or description

When you access the cost detail information for a work order, the system displays a ledger of all general ledger transaction records for the work order.

You can select a range of dates or a ledger type for which to view the costs for a work order. If you do not specify any criteria, the system displays all the charges that were assigned to that work order.

To review charges by work order

On Cost Detail

Figure 11–4 Work Order Cost Detail screen

48211 Work Order Cost Detail

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Document Types
Clear Screen

48211 Work Order Cost Detail

From Date/Period
Thru Date/Period
Ledger Type AR

W.O. Number 1901 Replacement of Air Handl. Unit

Description	Units	Rate	Amount	G/L Date
Total				
Total for Work Order:				

F4=Audit Trail F10=Document Types F24=More Keys

- Complete the following field:
 - Work Order Number
- Complete the following optional fields:
 - From Date/Period
 - Thru Date/Period
 - Ledger Type
- To review additional information, choose Audit Trail (F4).

The system displays additional details about each work order transaction.

Figure 11–5 Work Order Cost Detail (Additional Details) screen

48211 Work Order Cost Detail

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Document Types
Clear Screen

48211 Work Order Cost Detail

From Date/Period
Thru Date/Period
Ledger Type AR

W.O. Number 1901 Replacement of Air Handl. Unit

Description	Units	Rate	Amount	G/L Date
Total				
Total for Work Order:				

Document/Type Account Number
Batch/Date User
Item
Descr

Document/Type Account Number
Batch/Date User
Item
Descr

Total for Work Order:
Document/Type Account Number
Batch/Date User
Item
Descr

F4=Audit Trail F10=Document Types F24=More Keys

11.4.1 What You Should Know About

Topic	Description
Work order cost accounting	All cost accounting for work orders is done within the general ledger using subledger accounting. The work order number is the subledger number, and the subledger type is always W (work order).

Part III

Work Order Reports

This part contains these chapters:

- [Chapter 12, "Overview to Work Order Reports,"](#)
- [Chapter 13, "Print Cost Reports,"](#)
- [Chapter 14, "Print Scheduling and Project Management Reports."](#)

Overview to Work Order Reports

This chapter contains these topics:

- [Section 12.1, "Objectives,"](#)
- [Section 12.2, "About Reports."](#)

12.1 Objectives

- To identify the reports that are available in the Work Orders system
- To use DREAM Writer reports for managing work orders

12.2 About Reports

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

The Work Orders system includes the following types of reports:

- Cost reports
- Scheduling and project management reports

You can print cost reports to review the costs that you associate with work orders. You can review the following information:

- Estimated versus actual hours and costs for work orders
- Details about the cost transactions you charge to work orders

Print scheduling and project management reports to help you manage work order projects. You can use scheduling and project management reports to review:

- Project phase
- Managers assigned to a project
- Messages and remarks that are assigned to work orders
- Planned versus actual hours for work orders
- Start and end points of a project
- Sequence of tasks for a project and any slack time between tasks
- Status for the work orders in a project
- Number of hours remaining or the number of hours charged over the original estimate for each work order in a project

See Also:

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

Print Cost Reports

This chapter contains these topics:

- [Section 13.1, "Printing Cost Reports,"](#)
- [Section 13.2, "Printing the Cost Summary Report,"](#)
- [Section 13.3, "Printing the Cost Detail Report."](#)

13.1 Printing Cost Reports

Print cost reports to review and analyze the costs and individual cost transactions that are associated with work orders. For example, you can verify the actual costs that were incurred by completing the work specified by a work order.

Complete the following tasks:

- Print the Cost Summary report
- Print the Cost Detail report

13.2 Printing the Cost Summary Report

Navigation

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

From **Work Order Processing (G4811)**, choose **Cost Summary**

Print the Cost Summary report to review the cost information on work orders. The report includes:

- Estimated hours and costs for each work order
- Actual hours and costs for each work order
- Difference between the estimated and actual hours and costs for each work order

You can use processing options to enter the report date range.

13.2.1 Processing Options

- See [Section 28.1, "Work Order Cost Summary \(P48497\)."](#)

13.3 Printing the Cost Detail Report

Navigation

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

From Work Order Processing (G4811), choose Cost Detail

Print the Cost Detail report to review detailed information on cost transaction that you charge to work orders. You can use processing options to enter the report date range. The report includes:

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

Figure 13–1 Work Order Cost Detail report

48498				JD Edwards World		Page	-	2		
				Work Order Cost Detail		Date	-	4/26/17		
Phas	Cat	Cat	St	W.O. Number	Work Order Description	Explanation	Explanation 2	Actual Hours	Actual Amount	G/L Date
				MB	4415 Bearing Replacement	Inventory Issue	Bearings, Roller		765.00	05/28/13
				MJ	3071 Too noisy - inspect/rep	Labor Billing Distributio	Regular	1.00	19.75	03/23/17
				MJ	1013 Inspect Bearings	Labor Billing Distributio	Regular	1.00	19.75	01/20/17
						Labor Billing Distributio	Regular	.50	12.64	01/20/17
				MJ	1336 Replace Rubber Grids	Inventory Issue	Couplings		204.00	02/16/17
						Inventory Issue	Rubber Grids		220.00	02/16/17
						Labor Billing Distributio	Regular	1.00	31.43	02/16/17
						Labor Billing Distributio	Regular	.50	8.98	02/16/17
				MJ	2043 Replace Hydraulics	Inventory Issue	Motor, 1/2 HP		27.50	03/18/17
						Inventory Issue	Hydraulic Pump		1,500.00	03/18/17
						Labor Billing Distributio	Regular	1.50	29.63	03/18/17
						Labor Billing Distributio	Regular	1.75	42.40	03/18/17
						A & D Parts Company	Hydraulic fluid/seals		39.95	03/31/17
				MJ	3459 Replace Rubber Grids	Inventory Issue	Couplings		204.00	03/25/17
						Inventory Issue	Rubber Grids		220.00	03/25/17
						Labor Billing Distributio	Regular	1.00	19.75	03/25/17
						Labor Billing Distributio	Regular	.50	12.64	03/25/17
				MJ	3483 Replace Rubber Grids	Inventory Issue	Couplings		204.00	04/08/17
						Inventory Issue	Rubber Grids		220.00	04/08/17
						Labor Billing Distributio	Regular	1.00	19.75	04/08/17
						Labor Billing Distributio	Regular	.50	8.98	04/08/17
				MJ	3505 Lubricate Bearings	Labor Billing Distributio	Regular	1.00	31.43	04/17/17
						Labor Billing Distributio	Regular	.50	8.98	04/17/17
				MJ	3514 Replace Rubber Grids	Inventory Issue	Couplings		204.00	05/18/17
						Inventory Issue	Rubber Grids		220.00	05/18/17
						Labor Billing Distributio	Regular	1.00	19.75	05/18/17
						Labor Billing Distributio	Regular	2.00	50.54	05/18/17
				MJ	3536 Replace Rubber Grids	Inventory Issue	Couplings		204.00	06/01/17
						Inventory Issue	Rubber Grids		220.00	06/01/17
						Labor Billing Distributio	Regular	1.00	19.75	06/01/17
						Labor Billing Distributio	Regular	.50	12.64	06/01/17
				F1	3287 Won't Start	Labor Billing Distributio	Regular	1.25	39.29	06/15/17
				F4	3261 Hydraulic fluid leak	Labor Billing Distributio	Regular	2.00	43.00	04/01/17
						A & D Parts Company	Hydraulic Fluid		36.00	04/04/17
				F4	3279 Won't Start	Labor Billing Distributio	Regular	1.00	19.75	06/15/17
				F6	3252 Brake repair	Labor Billing Distributio	Regular	4.75	117.56	04/01/17
						A & D Parts Company	Brake Parts		127.50	04/04/17
								25.25	5,204.34	

