JD Edwards EnterpriseOne Applications

Capital Asset Management Implementation Guide

9.2

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Contents

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ORACLE

ORACLE

ORACLE

ORACLE

28 Appendix B - Delivered Workflow for JD Edwards EnterpriseOne Capital Asset Management   453

29 Appendix C - Delivered User Defined Objects for Capital Asset Management (Release 9.2 Update)   459

30 Glossary   461

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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

Documentation Accessibility

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info* or visit *http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs* if you are hearing impaired.

Related Information

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

http://learnjde.com

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
Italics	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`Monospace`	Monospace type indicates commands within a paragraph, URLs, code examples, text that appears on a screen, or text that you enter.
> Oracle by Example	Indicates a link to an Oracle by Example (OBE). OBEs provide hands-on, step- by-step instructions, including screen captures that guide you through a process using your own environment. Access to OBEs requires a valid Oracle account.

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1 Introduction to JD Edwards EnterpriseOne Capital Asset Management

JD Edwards EnterpriseOne Capital Asset Management Overview

The JD Edwards EnterpriseOne Capital Asset Management (CAM) system from Oracle enables you to maintain and service equipment to reduce downtime and repair costs, increase productivity, and improve product quality. You can track the revenue, cost, and use of the assets, and you can use workflow alerts to plan and resolve issues before they become emergencies.

You can use the maintenance features of JD Edwards EnterpriseOne CAM to manage all aspects of equipment and machinery maintenance in the organization, such as:

- Creating equipment register and information.
- Scheduling preventive maintenance.
- Receiving and responding to cases.
- Planning of parts and labor.
- Purchasing parts and materials.
- Assigning resources.
- Tracking the status of preventive and corrective tasks.

JD Edwards EnterpriseOne Capital Asset Management Business Processes

This diagram illustrates the JD Edwards EnterpriseOne CAM business process flow:

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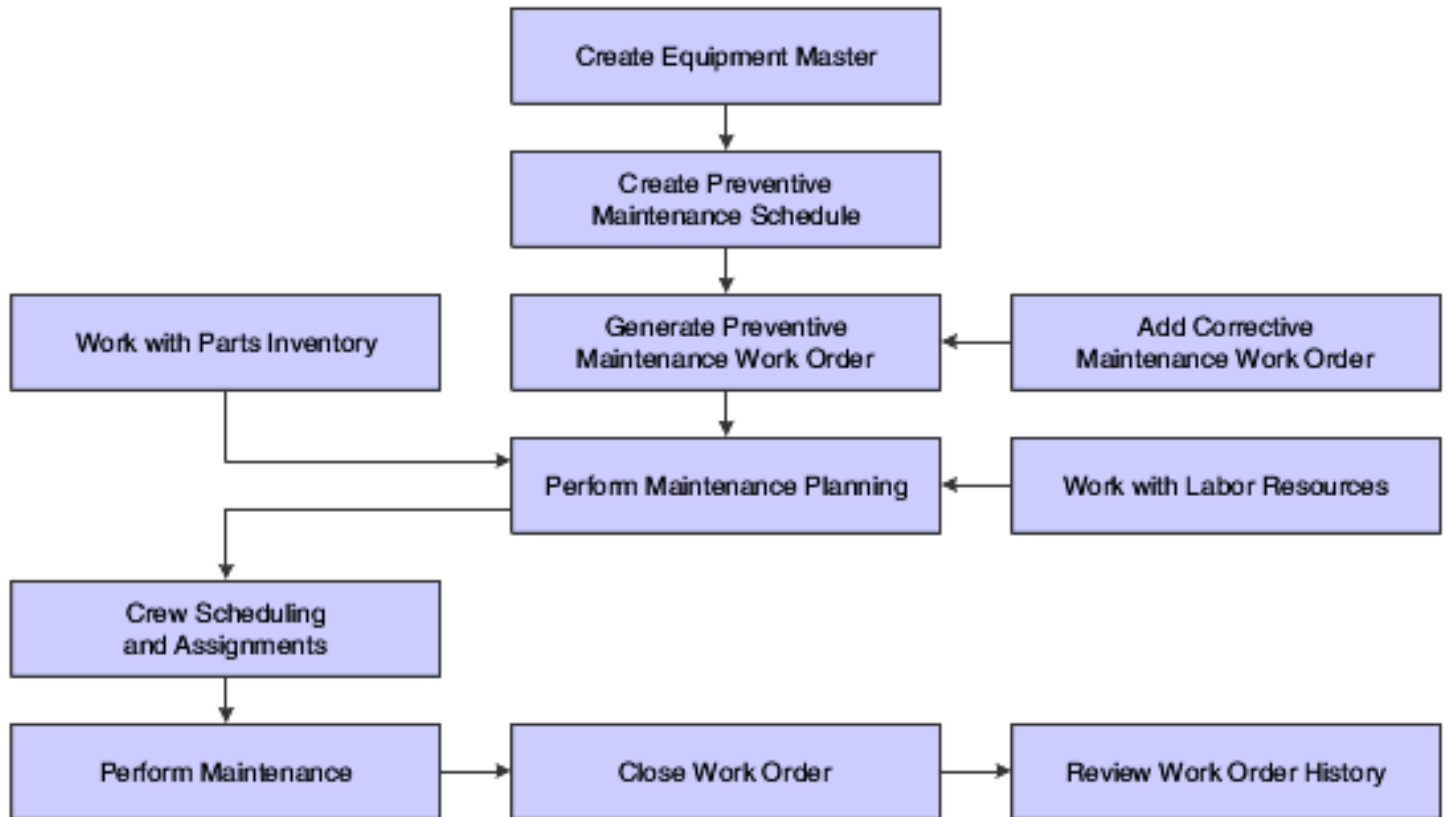
JD Edwards EnterpriseOne Capital Asset Management Integrations

The JD Edwards EnterpriseOne CAM system integrates with these JD Edwards EnterpriseOne systems:

- JD Edwards EnterpriseOne Foundation - Address Book.
- JD Edwards EnterpriseOne General Ledger.
- JD Edwards EnterpriseOne Job Cost.
- JD Edwards EnterpriseOne Accounts Payable.
- JD Edwards EnterpriseOne Payroll.
- JD Edwards EnterpriseOne Fixed Assets.
- JD Edwards EnterpriseOne Foundation - Work Order.
- JD Edwards EnterpriseOne Inventory Management.
- JD Edwards EnterpriseOne Procurement.
- JD Edwards EnterpriseOne Product Data Management.
- JD Edwards EnterpriseOne Shop Floor Management.
- JD Edwards EnterpriseOne Requirements Planning.
- JD Edwards EnterpriseOne Resource Assignments.

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- JD Edwards EnterpriseOne Customer Relationship Management.

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

Because JD Edwards EnterpriseOne systems are integrated, you need to enter the vital information about a piece of equipment only one time. When you create equipment masters and supplemental information for a piece of equipment, the system stores the information in the Asset Master table (F1201) and the Equipment Master Extension table (F1217). Many JD Edwards EnterpriseOne systems that you use can then access the information.

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

JD Edwards EnterpriseOne Foundation - Address Book

Every JD Edwards EnterpriseOne system from Oracle works with JD Edwards EnterpriseOne Foundation - Address Book from Oracle to retrieve up-to-date employee, supplier, and other applicable name and address information.

JD Edwards EnterpriseOne General Ledger

When you enter equipment transactions (including billing transactions), you must process them through the general ledger.

You enter all statistical values, such as miles, gallons, and hours into the general ledger.

When you charge a job for equipment use, the system searches the Account Master for the appropriate rate and account to bill.

JD Edwards EnterpriseOne Job Cost

You can manage projects and jobs, and monitor the costs and revenues that are associated with them.

JD Edwards EnterpriseOne Accounts Payable

You can enter equipment charges. When you process equipment parts orders through the JD Edwards EnterpriseOne Procurement system, the system automatically enters the equipment number from the purchase order to the accounts payable voucher.

JD Edwards EnterpriseOne Payroll

You can:

- Enter equipment time for billing purposes.

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- Charge for labor that is associated with operating or repairing equipment.

- Charge to a work order or a work order labor routing step depending on level of detail required by using a specific labor routing step.

JD Edwards EnterpriseOne Fixed Assets

JD Edwards EnterpriseOne Fixed Assets system shares many tables with JD Edwards EnterpriseOne Plant and Equipment Management, such as:

- Asset Master table (F1201) - Stores equipment master information

- Asset Account Balances File table (F1202) - Stores equipment account balance information

JD Edwards EnterpriseOne Plant and Equipment Management also uses automatic accounting instructions (AAIs) from JD Edwards EnterpriseOne Fixed Assets.

JD Edwards EnterpriseOne Foundation - Work Order Processing

You can track, schedule, and report on preventive and corrective equipment maintenance activities.

You can attach parts lists and labor detail steps to the work order to assist in planning the work requirements.

JD Edwards EnterpriseOne Inventory Management

You can:

- Track and take inventory of repair parts.

- Attach parts lists to work orders.

JD Edwards EnterpriseOne Procurement

You can create purchase orders directly from the work order parts list and from other maintenance planning functions within JD Edwards EnterpriseOne Plant and Equipment Management.

A purchase order includes the equipment number, which the system automatically enters in related forms and tables, such as:

- Accounts payable entry

- General ledger

- Equipment ledger

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JD Edwards EnterpriseOne Product Data Management

You can create bills of materials, work centers, and routings. You can also access information about bills of material, work centers, routing instructions, and work center costs.

JD Edwards EnterpriseOne Shop Floor Management

You can use the bills of material and routing instructions to plan and schedule work, and to commit and track usage of labor and materials within the plant. JD Edwards EnterpriseOne CAM and JD Edwards EnterpriseOne Shop Floor Management share the same tables and the majority of the business logic.

JD Edwards EnterpriseOne Requirements Planning

You can plan labor and the material needed for parts, for both forecasted work orders and for actual work orders. The system enables you to manage the supply and demand of inventory parts to ensure that the necessary stock is available to fulfill work orders.

JD Edwards EnterpriseOne Resource Assignments

You can assign a crew or individual resources to a work order or to specific labor detail steps while checking the current availability and assignments of the resources. Resource requirements planning supports time dependant material and capacity plans based on forecasted and actual work order requirements.

JD Edwards EnterpriseOne Customer Relationship Management

Within the support applications of JD Edwards EnterpriseOne Customer Relationship Management (CRM), you can use the JD Edwards EnterpriseOne Case Management module to record and track customer issues, such as equipment failures, and convert them to work orders for repair.

JD Edwards EnterpriseOne Capital Asset Management Implementation

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

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

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

See *JD Edwards EnterpriseOne Tools Software Updates Guide* .

Global Implementation Steps

The suggested global implementation steps for JD Edwards EnterpriseOne CAM are:

1. Set up global user-defined codes (UDCs).
    See *JD Edwards EnterpriseOne Tools Foundation Guide*
2. Set up companies, fiscal date patterns, and business units.
    See *"Setting Up Organizations" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .
3. Set up next numbers.
    See *JD Edwards EnterpriseOne Tools Foundation Guide*
4. Set up accounts, and the chart of accounts.
    See *"Setting Up Bank Accounts" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .
    See also *"Creating the Chart of Accounts" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .
5. Set up the General Accounting constants.
    See *"Setting Up the General Accounting System" in   JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* .
6. Set up multicurrency processing, including currency codes and exchange rates.
    See *"Setting Up General Accounting for Multicurrency Processing" in the   JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide* .
    See also *"Setting Up Exchange Rates" in the   JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide* .
7. Set up ledger type rules.
    See *"Setting Up Ledger Type Rules for General Accounting" in the   JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* .
8. Enter address book records.
    See *"Entering Address Book Records" in the   JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .
9. Set up inventory information such as branch/plant constants, default locations and printers, manufacturing and distribution AAIs, and document types.
    See *"Setting Up the Inventory Management System" in the   JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .
10. Set up shop floor calendars.
    See *"Setting Up Shop Floor Management" in the   JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* .

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11. Set up manufacturing constants.

    See *"Setting Up Manufacturing Constants" in the   JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*   .

Capital Asset Management Implementation Steps

The suggested application-specific implementation steps for JD Edwards EnterpriseOne CAM are:

1. Set up constants for work orders.

    See *Setting Up Constants for Work Orders*.
2. Set up Service and Warranty Management (SWM) constants.

    See *Setting Up Constants*.
3. Set up UDCs for CAM.

    See *Understanding UDCs for CAM*.
4. Set up UDCs for resource planning.

    See *Understanding UDCs for Resource Planning*.
5. Set up UDCs for parts planning.

    See *Setting Up UDCs for Parts Planning*.
6. Set up default locations and printers.

    See *Setting Up Default Locations and Printers*.
7. Set up equipment billing information.

    See *Setting Up Equipment Billing*.
8. Set up failure analysis information.

    See *Working with Failure Analysis*.
9. Set up general planning information.

    See *Understanding General Planning Information*.
10. Set up inventory in the Item Master.

    See *Setting Up Inventory in the Item Master*.
11. Set up inventory management and procurement.

    See *Setting Up Inventory Management and Procurement for CAM Users*.
12. Set up next numbers for equipment and work orders.

    See *Setting Up Next Numbers for Equipment Setting Up Next Numbers for Work Orders*.
13. Set up product model and family combinations.

    See *Setting Up Product Family and Model Combinations*.
14. Set up record type formats.

    See *Understanding Record Types*.
15. Set up resource planning.

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See *Setting Up Resource Planning*.

16. Set up specification data for equipment.

    See *Setting Up Specification Data for Equipment*.

17. Set up supplemental data for equipment.

    See *Setting Up Supplemental Data for Equipment*.

18. Set up equipment locations.

    See *Processing Location Billings*.

19. Set up supply and demand inclusion rules.

    See *Understanding Supply and Demand Inclusion Rules*.

20. Set up work order default codes.

    See *"Setting Up Default Managers and Supervisors" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

21. Set up work order history.

    See *Setting Up Work Order History*.

22. Set up work orders for unscheduled maintenance.

    See *Setting Up Work Order History*.

23. Set up work order activity rules.

    See *"Setting Up Activity Rules for Work Orders" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

24. Set up standard parts lists and work order instructions.

    See *Setting Up Standard Parts Lists and Work Order Instructions*.

25. Set up preventive maintenance schedules.

    See *Understanding AAIs for PMs* and *Setting Up PM Rules for Schedules*.

26. Set up maintenance rules.

    See *Setting Up Maintenance Rules*.