13.3.1 Processing Options

- See [Section 28.2, "Work Order Cost Detail \(P48498\)."](#)

Print Scheduling and Project Management Reports

This chapter contains these topics:

- [Section 14.1, "Printing Scheduling and Project Management Reports,"](#)
- [Section 14.2, "Printing the Work Order Status Summary Report,"](#)
- [Section 14.3, "Printing the Gantt Chart Report,"](#)
- [Section 14.4, "Printing the Task Detail Report,"](#)
- [Section 14.5, "Printing the Punch List Report,"](#)
- [Section 14.6, "Printing the Project Status Summary Report."](#)

14.1 Printing Scheduling and Project Management Reports

You can print scheduling and project management reports to review and manage information about the work orders that you group into a project. You can review information about the specific tasks that are associated with a project, resource requirements, and so on. For example, you can print detailed and summary status information for work orders by manager.

Complete the following tasks:

- Printing the Work Order Status Summary Report
- Printing the Gantt Chart Report
- Printing the Task Detail Report
- Printing the Punch List Report
- Printing the Project Status Summary Report

14.2 Printing the Work Order Status Summary Report

Navigation

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

From Work Order Processing (G4811), choose Status Summary

Print the Work Order Status Summary report to review the detailed information that is associated with your work orders. You can use this report to track and compare the progress of selected work orders. The Work Order Status summary report includes:

- Number of hours planned for each work order

- Number of actual hours charged as of the date you specify for the report
- Difference between hours planned and hours charged to date

You can use a processing option to control the format that the system uses to print equipment numbers on this report.

14.2.1 Processing Options

- See [Section 28.3, "Work Order Summary Status - by Business Unit \(P48496\)."](#)
- See [Section 28.4, "Work Order Summary Status - by Phase Code \(P48496\)."](#)

14.3 Printing the Gantt Chart Report

Navigation

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

From Simple Project Management (G4812), choose Gantt Chart

Gantt chart is a graph that displays time on the horizontal axis and tasks on the vertical axis. The chart gives you a graphical representation of start and end dates of any series of tasks within a project.

When you use a Gantt Chart, you can:

- Review tasks quickly
- Identify which tasks precede others
- Determine if any tasks overlap
- Review slack time between tasks

You can use processing options to enter a date for the chart and choose a monthly or weekly spreadsheet.

14.3.1 Processing Options

- See [Section 28.5, "Print Work Order Gantt Chart \(P48440\)."](#)

14.4 Printing the Task Detail Report

Navigation

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

From Simple Project Management (G4812), choose Task Details

Print the Task Detail report to review a list of the work orders that are included in a project. For each work order in a project, the report includes:

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

- Any standard procedures

Figure 14–1 Detailed Task Description report

48492	JD Edwards World			2
	Detailed Task Description			4/26/17
Phase. . .		Assigned To	Hours	
W.O. Numb.	1986	Honda Accord 3000 mile maint		
		Honda Accord 3000 mile maint		
		Honda Accord 3000 mile maint		
Message No	VEHICLE	Allen, Ray	3.00	
These are general guidelines when working on any vehicle.				
1. Check tires for wear				
2. Check windshield for damages				
3. Check for body damage				
Look up the transmission diagnostic data in the Shop				
Manual. It seems to be hard to shift and is making a low				
level grinding noise.				

14.5 Printing the Punch List Report

Navigation

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

From Simple Project Management (G4812), choose Punch List

Print the Project Punch List report to review a summary of the work that was requested and completed for each work order in a project.

The left side of the report includes the following information about the work that you requested when you created a work order:

- Planned completion date
- Work order number and brief description
- Full description of the work order
- Any standard procedures

The right side of the report includes the following information about the work that has been completed or is currently in progress for each work order:

- Current status and status comment
- Final disposition of the work order (if applicable)

The report accesses information for the full description and the final disposition from record types A and B.

See Also:

- [Section 3.4, "Entering Descriptive Information for Work Orders"](#) for more information about record types.

14.6 Printing the Project Status Summary Report

Navigation

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

From Simple Project Management (G4812), choose Status Summary

Print the Project Status Summary report to review detailed and summary status information about all the projects that are assigned to a specific manager. The report lists:

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

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

Part IV

System Setup

This part contains these chapters:

- [Chapter 15, "Overview to System Setup,"](#)
- [Chapter 16, "Set Up User-Defined Codes,"](#)
- [Chapter 17, "Set Up Standard Procedures,"](#)
- [Chapter 18, "Set Up Default Managers and Supervisors,"](#)
- [Chapter 19, "Set Up Work Order Approvals,"](#)
- [Chapter 20, "Set Up Formats for Record Types,"](#)
- [Chapter 21, "Set Up Work Order Supplemental Data,"](#)
- [Chapter 22, "Set Up Accounting Rules for Work Orders."](#)

Overview to System Setup

This chapter contains these topics:

- [Section 15.1, "Objectives,"](#)
- [Section 15.2, "About System Setup."](#)

15.1 Objectives

- To set up the information necessary to use the Work Orders system
- To set up optional features of the Work Orders system

15.2 About System Setup

Before you use the Work Orders system, you need to define certain information that the system uses during processing. Use this information to customize the system for your business needs.

System setup consists of the following tasks:

- Setting up user defined codes
- Setting up standard procedures
- Setting up default managers and supervisors
- Setting up work order approvals
- Setting up formats for record types
- Setting up work order supplemental data
- Setting up accounting rules for work orders

Set Up User-Defined Codes

This chapter contains the topic:

- [Section 16.1, "Setting Up User-Defined Codes."](#)

16.1 Setting Up User-Defined Codes

Navigation

From Work Order/Service Billing Processing (G48), enter 29

From Work Order/Service Billing Setup (G4841), choose User-Defined Codes

From User-defined Codes (G4842), choose an option

You set up user-defined codes to customize the Work Orders system for your particular business needs. Although a number of defaults are provided with the Work Orders system, you can revise them and set up new defaults to meet the needs of your business environment.

The system stores user-defined codes in tables that relate to a specific system and code type. For example, 00/TY represents system 00 (Foundation Environment) and user-defined code list TY (Type Codes). User-defined code tables determine which codes are valid for the individual fields in your system. If you enter a code that is not valid for a field, the system displays an error message.