27. Set up model work orders.

    See *Creating Model Work Orders*.

Business Interface Integration Objects

A business interface is a set of components that implementation teams can use to create an integration between JD Edwards EnterpriseOne and an external system. Business interfaces can include one or more of these business interface components:

- Business Services

- Real-Time Events

- Batch Import and Export Programs

For additional information about business interfaces, and the business objects available for this product area, see these topics in the *JD Edwards EnterpriseOne Applications Business Interface Reference Guide:*

- *Business Interfaces Overview*

- *Meter Reading*

- *Product Data Management*

- *Equipment Locations*

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2 Understanding Capital Asset Management Features

JD Edwards EnterpriseOne Capital Asset Management Features

JD Edwards EnterpriseOne Capital Asset Management consists of these modules, depending on the licensed products you have purchased:

- JD Edwards EnterpriseOne Fixed Assets.

- JD Edwards EnterpriseOne Plant and Equipment Management.

  This includes sub-modules, such as Equipment Information, Equipment Time Billing, Plant and Equipment Maintenance, JD Edwards EnterpriseOne Foundation - Work Order, Failure Analysis, Case Management, Maintenance Planning, and Plant and Equipment Management Setup.

- JD Edwards EnterpriseOne Condition-Based Maintenance.

- JD Edwards EnterpriseOne Equipment Cost Analysis.

- JD Edwards EnterpriseOne Resource Assignments.

The maintenance features of JD Edwards EnterpriseOne CAM are designed to meet equipment maintenance needs in a variety of ways. For example, you can use the system to:

- Enter and search for equipment information.

- Track equipment movement and status, and assign equipment to multiple locations.

- Track the maintenance history of each piece of equipment and target potential problem machines to minimize equipment downtime.

- Coordinate maintenance activities based on preventive and corrective maintenance schedules.

- Coordinate maintenance activities with materials and labor resources.

- Assign resources to work orders.

- Maintain detailed cost accounting records for equipment.

- Produce reports on a wide range of equipment-related topics.

- Record and track cases.

- Maintain a failure analysis database. Associate failures (issues), analyses, and resolutions with cases and work orders.

Equipment Information and Search

This table describes some of the types of information you can use to locate, organize, and track the availability and repair status of equipment:

Information Type	Description
Parent and component relationships	A parent piece of equipment consists of other parts or components. It can also be a component of another piece of equipment. A parent can also be a virtual or logical piece of equipment with component relationships to other logical equipment. For example, a manufacturing line could be a parent, and the associated manufacturing machinery would be components of the manufacturing line. Use parent and component relationships to group components in the system. You can track the history of a piece of equipment's immediate parent or any of its components. The system accommodates up to 25 levels of components. This record is useful if you use complex or interchangeable equipment assemblies.
Equipment numbers	You can identify equipment by: • Equipment number • Unit number • Serial number
Location	You can search for and track equipment, based on its historical, current, or planned location. This tracking ability is helpful if you need to review equipment that is used at a particular job site or reroute equipment between job sites.
Category codes	You can define up to 33 category codes to classify equipment for reporting and data selection purposes. For example, you can perform online searches for equipment based on category codes that represent major accounting class, major equipment class, manufacturer, model year, and so on.
Other user-defined codes (UDCs)	You can assign three additional UDCs: • Finance methods • Equipment status codes • Equipment message types For example, you can set up equipment status codes to apply to each piece of equipment, such as: • Down • Standby • Working • Available
Licenses and certifications	You can record and track license and permit information for each piece of equipment. This record is helpful if you dispatch equipment to job sites that are located in different licensing authorities.
Online message logs	You can use online message logs to enter messages about a piece of equipment. Standard message types include: • Planned maintenance • Actual maintenance • Problem reports You can also enter additional remarks about any piece of equipment.

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Equipment Location Tracking

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

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

Reporting

JD Edwards EnterpriseOne CAM provides you with a wide variety of reports that offer you a comprehensive view of the equipment needs and processes. You can configure any report to fit the company's reporting needs and simplify the fulfillment of various governmental reporting requirements. These examples are a partial listing of the predefined reports available:

- Work Order Cost Summary
- Work Order Cost Detail
- Maintenance Schedule
- Equipment Parts List
- Specification Data
- Location Tracking
- Equipment Variance

In addition to standard reports, you can create custom reports using virtually any data within the system.

JD Edwards EnterpriseOne Case Management

JD Edwards EnterpriseOne Case Management enables an organization to create a central point-of-contact for all customer service processes. You can capture and manage cases, as well as create work orders to fulfill cases. On the case entry or work order entry screens, you can use menu exits to quickly retrieve information about the customer, product, or issue.

See *"Setting Up Case Management Fundamentals" in the JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

JD Edwards EnterpriseOne Condition-Based Maintenance

In contrast with frequency-based preventive maintenance, JD Edwards EnterpriseOne Condition-Based Maintenance (CBM) looks at upper and lower limits, tolerances, and other conditions that might cause an equipment or system warning or alarm. Once the alarm has been initiated, the alert can be passed into the CBM module and initiates an email notification, investigation email, updates the preventive maintenance schedule, or creates a work order to resolve the reason for the alert.

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Note:

- *"Introduction to JD Edwards EnterpriseOne Condition-Based Maintenance" in the JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide* .

JD Edwards EnterpriseOne Equipment Cost Analysis

The JD Edwards EnterpriseOne Equipment Cost Analysis (ECA) module provides you with the ability to perform detailed cost analysis on the equipment that you own and maintain. ECA benefits companies that use a variety of equipment and that need to identify current problem areas or track increasing operational costs. For example, you could compare the maintenance costs for a group of related equipment over a number of financial years, or compare the maintenance costs for a type of equipment operating under a number of different operating environments or across different sites.

Note:

- *"Getting Started with JD Edwards EnterpriseOne Equipment Cost Analysis" in the JD Edwards EnterpriseOne Applications Equipment Cost Analysis Implementation Guide* .

JD Edwards EnterpriseOne Resource Assignments

The JD Edwards EnterpriseOne Resource Assignment module supports two primary processes:

- Creating a crew schedule.
- Assigning resources to the schedule.

When creating the crew schedule, the total capacity of the crew by lead craft is used during the crew assignment process. Once the schedule is in place you can then assign individual resources to the crew schedule while checking the current availability and assignment of the resources. The assignment process can also be carried out directly to the work order details when a crew schedule a crew schedule is not being created.

Note:

- *"JD Edwards EnterpriseOne Resource Assignments Overview" in the JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide* .

JD Edwards EnterpriseOne Capital Asset Management Tables

JD Edwards EnterpriseOne CAM uses a variety of tables to store the necessary information to support JD Edwards EnterpriseOne CAM processes.