You can access all user-defined code tables through a single user-defined code form. After you select a user-defined code form from a menu, you change the system code and the user-defined code to access another user-defined code table.

Caution: User-defined codes are central to JD Edwards World systems. You must be thoroughly familiar with user-defined codes before you change them.

The following user-defined codes are the primary codes for the Work Orders system:

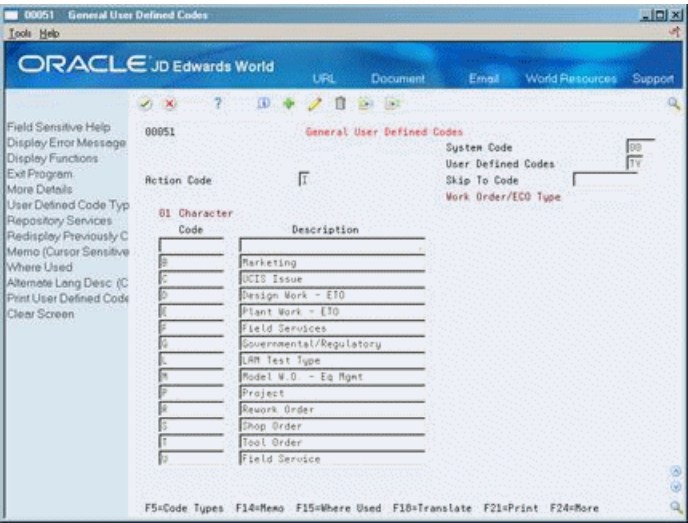
User-defined code	Description
Type codes (00/TY)	Type codes classify work orders by type. The system displays this classification code on both Enter Work Orders and Scheduling Workbench.
Priority codes (00/PR)	Priority codes classify work orders by priority. The system displays this classification code on both Enter Work Orders and Scheduling Workbench.

User-defined code	Description
Status codes (00/SS)	Status codes classify work orders by current condition. You can update the status code for a work order as work progresses. The system displays this classification code field on both Enter Work Orders and Scheduling Workbench.
Category Code 01 (00/W1)	<p>Category code 01 is a four-character user-defined code that appears on all Work Orders forms and reports. Use category code 01 for the work order phase or matter codes. Use phase or matter codes to:</p> <ul style="list-style-type: none"> Group work orders together into phases or subcategories for project management and cost accounting purposes Group work orders on invoices by special matter or explanation code <p>If you do not use category code 01 for phase and matter codes, delete all predefined codes except the blank phase code.</p>
Additional category codes (00/W2-W0)	Category codes 02-10 (system 00, types W2-W0) have no predefined values. The system displays category codes 02 and 03 on the Scheduling Workbench. Use these codes to limit your search for work orders on the Scheduling Workbench. Use category codes 04-10 to customize and further define the Work Orders system.
Record type codes (00/RT)	<p>Use record type codes to divide and organize the descriptive information that you enter and track for your work orders. For example, you might set up record types to include the following types of information:</p> <ul style="list-style-type: none"> Tool and equipment instructions Safety provisions Equipment down time <p>See Section 3.4, "Entering Descriptive Information for Work Orders" for information about applying record types to work orders.</p>
Standard procedures (48/SN)	<p>Use standard procedures to create a table of valid codes specific to your work order needs. You can use these codes to associate a work order or a group of work orders with general message text that you enter on General Message.</p> <p>See Section 17.1, "Setting Up Standard Procedures" for more information about using standard procedures codes and general messages.</p>
Work order databases (00/WD)	<p>Use work order databases to group supplemental data types for work orders. You can define as many supplemental data types as you need for a specific work order database.</p> <p>See Section 21.1, "Setting Up Work Order Supplemental Data" for more information.</p>

To set up user-defined codes

On any user-defined codes form

Figure 16–1 General User Defined Codes screen



1. To locate the user-defined code table that you want to set up or revise, complete the following fields:
 - System Code
 - User-defined Codes
2. To revise the user-defined code table, complete the following fields:
 - Character Code
 - Description

16.1.1 What You Should Know About

Topic	Description
Applying category codes to work orders	<p>You must apply the category codes to work orders for the codes to be effective. Apply category codes to a specific work order on Enter Work Orders.</p> <p>See Section 3.3, "Assigning Additional Information to Work Orders" for more information.</p>
Default values for classification codes	<p>You can set the processing options for Enter Work Orders so the system assigns default values for classification codes on work orders.</p> <p>See Section 3.1, "Creating Work Orders" for more information.</p>
Defining blank as a valid user-defined code value	<p>If you set up a user-defined code that does not require a value, you must define "blank" as a valid value. To do so, leave the Character Code field blank and enter at least one character in the Description field. JD Edwards World recommends that you type a period in the last position of the field.</p>

See Also:

- *JD Edwards World Technical Foundation Guide* for more information about setting up user-defined codes.

16.1.2 Processing Options

- See [Section 29.1, "General User-Defined Codes \(P0005A\)."](#)

Set Up Standard Procedures

This chapter contains these topics:

- [Section 17.1, "Setting Up Standard Procedures,"](#)
- [Section 17.2, "Setting Up Standard Procedures Codes,"](#)
- [Section 17.3, "Entering Text for a Standard Procedures Code,"](#)
- [Section 17.4, "Copying Text from One Code to Another."](#)

17.1 Setting Up Standard Procedures

You can define standard procedures and general messages to:

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

You can set up standard procedures that are specific to your work order needs. Use the user defined code table 00/SN to set up a table of codes for the standard procedures that you want to enter for the Work Orders system. You can enter as much information as you need to describe or give instructions for each standard procedure. The system automatically links this information to the appropriate code. After you set up your standard procedure codes and enter the necessary text, you can use the codes to associate a work order or a group of work orders with the standard procedure that you establish for the code.

This section contains the following:

- Setting Up Standard Procedures Codes
- Entering Text for a Standard Procedures Code
- Copying Text from One Code to Another

17.2 Setting Up Standard Procedures Codes

Navigation

From Work Order/Service Billing Processing (G48), enter 29

From Work Order/Service Billing Setup (G4841), choose Standard Procedures

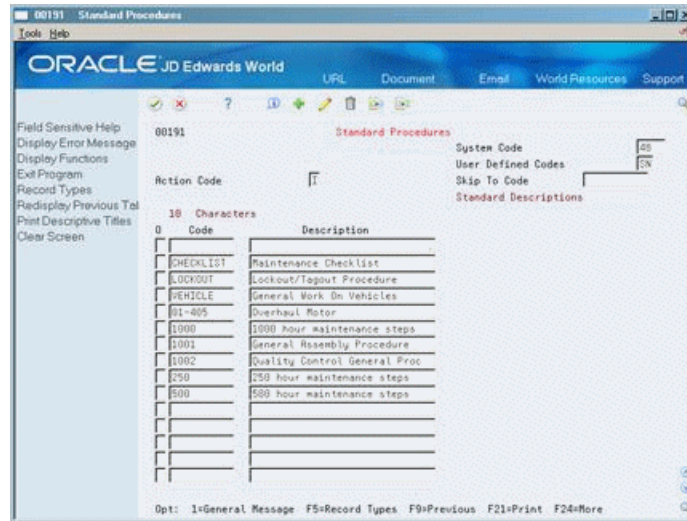
You must set up a table of codes to describe each standard procedure. For example, for a maintenance environment in which you create work orders to perform a 1000-hour inspection, you might set up a standard procedure code called 1000-hour. You can

associate the standard procedure code called 1000-hour with each work order for which that code is appropriate.