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Primary Tables and Descriptions

This table lists the primary tables for JD Edwards EnterpriseOne CAM:

Primary Table	Description
Account Ledger (F0911)	Stores general ledger journal entries and provides an audit trail for both the Asset Account Balances File table (F1202) and the Account Balances table (F0902).
Asset Master File (F1201)	Stores basic information about each piece of equipment, such as: • Equipment number • Description • Account coding • Category codes
Asset Account Balances File (F1202)	Stores the account balance amount or unit for each equipment account.
Location Tracking Table (F1204)	Stores location information for a piece of equipment, including: • Equipment number. • Location. • Start effective date. • Ending date. • Equipment status. • Transfer number. • Location code, which indicates the type of location, such as planned, current, or history.
Maintenance Schedule File (F1207)	Stores information about each preventive maintenance schedule, both current and history and includes information, such as: • When the service is to be performed. • When the service was last completed. • Current status. • References to any associated work order.
Equipment Master Extension (F1217)	Stores additional information about each piece of equipment relating to the JD Edwards EnterpriseOne Service Management and CAM modules.
Equipment Master Location History (F1731)	Stores the owner and site history information for each piece of equipment when changed on the equipment master.
Work Order Master File (F4801)	Stores static information about each work order, such as: • Description of work • Estimated amount and hours

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Primary Table	Description
	• Equipment worked on • Charging information

Secondary Tables and Descriptions

This table lists the secondary tables for JD Edwards EnterpriseOne CAM:

Secondary Table	Description
User-Defined Codes (F0005)	Contains all user-defined system values.
Supplemental Database Setup (F00090)	Stores supplemental database information. CAM uses these supplemental databases: • AM - Asset Management • WO - Work Orders
Supplemental Database Data Types (F00091)	Stores data types for supplemental databases.
Supplemental Data (F00092)	Stores supplemental data in either columnar or narrative format about equipment or work order.
Automatic Accounting Instructions Master (F0012)	Contains information used to define the interfaces between CAM and the JD Edwards EnterpriseOne General Ledger chart of accounts.
Address Book Master (F0101)	Contains tax assessor and equipment user address information.
Account Master (F0901)	Maintains general ledger account data.
Default Accounting Constants (F12002)	Maintains default account information by company and asset cost account.
Default Depreciation Constants (F12003)	Maintains default information by company and asset cost account of all depreciation books and values.
Equipment Messages (F1205)	Stores user-generated messages regarding equipment maintenance.
Equipment License Master (F1206)	Stores license and permit information for equipment.
Equipment PM Schedule (Model) (F12071)	Stores model maintenance schedules.
Location History Text (F1210)	Contains text for location history records.
Parent History (F1212)	Contains the history of parents for a component.

Secondary Table	Description
Specification Cross Reference (F1215)	Stores, by equipment class, the values of each field in the Specification Data table (F1216).
Specification Data (F1216)	Stores static equipment information, such as power requirements, size, capacity, and other nameplate information.
Equipment Parts List (F13017)	Contains the spare parts information for the equipment. Both catalogued and non-catalogued items can be stored.
Meter Reading Estimates (F1306)	Maintains the estimated meter readings that the system uses to schedule maintenance activities.
Status History File (F1307)	Maintains a history of status changes to equipment and work orders.
Equipment Routes Table (F1308)	Stores equipment maintenance loop information by associated equipment and service type.
PM Projections (F13411)	Maintains information about projected Preventive Maintenance (PM) by service type for each piece of equipment.
Equipment Analysis Groups (F1380)	Contains the group or subgroup definitions.
Equipment Analysis Filters (F1381)	Contains the filters associated with the group or subgroup.
Equipment Analysis Listing (F1382)	Contains the current list of equipment associated with the group and subgroup based on the filters.
Equipment Analysis Costs (F1383)	Contains the summary and detailed cost information for the group, subgroup, and equipment.
Equipment Analysis Rules (F1385)	Contains the rules that control what accounts are included in the costs analysis and their cost classification.
Equipment Category Code Mapping (F1391)	Maintains the rules by which the system automatically assigns equipment and business unit category codes when you create master records for new equipment or create work orders for equipment.
Maintenance Rules (F1393)	Defines when preventive maintenance are scheduled and provides default values to work orders.
Bill of Material Master File (F3002)	Stores information about the parts that are needed to perform a specific type of maintenance.
Routing Master File (F3003)	Stores detailed instructions by labor step for a specific type of maintenance.
Work Order Parts List (F3111)	Maintains information about parts that are related to specific work orders.
Work Order Routing (F3112)	Maintains information about the labor steps that are related to specific work orders.
Forecast File (F3460)	Stores the forecast data that the Material Requirements Planning (MRP) program uses for calculation.

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Secondary Table	Description
Work Order Record Types File (F48002)	Stores types of text that are associated with work orders.
Work Order Instructions File (F4802)	Stores description text and the various record types that are defined in the UDCs, such as Description of Request and Final Disposition.
W.O. Status Action Table (F4826)	Maintains information about the order of allowed statuses through which a work order must pass.
Work Order Approval Routing (F4827)	Maintains reject statuses for work orders according to work order type.
Resource Assignment Constants (F48301)	Contains constants and system wide default information by business unit.
Maintenance Schedule Periods (F48302)	Contains the date from and thru schedule period details.
Resource Working Hours (F48307)	Contains the working hour rules for the base and resource working hours.
Resource Master (F48310)	Contains the master record for crews, individual and equipment resources.
Resource Assignments (F48311)	Contains the detail assignment record for the crew schedule or individual and equipment assignment for the work order or labor detail step.
Maintenance Schedule Metrics (F48315)	Contains the availability and schedule compliance metric information for the crew and lead craft by schedule period.
Maintenance Reschedule Metrics (F48316)	Contains the rescheduling metric information indicate the reasons why work was rescheduled by crew, craft, and work order.

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3 Setting Up Capital Asset Management

Understanding System Setup

Before you can use any of the maintenance features in JD Edwards EnterpriseOne CAM, you must define certain information to configure the system for specific business needs.

> **Note:**
>
> - *"Setting Up the Fixed Assets System" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide .*

Equipment Information

You set up equipment information to establish system basics, such as:

- Equipment and Fixed Asset constants.
- Service and Warranty Management (SWM) constants.
- Next numbers.
- Automatic accounting instructions (AAIs) that define the link between JD Edwards EnterpriseOne CAM and the JD Edwards EnterpriseOne General Ledger.

Supplemental Data

You set up supplemental data to define the types of detailed information that you want to track for equipment and work orders. Supplemental data is entirely user-defined; you determine the data that you want to track based on the business needs.

PM Information

You set up PM information to:

- Define standard maintenance procedures.
- Define rules that govern when maintenance is performed.

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Work Order Information

You set up work order information to provide the system with the information that is needed to process work orders according to the business needs. For example, you must:

- Identify the managers and supervisors who are responsible for maintenance tasks.

- Determine the steps through which a work order must pass.

  See *Setting Up Work Orders*.

Maintenance Planning Information

You set up maintenance planning information to:

- Determine basic planning constants for each branch, such as the type of inventory commitment.

- Define the rules by which the system indicates a need for parts and labor resources.

  See *Setting Up Parts and Labor Planning*.

  > **Note:**
  > - *"Using Asset Depreciation" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
  > - *"Mapping Category Codes" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

Understanding UDCs for CAM

This section discusses:

- JD Edwards EnterpriseOne CAM UDCs.

- Work order UDCs.

- Failure analysis UDCs.

- Meter reading interoperability UDCs.

> **Note:**
> - *"Understanding System Setup" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

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CAM UDCs

You can configure many of the fields in JD Edwards EnterpriseOne CAM by setting up UDCs to meet the needs of the business environment. You identify UDCs by the system code and the user-defined code list—for example, 13/MT represents system 13 (CAM) and user-defined code list MT (Meter Type).

Preventive Maintenance Status Codes (12/MS)

Use these codes to identify the status of a maintenance task at a specific time. For example, you might set up one code to indicate that a maintenance task is waiting for parts and another code to indicate that the work is in progress.

JD Edwards EnterpriseOne Plant and Equipment Management includes these predefined status code values, which have special meaning to the system:

- **01:** Maintenance schedule defined.
- **98:** Maintenance canceled.
- **99:** Maintenance complete.

You can create any other status codes that you need. However, it is best to keep within the 01 to 99 range, as some programs rely on status values within this range for selections.

Preventive Maintenance Category Codes 01 (13/P1, 13/P2)

Use these codes to categorize preventive maintenance schedules. For example, set up codes to divide preventive maintenance schedules into groups, such as critical and noncritical.

Equipment Message Type (12/EM)

Use these codes to define and group different types of messages, such as planned maintenance, problem reporting, lease terms, and so on.

Preventive Maintenance Service Type Codes (12/ST)

Use these codes to identify the different types of maintenance tasks that you assign to the preventive maintenance schedules for each piece of equipment, such as LUBE for equipment lubrication, INSPECT for safety inspection, and so on.

Work Order UDCs

For JD Edwards EnterpriseOne CAM, you can set up these UDCs from Foundation - Work Order:

- Work Order Document Types (00/DT).
- Work Order Databases (00/WD).
- Type Codes (00/TY).
- Work Order Priority Codes (00/PR).
- Work Order Status Codes (00/SS).
- Work Order Category Code 01 (00/W1).
- Additional Work Order Category Codes (00/W2 through 00/W0).
- Work Order Detail Specifications Codes (00/RT).

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You can access these UDCs from the Work Order User-Defined Codes menu (G17421):

- Service Group (17/SG).

- Time Entry Hour Type (17/WT).

Work Order Document Types (00/DT)

Use these codes to differentiate between different types of work order transactions in the general ledger. For example, you can create document types for preventive maintenance work orders, corrective maintenance work orders, and so on.

Work order document type is a key work order code. You define this code in the Document Type Maintenance program (P40040) to indicate that the work order is an equipment work order type.

Summary Document Types (48/DC)

Use these codes to define the document types that the system displays on Cost by Work Order. For example, you can set up codes for these document types:

- Inventory issues

- Work order inventory issues

- Accounts payable entries

- Time entries

Inventory Document Type (48/ID)

Use these codes to define the inventory document types for the work order that the system displays on the Estimate to Actual Variance form when the Update W.O. Actual Amounts program (R13800) is run. For example, you can set up codes for these types of issues:

- Inventory issues

- Work order inventory issues

Bill Type (40/TB)

Use these codes to define the types of parts lists that you can assign to a work order, such as preventive maintenance parts lists, corrective maintenance parts lists, and so on.

Routing Type (40/TR)

Use these codes to define the types of labor routing instructions that you can assign to a work order, such as preventive maintenance instructions, corrective maintenance instructions, and so on.

> **Note:**
>
> - *"Setting Up the Work Order System" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

Failure Analysis UDCs

You can access the 48/K1 through 48/K5 (Failure Analysis Codes CC 1 through 5). UDCs from the Failure Analysis User-Defined Codes menu (G17451).

Meter Reading Interoperability UDCs

You can access these UDCs from the Meter Reading Interoperability menu (G1332):

- 00/TT (Transaction Type)
- 13/MT (Meter Type)

    Meter Type Special Handling Codes **1, 2,** and **3** are hard-coded, but you can change the code descriptions.

Setting Up Constants

This section provides an overview of constants and discusses how to set up service and warranty constants.

Understanding Constants

To define default information for the entire system, you set up system constants. Constants control the types of information that you track and the rules that the system uses to perform certain calculations. You can also define whether the system uses the asset, unit, or serial number as the default primary number that appears for the equipment. The information that you enter for the primary number overrides the primary number information that is stored in the company constants.

Forms Used to Set Up Constants

Form Name	FormID	Navigation	Usage
Fixed Asset Constants	W001012B	Plant and Equipment Management Setup (G1341), Equipment Constants	Set up Equipment Management constants. These constants are also used for fixed assets. See *"Setting Up the Fixed Assets System" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

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Form Name	FormID	Navigation	Usage
S/WM System Constants Revisions	W17001C	Plant and Equipment Management Setup (G1341), Service & Warranty Constants Service & Warranty Setup (G1740), Service & Warranty Constants	Set up service and warranty constants.

Setting Up Service and Warranty Constants

Access the S/WM System Constants Revisions form.

Select the General tab.

General

Select the General tab.

Customer Number for Base Warranties
Enter a user-defined name or number that identifies an address book record.

You can use this number to locate and enter information about the address book record.

Blank: The system creates base warranties by using the Sold To address book number on the sales order or the Owner address book number on the equipment record as the customer number.

Parent/Child Structure Type
Specify the type of organizational structure to use in the address book when searching for parent/child contracts.

Day Type Code for Holidays
Enter a code to indicate the type of day. Values are:

W: Work Day

E: Weekend

H: Holiday

Complete this field to specify the code that is used in the Work Day Calendar to indicate holidays.

The system uses this information during the entitlement checking process.

S/WM Installed (service warranty management installed)
Specify whether the system interfaces to the Service Management system.

Validate Product Family/Model Combination
Specify whether you want yes or no responses on prompt screens.

If this option is selected, the system validates product family and model combinations.

When you select this option, the system enables users to enter only the combinations that have been set up in the F1790 table.

Check for Previous Cases and Work Orders on Customers

Specify whether the system locates any previous cases and work orders for the current customer number when you enter cases or work orders.

Check for Previous Cases and Work Orders on Piece of Equipment

Specify whether the system locates any previous cases and work orders for the current equipment number, inventory item number, or product model when you enter cases or work orders.

Use Failure Analysis Tree for Selecting Failure Analysis Codes

Select a code that the system uses to determine whether to use the Failure Analysis Tree to select failure analysis codes.

Complete this field to require users to select failure analysis codes from the failure tree.

If you do not enable this option, the system enables you to select failures, analyses, and resolutions from the Failure Analysis Codes Search & Select program (P17761S).

Use Workflow for Approving Failure Analysis for Re-Use

Select a code that you can use to specify whether to use workflow to approve failure analysis for re-use.

Customer, Site

Enter a code that specifies which address book number to use to perform entitlement checking when you enter work orders and cases.

The values are hard-coded in the user-defined code table (17/YN) (Values) and cannot be changed. Values are:

0: Customer Number

1: Site Number

Case

Select the Case tab.

See *"Setting Up Case Management Constants" in the JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

Work Orders

Select the Work Orders tab.

Provider Group Search Type

Enter a value from UDC 01/ST (Search Type) that identifies the kind of Address Book record that the system selects when you search for a name or message, such as suppliers, customers, or employees.

Responsible BU Location (responsible business unit location)

Enter a code that specifies from which tables the system retrieves the responsible business unit (that is, the business unit to which work orders are billed).

When adding a work order, the default value for the business unit is based on the constant value. For example, if the default value of the business unit is based on the equipment number, the system retrieves the value for the responsible business unit from the F1217 table.

The default value is 1. Values are:

1: F4117 and F41171 tables

2: F1790 table

3: F1217 table

4: F0101 table

5: F1793 table

6: F1797 table

Mail Box for Escalation

Enter a value from UDC 02/MB (Electronic Mail Boxes) that specifies the provider group mailbox that the system uses to deliver the message.