To set up standard procedures codes

On Standard Procedures

Figure 17–1 Standard Procedures screen



To set up standard procedure codes to the user defined codes table, complete the following fields:

- Code
- Description

17.2.1 Processing Options

See [Section 29.2, "Generic Rate/Message Records Program \(P00191\)."](#)

17.3 Entering Text for a Standard Procedures Code

Navigation

From Work Order/Service Billing Processing (G48), enter 29

From Work Order/Service Billing Setup (G4841), choose Standard Procedures

After you set up standard procedure codes, you can enter unlimited text for brief or detailed instructions that apply to each code. For example, assume that you have set up a standard procedure code for 1000-hour inspections. You might enter text that specifies that for 1000-hour inspections, the technician should always:

- Check coolant level
- Record vibration readings
- Adjust belt tension

The system automatically associates the information that you enter with the standard procedure code.

To enter text for a standard procedures code

On Standard Procedures

1. Choose General Message for the standard procedure code to which you want to associate the information.

Figure 17-2 General Message screen

2. On General Message, enter the information that you want to associate to the standard procedures code.

The system clears the form.

3. To return to Standard Procedures, choose Program Exit.

17.4 Copying Text from One Code to Another

Navigation

From Work Order/Service Billing Processing (G48), enter 29

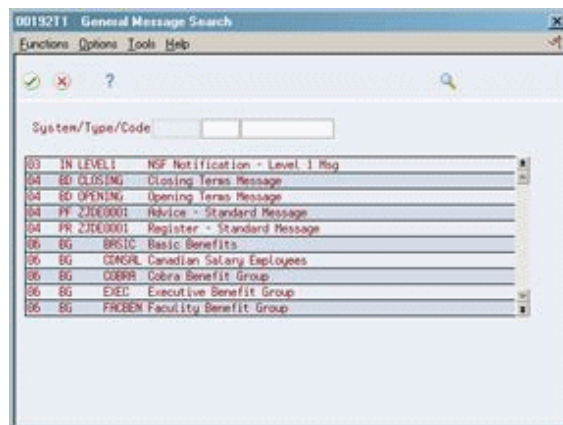
From Work Order/Service Billing Setup (G4841), choose Standard Procedures

You can copy text from one standard procedures code to another. This is particularly useful when a standard procedure contains lengthy text that pertains to other similar procedures. For example, assume that you have set up standard procedures codes for a 1000-hour inspection and a 250-hour inspection. The procedure for the 1000-hour inspection includes all the steps that are normally completed during a 250-hour inspection. You can copy the text from the 250-hour procedure and use it in the 1000-hour procedure.

To copy text from one code to another

On Standard Procedures

1. Choose General Message for the standard procedures code to which you want to copy information.
2. On General Message, choose Message Search (F6).

Figure 17-3 General Message Search screen

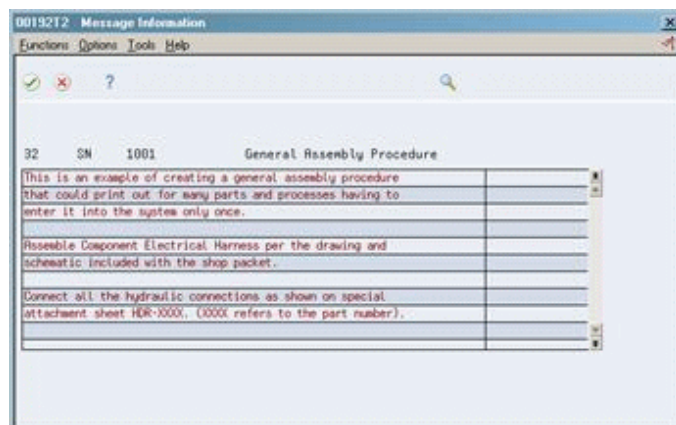
3. On General Message Search, complete the following fields to locate the procedures message from which you want to copy:

- System
- Type
- Code

The system displays a list of the standard procedures codes, starting with the code that you specify. If you do not specify a code, the system displays a list of all the available codes for the system and type that you specify.

4. To indicate the procedure code that contains the text that you want to copy, choose Select.

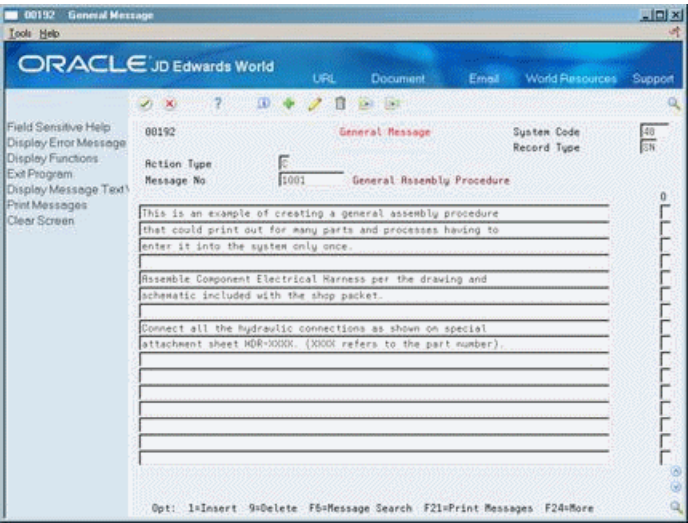
The Message Information window appears, displaying the general message for the procedure code that you selected.

Figure 17-4 Message Information screen

5. Choose Select for each line that you want to copy.

The system copies the selected lines to the general message.

Figure 17–5 General Message (Copied) screen



17.4.1 What You Should Know About

Topic	Description
Changing a general message	You can change a general message for a standard procedure code by entering new text over existing text.

Set Up Default Managers and Supervisors

This chapter contains the topic:

- [Section 18.1, "Setting Up Default Managers and Supervisors."](#)

18.1 Setting Up Default Managers and Supervisors

Navigation

From Work Order/Service Billing Processing (G48), enter 29

From Work Order/Service Billing Setup (G4841), choose Default Managers and Supervisors

You can specify that the system automatically enters the address book information for managers and supervisors when you create work orders. This default information is effective on both Work Order Entry and Scheduling Workbench and is based on any combination of the first three work order category codes.

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

To set up default managers and supervisors

On Default Managers and Supervisors

Figure 18–1 Default Managers and Supervisors screen

1. Complete any combination of the following fields:
 - Phase
 - Category 02
 - Category 03
2. To indicate which supervisor and manager are responsible for the phase and category code values, complete the following fields:
 - Supervisor
 - Manager

You must complete at least one category code field and one field for a manager or supervisor for each version of default managers and supervisors that you set up.