Service Order Entitlement Trigger

Enter a value from UDC 17/ET (Entitlement Check Trigger) that specifies which field should initiate entitlement checking when you enter a work order.

Who's Who Required

Specify whether the work order customer must have Who's Who records.

If this option is enabled, you cannot add the work order unless the work order customer and all additional contacts reside in the F0111 table.

You must select a customer number from the window. The system returns the short identifier that is associated with the Who's Who record.

Use Base Price

Specify whether the system uses the base price when pricing a work order from advanced pricing.

If you enable this option, the system uses the base price.

Use Solution Advisor for Equipment Work Orders

Specify whether the system uses JD Edwards EnterpriseOne Solution Advisor to search for and maintain solutions for issues on equipment work orders. If you do not enable this option, the system uses Failure Analysis. This option only applies to the CAM - Manage Equipment Work Orders program (P13714).

P17714 does not reference this constant.

Use Solution Advisor for Service Work Orders

Specify whether the system uses JD Edwards EnterpriseOne Solution Advisor to search for and maintain solutions to problems for service work orders. If you do not enable this option, the system uses Failure Analysis.

This option applies only to the Service Management Workbench program (P90CD020). P17714 does not reference this constant.

Contracts

Select the Contracts tab.

Responsible BU Location (responsible business unit location)

Enter a code that specifies from which tables the system retrieves the responsible business unit to which contracts should be billed. Values are:

1: F4117 table and F41171 table (default).

2: F1790 table.

3: F1217 table.

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4: F0101 table.

5: F1793 table.

If the business unit in the AAIs is left blank, contract billing and amortization use this value to locate the responsible business unit to which revenue will be booked.

Recognize Credit When Entered
Select this option to move the credit amount to recognized revenue. If you disable this option, the credit amount is recognized over the life of the contract.

Use Base Price
Select this option for this form to specify whether the system uses the base price for pricing a contract.

Use Contract BU if Responsible BU is Blank (use contract business unit if responsible business unit is blank)
Select this option for this form to specify where the system retrieves the responsible business unit.

If the responsible business unit is blank in the location indicated by the Responsible BU Location constant, and if you enable this option, the system uses the responsible business unit from the contract. Otherwise, the system uses the responsible business unit from the location in the constant. If the responsible business unit is not set up for the location indicated by the constant, the system displays an error message.

Equipment Master

Select the Equipment Master tab.

Push Site Change To Contract
Select this option to update the site number on all contracts that are related to equipment record installation site changes.

If site number has changed, that change is applied to all contracts for the item.

Push Installation Date Change to Base Warranty Contract
Select this option to update the start and end dates on base warranty contracts that are only related to equipment record installation date changes.

Date changes do not apply to billable contracts.

Push Inventory Number Change to Contracts
Select this option to update the inventory number on all contracts that are related to equipment record installation inventory number changes.

Push Customer Change to Base Warranty Contract
Select this option to update base warranty contracts with customer changes.

Create One-to-One
Select this option to create equipment records for non-serialized items when you run the Equipment Master Update program (R17024).

When you select this option, the system creates a serialized number in UDC 40/SN (Serial Number status code) for each unit of one in the F4220 table and creates an equipment record for the single item.

This option works with the Serial Number Required Flag in the Item Branch/Plant program. For non-serialized items that you want to track in Service Management, the Serial Number Required field on the Item Branch/Plant Info. form must be set to **6** so that you can create equipment records for non-serialized items.

Create Many-to-One

Select this option to create equipment records for non-serialized items when you run the Equipment Master Update program (R17024).

When you select this option, the system creates a single equipment record for the item, regardless of the quantity.

This option works with the Serial Number Required Flag in the Item Branch/Plant program. For non-serialized items that you want to track in Service Management, the Serial Number Required field on the Item Branch/Plant Info. form must be set to **6** so that you can create equipment records for non-serialized items.

Warranty Claims

Select the Warranty Claims tab.

Use Base Price

Specify whether the system uses the base price when pricing a warranty claim from advanced pricing. If you enable this option, the system uses the base price.

Supplier Recovery Claims

Select the Supplier Recovery Claims tab.

Use Base Price

Specify whether the system uses the base price when pricing a supplier recovery claim from advanced pricing. If you enable this option, the system uses the base price.

Setting Up Next Numbers for Equipment

This section provides an overview of next numbers for equipment and discusses how to set up equipment next numbers.

> **Note:**
>
> - *"Understanding System Setup" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

Understanding Next Numbers for Equipment

The Next Number program controls the automatic numbering in many JD Edwards EnterpriseOne systems. When you set up equipment next numbers, you enable the system to automatically assign unique numbers for certain items. For example, when you create an equipment master record for a new piece of equipment, the system assigns a unique equipment number to the equipment.

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Form Used to Set Up Next Numbers for Equipment

Form Name	FormID	Navigation	Usage
Set Up Next Numbers by System	W0002C	Plant and Equipment Management Setup (G1341), Next Numbers Select the record for system 12 and click Select.	Set up equipment next numbers.

Setting Up Equipment Next Numbers

Access the Set Up Next Numbers by System form.

On the Set Up Next Numbers by System form, complete the Next Number and Check Digit Used fields for each number that you need to set up.

Do not delete next number values. Deleting a next number value might prevent the system from assigning an automatic next number or cause other unpredictable results.

Setting Up Product Family and Model Combinations

This section provides an overview of product family and model combinations and discusses how to add product family and model combinations.

Understanding Product Family and Model Combinations

Product family and model combinations are UDCs that enable you to categorize and manage the assets, as well as to track failures through a link to Failure Analysis.

You can set up product family and model combinations to assign each product model to the appropriate product family. A product family is a larger group that can contain many models. A model is a more specific group that can belong only to one product family.

For JD Edwards EnterpriseOne CAM, an example of product family and model combinations might be a forklift product family, with models of gas engine and electric engine. For JD Edwards EnterpriseOne Service Management, an example might be a printer product family, with models of laser and inkjet.

Form Used to Set Up Product Family and Model Combinations

Form Name	FormID	Navigation	Usage
Product Family/Model Revisions	W1790C	For Capital Asset Management: Plant & Equipment Management Setup (G1341), Product Family/ Model Revisions For Service Management: Service & Warranty Setup (G1740), Product Family/Model Revisions Click Add on the Work with Product Family/ Model Revisions form.	Add product family and model combinations.

Adding Product Family and Model Combinations

Access the Product Family/Model Revisions form.

Responsible BU for Service (responsible business unit for service)
Complete this field to define the default responsible business unit for this product family and model combination.

The system uses the value from this field only if you have set up the SWM constants to use the responsible business unit by product family and model.

Setting Up Customer and Service Provider Records

This section provides an overview of customer and service provider records and discusses how to:

- Set up customer records.
- Add SWM information to customer records.
- Set up service provider records.
- Add SWM information to service provider records.

Understanding Customer and Service Provider Records

You can use JD Edwards EnterpriseOne Address Book to create a database of information about customers and service providers, including their addresses and phone numbers. The system creates the F1797 table, which is an extension of the F0101 table and which stores the additional S/WM address book information.

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For JD Edwards EnterpriseOne CAM, you must define S/WM information in business units and in the address book records of employees who create or revise work orders. The equipment record uses the business unit to represent the primary site and owner of the asset.

You must create an address book record for a customer before you can create contracts, enter cases, or enter work orders for them.

Service providers enter cases and fulfill the work orders. By maintaining records on service providers, you can also track customer satisfaction regarding each service provider. For example, a service provider can be a consultant on a case, a technician on a work order, or an authorized dealer. Set up service providers in the address book.

> **Note:** For JD Edwards EnterpriseOne CAM, to ensure that the Work Order Revisions program (P17714) functions properly, you must set up all users of work order programs to be service providers. The only required field on the Service Provider Revisions form is Time Zone. The remaining fields apply to JD Edwards EnterpriseOne Service Management.

Forms Used to Set Up Customer and Service Provider Records

Form Name	FormID	Navigation	Usage
Address Book Revision	W01012A	For Capital Asset Management: Plant & Equipment Management Setup (G1341), Address Book Revisions For Service Management: Service & Warranty Setup (G1740), Address Book Revisions Click Add on the Work With Addresses form.	Create address book records for customers and service providers.
Customer Master Revision	W03013B	Select A/R from the Form menu on the Address Book Revision form.	Set up customer records.
Customer Information Revisions	W1782B	Select S/WM from the Form menu on the Address Book Revision form. Click Add on the Work With Service/ Warranty Management Information form. Click Customer on the Service/ Warranty Management Information form	Add SWM information to customer records. If you need to delete a customer or service provider, click Delete on the Work With Service/ Warranty Management Information form. The system deletes the SWM information only from the F1797 table; it does not modify the F0101 table.

Form Name	FormID	Navigation	Usage
Service Provider Revisions	W1782C	Select S/WM from the Form menu on the Address Book Revision form. Click Add on the Work With Service/Warranty Management Information form. Click Service Provider on the Service/Warranty Management Information form.	Add SWM information to service provider records.

Setting Up Customer Records

Access the Address Book Revision form.

Select the Additional 1 tab.

Address Book Revision　　　　　　　　　　　　　Layout: (No Layout) ▼　?

✓　✕　🖳 Form　⚙ Tools

Address Number　　　　[▪　　　　　]

| Address Book | Mailing | **Additional 1** | Additional 2 | Related Address | Cat Code 1 - 10 | Cat Code 11 - 20 | Cat Code 21 - 30 |

Payables Y/N/M	N	*Not a supplier*	☐ Receivables Y/N
Employee Group Approvals	[　　　]	.	☐ User Code
AR/AP Netting	N	*No*	☐ Subledger Inactive Code
Add'l Ind Tax ID	[　　　　　]		☐ Employee Y/N
Tax Exempt Certificate	[　　　　　]		☐ HRM Records Exist
Person/Corporation Code	[　]		
Credit Message	[　]	.	
Language	[　]		
Industry Classification	[　　]	.	

Adding SWM Information to Customer Records

Access the Customer Information Revisions form.

Contracts

Enter a value from UDC 40/AS (Schedule Name) that identifies a price and adjustment schedule.

A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through the customer billing instructions.

Enter the adjustment schedule that you want the JD Edwards EnterpriseOne Advanced Pricing system to use to price contracts.

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Work Orders
Enter a value from UDC 40/AS (Schedule Name) that identifies a price and adjustment schedule.

Enter the adjustment schedule that you want the JD Edwards EnterpriseOne Advanced Pricing system to use to price parts and labor when billing work orders.

Case
Enter a value from UDC 40/AS (Schedule Name) that identifies a price and adjustment schedule.

When you enter a case, the system copies the schedule attached to the sold-to address into the order. You can override this schedule at the header level.

Enter the adjustment schedule that you want the JD Edwards EnterpriseOne Advanced Pricing system to use to price a case.

Default Service Provider
Enter the address book number of the default service provider.

The system retrieves this information when you enter a work order for this customer if the processing option are set to default Crew/Manager on P13714.

Work Order Service Type
Enter a value from UDC 00/TY (Work Order/ECO Type) that indicates the classification of a work order or engineering change order.

You can use work order type as a selection criterion for work order approvals.

The system retrieves this information when you enter a work order for this customer.

> **Note:** These fields are reserved for future use: Default Dealer, Standard Carrier, and Shipment Tracking.

Setting Up Service Provider Records

Access the Address Book Revision form.

Select the Additional 1 tab.

Payables Y/N/M (payables yes/no/miscellaneous)
Enter a code that identifies the address as a supplier. Values are:

Y: Yes, this is a supplier. A processing option specifies whether the supplier master record appears automatically after you add an address.

N: No, this is not a supplier. This code does not prevent you from entering a voucher for the address.

M: This is a miscellaneous, one-time supplier. This code does not prevent you from entering multiple vouchers for the address.

F: This is a supplier with a foreign address. The IRS requires U.S. companies to identify suppliers with foreign addresses for 1099 reporting.

You should assign tax authorities as suppliers. This enables tax payments to be made to tax authorities.

Code **N** is informational only unless you set a processing option. In this case, a warning message appears if both the Payables and Receivables fields are **N.**

Complete this field to indicate whether the service provider receives payments from the company

Adding SWM Information to Service Provider Records

Access the Service Provider Revisions form.

ACD Extension (automatic call distributor extension)
Enter a number without the prefix or special characters, such as hyphens or periods, that makes up the telephone number for an entity.

You can use any applicable telephone number format for a country. This field is used in conjunction with the Prefix (AR1) field, where you enter the first segment of the telephone number, which is called the area code in the U.S.

When you search for an address using a phone number, you must enter the number exactly as it is set up in the JD Edwards EnterpriseOne Address Book system, including any special characters.

The ACD Extension field is an extension of the phone system for the provider. When a case is assigned to a service provider, the system assigns this extension to the case.

Mail Box Designator
Enter a value that determines the mailbox associated with the queue that should be used on delivery of the message.

When a case is assigned to a service provider, the system places the case into this mailbox in the Message Center.

Blank: The queue that is defined in the mailbox appears as the default value.

Pager/Email Address
Enter text up to 40 characters.

If you enter a pager or email address, the system notifies the service provider by page or email when a case or work order is assigned to that service provider.

Service Group
This field is reserved for future use.

Default Account Number

Select the Default Account Number tab.

Home Business Unit
Enter the number of the business unit in which the employee generally resides.

Object Account
Enter the portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories.

For example, you can divide the Cost Code for labor into regular time, premium time, and burden.

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

> **Note:** The system retrieves the general ledger account number for time entry purposes when you enter time for a case.

Adjustment Schedules

Select the Adjustment Schedules tab.

Claims

Enter a value from UDC 40/AS (Schedule Name) that identifies a price and adjustment schedule.

Enter the adjustment schedule that you want the JD Edwards EnterpriseOne Advanced Pricing system to use to price parts and labor for paying service providers.

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4   Setting Up Equipment

Understanding Equipment Setup

Before you can use certain equipment management features, you must set up information about the equipment that you want to track. For example, you need to define warranty characteristics for each piece of equipment that you want to track in the Equipment Master.

If you own equipment that you lease to customers, you need to perform a variety of setup tasks that are associated with JD Edwards EnterpriseOne Plant and Equipment Maintenance.

For JD Edwards EnterpriseOne Service Management users:

- Set up general JD Edwards EnterpriseOne Service Management information and SWM system constants.