Field	Explanation
Phase	<p>A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.</p> <p>Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.</p>
Category 02	<p>User defined code system 00, type W2, which indicates the type or category of a work order.</p> <p>Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)</p>

Field	Explanation
Category 03	<p>User defined code system 00, type W3, which indicates the type or category of a work order.</p> <p>Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)</p>
Supervisor	<p>The address book number of the supervisor.</p> <p>Note: A processing option for some forms allows you to enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers & Supervisor form. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. You can either accept or override the default value.</p>
Manager	<p>The address book number of a manager or planner.</p> <p>Note: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. (You can either accept or override the default value.)</p>

18.1.1 What You Should Know About

Topic	Description
Activating the default information	You must set the processing options on Enter Work Orders and Project Setup to use the default values that you set up for the manager and supervisor address book numbers.

Set Up Work Order Approvals

This chapter contains these topics:

- [Section 19.1, "Setting Up Work Order Approvals,"](#)
- [Section 19.2, "Setting Up Work Order Activity Rules,"](#)
- [Section 19.3, "Setting Up Work Order Approval Routes,"](#)
- [Section 19.4, "Setting Up User Profiles."](#)

19.1 Setting Up Work Order Approvals

You can control approvals for a work order by establishing work order activity rules and approval routing.

This section contains the following:

- Setting Up Work Order Activity Rules
- Setting Up Work Order Approval Routes
- Setting Up User Profiles

19.2 Setting Up Work Order Activity Rules

Navigation

From **Work Order/Service Billing Processing (G48)**, enter **29**

From **Work Order/Service Billing Setup (G4841)**, choose **Work Order Activity Rules**

You can define work order activity rules that differ by work order document type and work order type. Use work order activity rules to:

- Determine the status of a work order at any point in the life cycle
- Select work orders for certain procedures
- Prepare reports that are based on a work order's current status
- Specify whether the work order is active or inactive at a particular status

To set up work order activity rules

On **Work Order Activity Rules**

Figure 19–1 Work Order Activity Rules screen

- To locate a classification of work orders, complete the following fields:
 - Order Type
 - Type
- To define the activity rules for that classification of work orders, complete the following field:
 - Work Order Status
- Complete the following optional fields:
 - Next Status
 - Other Allowed Statuses

You must define a status code as a work order status in the work order activity rules table before you can use it as a next status or other allowed status.

- Access the detail area (F4).

Figure 19–2 Work Order Activity Rules (Details) screen

5. Complete the following optional fields:

- Subledger Inactive
- Lock

Caution: If you have defined a status code on the activity rules table as a next status or other allowed status, you should not delete the status code from the activity rules table.

Field	Explanation
Order Type	<p>A user defined code (00/DT) that identifies the type of document. The Engineering Change Management system uses type EN for engineering change orders.</p> <p><i>Form-specific information</i></p> <p>Enter the work order document type for which these rules apply.</p>
Type	<p>A user defined code (system 00, type TY) that indicates the type classification of a work order or engineering change order.</p> <p>You can use work order type as a selection criteria for work order approvals.</p>
Skip to Work Order Status	<p>A user defined code (system 00, type SS) that describes the status of a work order or engineering change order. Any status change from 90 thru 99 automatically updates the date completed.</p>

19.2.1 What You Should Know About

Topic	Description
Setting up reject codes	You must set up a reject code as the last status for any set of activity rules that you define for work orders.

19.3 Setting Up Work Order Approval Routes

Navigation

From Work Order/Service Billing Processing (G48), enter 29

From Work Order/Service Billing Setup (G4841), choose Work Order Approval Routing

You can create a variety of approval routes for all the individuals who need to receive notification when a work order requires their approval.

Use the address book number of the individual that is responsible for the approval to include them in an approval route. You can also establish specific approval routes based on:

- Document type
- Work order type
- Work order status
- Approval type

- Dollar amount

To set up work order approval routes

On Work Order Approval Routing

Figure 19–3 Work Order Approval Routing screen

P	Seq	Amount	Address Number	Name	Reject Status
	1.00		6414	O'Malley, James P.	RR
	2.00	500.00	6427	Brown, Harvey J.	RR
	3.00	1,000.00	9003	Williams, Wendy	RR
	4.00	10,000.00	6446	McGuire, Holly S.	RR

- To locate the approval route that you want to set up or review, complete the following fields:
 - Order Type (document type)
 - Type (work order type)
 - Approval Type
 - Status
- To set up the approval route, complete the following fields:
 - Sequence
 - Amount
 - Address Number
 - Reject Status

Field	Explanation
Approval Type	A user defined code (system 48, type AP) indicating the type of work order approval path that a work order follows. You can use processing options to specify a default approval type based on the type of work order.
Seq	<p>A number that the system uses to sequence information.</p> <p><i>Form-specific information</i></p> <p>You can set up alternate approvers at any sequence. If you set up more than one approver at a sequence, only one of the approvers at that sequence needs to approve the work order.</p>

Field	Explanation
Amount	<p>A number that identifies the actual amount. Type debits with no sign or a plus sign (+). Type credits with a minus sign (-) either before or after the amount. You can use decimals, dollar signs, and commas. The system ignores non-significant symbols.</p> <p><i>Form-specific information</i></p> <p>The estimated amount on the work order over which the approver needs to approve the work order.</p>
Address Number	<p>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.</p> <p><i>Form-specific information</i></p> <p>Enter the address number of the person who can approve the work order.</p>
Reject Status	<p>The reject status is the status that the work order will default to if an approver rejects a work order.</p>

19.4 Setting Up User Profiles

Navigation

From Security Officer (G9401), choose User Information

From the Security Officer menu (G94), choose User Information.

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

To set up user profiles

On User Information

Figure 19–4 User Information screen

The screenshot shows the 'User Information' screen in Oracle JD Edwards World. The title bar indicates '0092 User Information'. The screen is divided into several sections. On the left, there is a 'Field Sensitive Help' menu. The main area contains fields for 'User ID' (0092), 'User Key', 'Initial Menu to Execute', 'Initial Program to Execute', 'User Security', 'User Type', 'User Class/Group', 'Batch Job Queue', 'Job Scheduling Priority', 'Logging(level/severity/messages)', 'Output Queue', 'Optional Printer File Library', 'Current Library', 'Employee Address Number (PPAT)', 'Set Attention Program', and 'Action Code' (RF77530 Robert Farris). The bottom of the screen shows a list of functions and their corresponding action codes: F6=Display/Language, F9=Library Inquiry, F21=Print Lib List, and F24=More.

1. Locate a user by completing the following field:
 - User ID
2. Complete the following field:
 - Employee Address Number (PPAT)

Set Up Formats for Record Types

This chapter contains the topic:

- [Section 20.1, "Setting Up Formats for Record Types."](#)

20.1 Setting Up Formats for Record Types

Navigation

From Work Order/Service Billing Processing (G48), enter 29

From Work Order/Service Billing Setup (G4841), choose Detail Spec. Over Titles

You use record types to organize the detail information that you track for work orders. For example, you can organize information, such as original task description, tools required, safety provisions, and so on. You can use Detail Specification Over Titles to control the format for these record types.

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

- Setup
- Production
- Tear-down and clean-up

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

You can review record types, formats, and column headings on Work Order Detail Entry.

20.1.1 Before You Begin

- Set up work order record types. See [Section 16.1, "Setting Up User-Defined Codes"](#) for more information about setting up work order record types.

To set up formats for record types

On Detail Spec. Over Titles

Figure 20–1 *Detail Spec. Over Titles screen*

1. Complete the following field:
 - Record Type
2. To define text for column headings, complete the following fields:
 - Sub-Title 1
 - Sub-Title 2
 - Sub-Title 3

20.1.2 What You Should Know About

Topic	Description
Changing the format for a record type	When you change the format of a record type, the system updates the format of that record type for all work orders.

Set Up Work Order Supplemental Data

This chapter contains the topic:

- [Section 21.1, "Setting Up Work Order Supplemental Data."](#)

21.1 Setting Up Work Order Supplemental Data

Navigation

From Work Order/Service Billing Processing (G48), enter 29

From Work Order/Service Billing Setup (G4841), choose Define Your Own Data Types

Use supplemental data to further define the work orders in your system. You can use supplemental data to report and track work order details that are important to your company, but are not included in the record types. You can define as many types of supplemental data as you need.

You define and maintain supplemental data by work order database. Work order databases are user defined (system 00, type WD). For example, you might set up supplemental data for an engineering change order database. The data types might include detail types, pending orders, and so on.

21.1.1 Before You Begin

Set up the user defined codes table for the valid work order databases with which you want to associate supplemental data. See [Section 16.1, "Setting Up User-Defined Codes"](#) for more information.

Verify that you have installed the Time Accounting and Human Resources Management Base, or the Payroll system.

To set up work order supplemental data

On Define Your Own Data Types

[illegible]

1. To specify a work order database, complete the following field:
 - Work Order Data Base
2. To define a data type, complete the following fields:
 - Type Data
 - Description
 - Display Format - Code or Order (CO)
3. Complete the following optional fields:
 - Code Title
 - Quantity Title
 - Amount Title
 - System Code (Cod)
 - User Defined Code (RT)
4. Choose More Detail (F4).

Figure 21–2 Define Your Own Data Types (Detail) screen

5. Complete the following optional fields:

- Date Title
- Remark Title
- Days Title
- Order Title
- Type Title

Field	Explanation
Work Order Data Base	The code representing what Work Order Data Base is to be used.
Ty Dt	User defined code system 00, type WT, which indicates the type of data being entered within the supplemental database. The code is often an abbreviation for the data it represents, for example, EC might represent Engineering Change.
C/O O	<p>A code that determines the display mode for Supplemental Data. Valid codes are:</p> <p>C – Automatically takes you to the Data Entry program where you can enter code-specific information. The code values you enter can be edited against values in the User Defined Codes file (F0005).</p> <p>O – Automatically takes you to the Related Order Entry program, bypassing code-specific information. If you use an O, narrative text will not be tied to specific codes.</p>
Code Title	The heading for a column on Supplemental Data Entry that relates to user defined codes. Enter the user defined codes for the supplemental data type in this column. For example, if the supplemental data type relates to the educational degrees of employees (BA, MBA, PHD, and so on), the heading could be Degree.
Code	A user defined code (98/SY) that identifies a JD Edwards World system.
RT	Identifies the table that contains user defined codes. The table is also referred to as a code type.

21.1.2 What You Should Know About

Topic	Description
Defining user defined codes as valid values for a data type	<p>You can set up your system to edit the values that you enter on supplemental data forms against the values that you set up in user defined code tables. Use the following guidelines to define user defined codes as valid values for a data type:</p> <ul style="list-style-type: none">■ You must set up the user defined code table before you can set up the data type.■ To assign a user defined code table to a data type, specify the install system and code type in the Edit on Code and Edit on RT fields.■ If your specification data type does not relate to an existing user defined code or generic message code, you can set up a new user defined code table. JD Edwards World recommends that you define the new tables for install systems 55 through 59. User defined code tables that you create for these systems are not modified during any reinstall processes. <p>See the <i>JD Edwards World Technical Foundation Guide</i> for more information about user defined codes.</p>

21.1.3 Processing Options

- See [Section 29.3, "Work Order Data Base \(P48090\)."](#)

Set Up Accounting Rules for Work Orders

This chapter contains the topic:

- [Section 22.1, "Setting Up Accounting Rules for Work Orders."](#)

22.1 Setting Up Accounting Rules for Work Orders

Navigation

From Time Accounting System (G05), enter 29

From Time Accounting Setup (G054), choose Payroll Constants and Tables

From Additional Constants and Tables (G0541), choose Debit Labor/Billing/Equipment

Alternatively, you can also access the Accounting Rules Table from Payroll. On the Payroll Master Menu (G07) enter 29. From the Setup menu (G074), choose Automatic Accounting Instructions. From the Automatic Accounting Instructions menu (G074), choose Debit - Direct Labor/Billings/Equipment.

If you apply charges to work orders using the speed entry code on Time Accounting or Payroll forms, you must set up your system to distribute the charges to the proper object account. You set up these object accounts on the Accounting Rules table.

At a minimum, you must set up an object account for default company 00000. You can set up object accounts for other companies as well. The system always searches for accounting rules by a specific company. If no company is found, the system applies rules according to the default company.

22.1.1 Before You Begin

- Verify that you have installed one of the following systems:
 - Time Accounting and Human Resources Management Base (system 05)
 - Payroll (system 07)
 - Payroll (Canadian system 77)

To set up the accounting rules for work orders

On Debit-Labor/Billing/Equipment

Figure 22-1 Debit-Labor/Billing/Equipment screen

069043 Debit-Labor/Billing/Equipment

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Exit Program
Account Master
Clear Screen

069043 Debit-Labor/Billing/Equipment

Action Code: [C]
Company: 00050 A Model Construction Mgmt Co
Skip to B. Unit: []

Employee or Time Card Basis							Distribution Account		
Bus. Unit	Union	Type	Step	Typ	JT	Descr.	Bus. Unit	Obj	Sub
						ED Distrib-Eq		1355	
						ED Distrib-Eq		1355	
						ED Distrib-La		1341	
						ED Distrib-La		1341	
						ED Overtime		1342	
						ED Holiday Pa	50	0115	
50						ED Distrib-La	50	0115	
SHOP						RD Regular		0402	
SHOP						RD Overtime 1		0403	
YARD						RD Regular		0402	
YARD						RD Regular		0402	
YARD						RD Overtime 1		0403	

F5=Account Master F24=More Keys

1. Complete the following fields:
 - Distribution Account - Object
 - Journal Type
2. Complete the following optional fields:
 - Employee or Time Card Basis - Business Unit
 - Type

Part V

Global Updates

This part contains these chapters:

- [Chapter 23, "Overview to Global Updates,"](#)
- [Chapter 24, "Update the Phase and Equipment Number,"](#)
- [Chapter 25, "Purge Closed Work Orders."](#)

Overview to Global Updates

This chapter contains these topics:

- [Section 23.1, "Objectives,"](#)
- [Section 23.2, "About Global Updates."](#)

23.1 Objectives

- To globally update the phase code in the general ledger
- To purge work orders

23.2 About Global Updates

Use global update programs to update the work order information in your system or to make system-wide changes that affect all your work orders.

Running global updates consists of the following tasks:

- Updating the phase and equipment number
- Purging closed work orders

Update the Phase and Equipment Number

This chapter contains the topic:

- [Section 24.1, "Updating the Phase and Equipment Number."](#)

24.1 Updating the Phase and Equipment Number

Navigation

From Work Order/Service Billing Processing (G48), enter 27

From Work Order/Service Billing Advanced Operations (G4831), choose Update Phase/Equipment Number in the General Ledger

If you post work order transactions to the general ledger and then change the equipment number and the phase code on the work order, you should run this update to ensure that the Account Ledger table (F0911) reflects the most current work order information. You can use this program to reflect changes to the phase code and equipment number for multiple work orders. You can also use this program to enter a value in the phase field on many general ledger transactions.

When you select Update Phase/Equipment Number in the general ledger, the program submits the job directly to batch processing

24.1.1 Before You Begin

- Back up the Work Order Master table (F4801)
- Verify that no one accesses or modifies the Work Order Master table while you run this procedure

Purge Closed Work Orders

This chapter contains the topic:

- [Section 25.1, "Purging Closed Work Orders."](#)

25.1 Purging Closed Work Orders

Navigation

From Work Order/Service Billing Processing (G48), enter 27

From Work Order/Service Billing Advanced Operations (G4831), choose Purge Closed Work Orders

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

The Purge Closed Work Orders program deletes the work order records that you specify in DREAM Writer selection, including any record types and approval records that are associated with the selected work order records. The program does not create a purge table or a report.

Part VI

Processing Options

This part contains these chapters:

- [Chapter 26, "Work Order Creation Processing Options,"](#)
- [Chapter 27, "Work Order Processing - Processing Options,"](#)
- [Chapter 28, "Work Order Reports Processing Options,"](#)
- [Chapter 29, "System Setup Processing Options."](#)

Work Order Creation Processing Options

This chapter contains these topics:

- [Section 26.1, "Project Detail Entry \(P48014\),"](#)
- [Section 26.2, "Work Order Profile Inquiry \(P480200\),"](#)
- [Section 26.3, "Default Values for Speed Project Setup \(P48015\)."](#)
- [Section 26.4, "Work Order Category Revisions - Z File \(P48016Z\),"](#)

26.1 Project Detail Entry (P48014)

Processing Option	Processing Options Requiring Further Description
DEFAULT PROCESSING:	
1. Enter the defaults for the following:	
Type	
Priority	
Beginning Status	
Phase or Matter (Cat. Code 1)	
Category Code 2	
Category Code 3	
2. Enter a '1' to default the manager and supervisor based on the values for Category Codes 1, 2, and 3.	
3. Enter the work order approval type to be used in the approval process.	

26.2 Work Order Profile Inquiry (P480200)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTION:	
1. Enter the Work Order Data Base. Only Data Types with this Data Base will be displayed on the screen.	
Leave blank to default Data Base "E" (Engineering Change Orders).	

26.3 Default Values for Speed Project Setup (P48015)

Processing Option	Processing Options Requiring Further Description
DEFAULT PROCESSING:	
1. Enter a '1' to default the manager and supervisor based on the values for Category Codes 1, 2, and 3.	
2. Enter the defaults for the following fields:	
Type	
Priority	
Beginning Status	
Phase (Category Code 1)	
Category Code 2	
Category Code 3	
PROGRAM SELECTION:	
3. Choose the work order entry program to call when the option exit is used:	
'2' = Equipment Work Order (P48011)	
'3' = Work Order Entry (SAR) (P48012)	
'4' = Manufacturing Work Order (P48013) (default)	
'5' = Project Task Details (P48014)	

26.4 Work Order Category Revisions - Z File (P48016Z)

Processing Option	Processing Options Requiring Further Description
ERROR REPORTING:	
1. Enter '1' to suppress error report. If left blank, report will be generated.	
2. Enter version of error report program (P41ZERR). If left blank, XJDE0001 will be used.	

Work Order Processing - Processing Options

This chapter contains these topics:

- [Section 27.1, "Scheduling Workbench - Work Order Entry \(P48201\),"](#)
- [Section 27.2, "Work Order Approval \(P4828\),"](#)
- [Section 27.3, "Speed Voucher Entry \(P041015\)."](#)

27.1 Scheduling Workbench - Work Order Entry (P48201)

Processing Option	Processing Options Requiring Further Description
DEFAULT PROCESSING:	
1. Enter a Work Order Status range if you want to default values into the Status fields on the screen. Leave blank for no default. From Status: To Status:	
2. Enter a Work Order Type if you want to default a value into the Type field on the screen. Leave blank no default.	
3. Enter the Purchase Order Status below which are active orders and a soft warning will be given when completing a Work Order. Leave blank to give no warnings about active Purchase Orders when completing a Work Order.	
4. Enter defaults for the following: Phase (Cat. Code 1) Category Code 2 Category Code 3 Business Unit Originator Planner Manager Supervisor	
PROGRAM SELECTION:	

Processing Option	Processing Options Requiring Further Description
5. Choose the work order entry program to call when option exit is used: '1' = Project Task Details (P48014) (default) '2' = Equipment Work Orders (P48011) If Equipment Work Orders (P48011) chosen, enter version. (Default is ZJDE0001)	
6. Enter the Dispatch Group to default when calling the Summary Capacity Messages screen (P3301).	
7. Enter the version of the Equipment Work Order Print to run when using the option. Default of blank will use version XJDE0001. Note: This option is only valid if system 13 (Equipment) is available.	
8. Enter the version of the Completed PM screen to display when using the option. Default of blank will use version ZJDE0001. Note: This option is only valid if system 13 (Equipment) is available.	
9. Enter the DREAM Writer version of Open Order Inquiry (P430301) to call. Default of blank will use version ZJDE0006.	
FORMAT CONTROL:	
10. Enter a '1' to display the Equipment Management screen format. Enter a '2' to display the alternate Equip. format with the Assigned To field on the first detail line. Leave blank (Default) to display the Work Order screen format.	

27.2 Work Order Approval (P4828)

Processing Option	Processing Options Requiring Further Description
DEFAULTS:	
1. Enter the default Document Type for the screen to inquire on.	
2. Enter the default Work Order Type for the screen to inquire on.	
3. Enter the default Approval Type for the screen to inquire on.	

27.3 Speed Voucher Entry (P041015)

Processing Option	Processing Options Requiring Further Description
FIELD DISPLAY CONTROL:	

Processing Option	Processing Options Requiring Further Description
1. Enter '1' to select the following capabilities of this program: Sales/Use/VAT Tax Processing PO Number Entry Extra Date for Service/Tax	
2. You may activate certain capabilities by entering a '1' for the following: Approver Number Entry Category Code 07 Entry	
FORMAT CONTROL:	
3. Enter sequence numbers (1-5) to indicate which formats will appear and in what order. If all are left blank, all formats will appear in the order shown below: Standard Speed Voucher Entry Voucher Entry with Subledger Voucher Entry with F/A Number Voucher Entry with Units Voucher Entry with Phase Code Note: This is used with the Format Selection function key.	
4. Enter a 1 to review the Voucher Category Codes with an Add or Change.	
TWO CYCLE OPTION:	
5. Enter a '1' for 2 Cycle processing.	
DREAM WRITER VERSIONS: Enter the version of each program: If left blank, ZJDE0001 will be used.	
6. A/P Voucher Processing (XT0411Z1)	
7. Journal Entry Processing (XT0911Z1)	
8. Supplier Ledger Inquiry (P042003)	
9. Supplier Master Information (P01054)	
10. Name Search (P01200)	
11. Voucher Category Code Review(P0411W)	
12. Organization Structure Revs (P0150)	
FIELD PROTECTION CONTROL:	
13. Enter a '1' to protect the Pay Status field. If left blank the Pay Status field will be unprotected.	
14. Enter a '1' to protect the Exchange Rate field. If left blank, the Exchange Rate will not be protected.	

Work Order Reports Processing Options

This chapter contains these topics:

- [Section 28.1, "Work Order Cost Summary \(P48497\),"](#)
- [Section 28.2, "Work Order Cost Detail \(P48498\),"](#)
- [Section 28.3, "Work Order Summary Status - by Business Unit \(P48496\),"](#)
- [Section 28.4, "Work Order Summary Status - by Phase Code \(P48496\),"](#)
- [Section 28.5, "Print Work Order Gantt Chart \(P48440\)."](#)

28.1 Work Order Cost Summary (P48497)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the date range for the report.	
Leave blank (default) to include all costs, regardless of their G/L dates.	
From Date:	
Thru Date:	
LEDGER TYPE SELECTION:	
2. Enter a single ledger type.	
Leave blank (default) for "AA" ledger.	

28.2 Work Order Cost Detail (P48498)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the From Date. Leave blank (default) to include all costs with G/L dates up to the Thru Date below.	
2. Enter the Thru Date. Leave blank (default) to include all costs with G/L dates from the From Date forward.	
LEDGER TYPE SELECTION:	
3. Enter a single ledger type.	
Leave blank (default) for "AA" ledger.	

28.3 Work Order Summary Status - by Business Unit (P48496)

Processing Option	Processing Options Requiring Further Description
PRINT OPTION:	
1. Choose one of the following:	
'1' = Print equipment item numbers.	
'2' = Print equipment unit numbers.	
'3' = Print equipment serial numbers.	
' ' = Do not print equipment numbers (default).	
LEDGER TYPE SELECTION:	
2. Enter a single ledger type.	
Leave blank (default) for "AA" ledger.	

28.4 Work Order Summary Status - by Phase Code (P48496)

Processing Option	Processing Options Requiring Further Description
PRINT OPTION:	
1. Choose one of the following:	
'1' = Print equipment item numbers.	
'2' = Print equipment unit numbers.	
'3' = Print equipment serial numbers.	
' ' = Do not print equipment numbers (default).	
LEDGER TYPE SELECTION:	
2. Enter a single ledger type.	
Leave blank (default) for "AA" ledger.	

28.5 Print Work Order Gantt Chart (P48440)

Processing Option	Processing Options Requiring Further Description
DATE SELECTION:	
1. Enter the 'as of' date for the Gantt Chart.	
SPREAD FREQUENCY OPTION:	
2. Enter a '1' to spread the chart monthly.	
Leave blank (default) to spread it weekly.	

System Setup Processing Options

This chapter contains these topics:

- [Section 29.1, "General User-Defined Codes \(P0005A\),"](#)
- [Section 29.2, "Generic Rate/Message Records Program \(P00191\),"](#)
- [Section 29.3, "Work Order Data Base \(P48090\)."](#)

29.1 General User-Defined Codes (P0005A)

Processing Option	Processing Options Requiring Further Description
DEFAULT CODE/TYPE:	
1. Enter the desired Install System Code.	
2. Enter the desired Record Type.	

29.2 Generic Rate/Message Records Program (P00191)

Processing Option	Processing Options Requiring Further Description
USER DEFINED CODES:	
1. Enter the desired System Code.	
2. Enter the desired Record Type.	
DISPLAY INFORMATION:	
3. Enter an '1' to display Rate Text or Enter an '2' to display Message Text	
4. If displaying Message Text, Enter an '1' for 60 column display or Enter an '2' for 80 column display	

29.3 Work Order Data Base (P48090)

Processing Option	Processing Options Requiring Further Description
DEFAULT OPTION:	

Processing Option	Processing Options Requiring Further Description
<p>1. Enter the Work Order Data Base to default on the screen.</p> <p>Leave blank to default Data Base "E" (Engineering Change Orders).</p>	

Functional Servers

This appendix contains the topic:

- [Section A.1, "About Functional Servers."](#)

A.1 About 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.
- Generally, the user interface (appearance and interaction) of a form is now separate from how a program works.

To set up business rules for an entry program

The steps for setting up business rules for an entry program are:

1. Create a DREAM Writer version for a specific functional server program (for example, 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 how to set up DREAM Writer versions, see the *JD Edwards World Technical Foundation Guide*.

A.1.1 Example: Voucher Processing 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)

Import Mass Data into Manufacturing Systems

You can use the Work Order Category Revisions - Z File program (P48016Z) to run Work Order Category Revisions (P48016) in batch mode and accept category codes from the Work Order Category Revisions - Z File (F48016Z). This allows you to process mass amounts of data from an outside source easily and efficiently using existing programs to validate the data.

You can process any number of records to add, change, or delete. You also have the advantage of:

- Data selection to limit the records you want to process.
- Processing options that allow you to choose the version of the interactive program to process the records.
- Error report printing.

See:

- Import Using Z File Processing in the *JD Edwards World Technical Tools Guide* for detailed information about Z file processing.
- Overview to Import/Export in the *JD Edwards World Technical Tools Guide* for information about importing data into the system.

Navigation

From **Manufacturing Z File Processes (G3001Z)**, choose **ECO Header Category Codes**

Processing Options

See [Section 26.4, "Work Order Category Revisions - Z File \(P48016Z\)"](#).

Data Selection

Do not change the existing data selection. The Processed Y/N field is set to NE Y. This prevents the program from processing records more than once.

You can add additional selections to limit the data.

Data Sequence

Do not change the data sequence.

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