- Whether you sell or lease equipment to a customer, you must set up equipment constants.

- Set up the depreciation default and asset cost account.

  Note: You must have the depreciation default set correctly for a valid asset cost account and a responsible business unit; otherwise, the setup fails.

Understanding Fixed Asset Range of Accounts

Because JD Edwards EnterpriseOne Capital Asset Management (CAM) is closely integrated with JD Edwards EnterpriseOne Financial Management, you can enter and track the equipment costs, review those costs, and print a variety of equipment cost reports. The system identifies costs that are specific to equipment, based on the fixed asset range (FX range) of accounts in the automatic accounting instructions (AAIs). The FX range of accounts includes:

- Maintenance expense accounts

  Maintenance expense accounts track costs that are associated with the upkeep of equipment, such as labor and parts.

- Operating expense accounts

  Operating expense accounts track costs that are associated with operating the equipment, such as fuel, licensing, and certification.

- Equipment revenue accounts

  Equipment revenue accounts track the revenue that is generated by a piece of equipment.

- Statistical accounts

  Statistical accounts track units, such as hours, miles, and gallons, that are associated with the use of a piece of equipment. Although statistical accounts are within the FX range of accounts, they are not used for maintenance costing.

Although most maintenance costs for equipment enter the system through maintenance work orders, you can enter equipment costs through any JD Edwards EnterpriseOne system that creates journal entries for business transactions in the Account Ledger table (F0911), such as:

- JD Edwards EnterpriseOne General Ledger.

- JD Edwards EnterpriseOne Accounts Payable.

- JD Edwards EnterpriseOne Payroll.

- JD Edwards EnterpriseOne Inventory Management.

- JD Edwards EnterpriseOne Procurement and Subcontract Management.

- JD Edwards EnterpriseOne Foundation - Work Order.

Understanding Journal Entries for Equipment Costs

This diagram illustrates the types of journal entries that affect equipment costs and how those entries are assigned to equipment:

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

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After you enter journal entries and post them to the proper accounts, you can review the costs by using a variety of programs and reports.

Setting Up Specification Data for Equipment

This section provides an overview of specification data, lists prerequisites, and discusses how to set up specification data.

Understanding Specification Data

Use specification data to define which types of static data, such as nameplate information, you want to record for a particular equipment class. For each equipment class, you can create up to 99 pages of data with as many as 16 data fields per page. You can set up the sequence in which the data appears and specify the names for the various data fields.

Prerequisites

Before you complete the tasks in this section:

- Verify that you have entered a supplemental category code on the Fixed Asset Constants form.
- Set up a supplemental data type of SP.

Form Used to Set Up Specification Data for Equipment

Form Name	FormID	Navigation	Usage
Specification Cross Reference Revisions	W1215D	Supplemental Data Setup (G1344), Specification Cross Reference Click Add on the Work With Specification Cross Reference form.	Set up specification data. Define which types of static data, such as nameplate information, you want to record for a particular equipment class.

Setting Up Specification Data

Access the Specification Cross Reference Revisions form.

Category Code (variable name)
Enter a value that corresponds to the equipment class for which you are setting up specification data.

This field is located in the upper left corner of the form. The name of this field corresponds to the value that you enter in the Supplemental Category Code field on the Fixed Asset Constants form. In the example, this field is Category Code 15.

Sequence Number

Enter a number that is used to sequence specification data. For any item of specification data, enter the sequence number to specify the order in which you want it to appear on the Specification Data Revisions form.

> **Note:** After you define a specification data item, you cannot change its sequence number. If you need to revise the sequence in which a data item appears, you must type over existing data item information at the desired sequence number.

Field Number

Enter a number that defines which field in the Specification Data table you are setting up.

For this field number, you can define a description, the sequence in which it displays, and any editing rules that you want to apply to the data.

Field Type

Enter a value from user-defined code (UDC) table 12/FT (Field Type) that indicates the type of data to enter in the field on the Specification Data Entry form. Values are:

Blank: The system enters a default value of **A**.

A: Alpha Numeric.

N: Numeric.

D: Date.

T: Time.

Item Size

Enter the field size of the data item.

> **Note:** All amount fields should be entered as 15 bytes, 0 decimals, and the data item type should be **P** (packed).

Product Code

Enter a value from UDC 98/SY (System Code) that identifies a system. Values include:

01: JD Edwards EnterpriseOne Foundation - Address Book

03B: JD Edwards EnterpriseOne Accounts Receivable

04: JD Edwards EnterpriseOne Accounts Payable

09: JD Edwards EnterpriseOne General Ledger

11: JD Edwards EnterpriseOne Multicurrency Processing

User-Defined Codes

Enter a code that identifies the table that contains UDCs.

The table is also referred to as a user-defined code type.

Data Dictionary Item

Enter a code that identifies and defines a unit of information.

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It is an alphanumeric code up to eight characters long that does not allow blanks or special characters such as **%**, **,**, or **+**. You create new data items using system codes 55 through 59. You cannot change the alias.

Use this field to populate these fields on the form based on the data dictionary definition:

- ○ Description
- ○ Item Size
- ○ Justify (R or L)
- ○ Field Type
- ○ Display Decimals

This field is informational only and is not stored in the database.

File ID
Enter a file ID.

Valid files are Work Order Master (F4801), Asset Master (F1201), Address Book Master (F0101), and Item Master (F4101).

Display Decimals
Enter a value that designates the number of decimals in the currency, amount, or quantity fields the system displays.

For example, U.S. dollars (USD) would be **2** decimals, Japanese yen (JPY) would be no decimals, and Cameroon francs would be **3** decimals.

Required Field (Y/N)
Enter a code that specifies whether a value is required. Values are:

Y: This value is required to be valid.

1: This value is required to be valid.

N: This value is not required. This is the default.

0: This value is not required. This is the default.

Page No
Enter a number that specifies on which page the asset number or category code should appear on the specification sheets.

The F1216 table contains only 32 fields per page. If a particular class of equipment requires more than 32 fields to store static data, you must create a new page number.

If the equipment class for which you are setting up specification data requires more than 16 specification data types, complete this field to create a new page.

> **Note:**
>
> To edit specification data against a UDC, complete the Product Code and User-Defined Code fields.
>
> The value that you entered in the Item Size field must match the value of the UDC.
>
> Complete the Data Dictionary Item and File ID fields to edit specification data against information in a specific table, complete these optional fields.

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Setting Up Supplemental Data for Equipment

This section provides an overview of supplemental data, lists a prerequisite, and discusses how to set up cross-references for supplemental data.

Understanding Supplemental Data

Supplemental data consists of categories of information that you define to meet the unique business requirements. For JD Edwards EnterpriseOne Plant and Equipment Management, you can use supplemental data to further define equipment or work orders in the system. After you set up supplemental data, you can use it to report on and track detailed information about equipment or work orders that is not included on the equipment master or work order master. For example, you might want to track supplemental data that is related to equipment maintenance, such as vibration readings and oil readings.

Typical types of supplemental information for equipment might include:

- Capacity

- Transportation notes

- Vibration readings

- Oil readings

- Specification sheets

The demonstration data that comes with JD Edwards EnterpriseOne Plant and Equipment Management includes predefined supplemental databases for JD Edwards EnterpriseOne Asset Management and JD Edwards EnterpriseOne Foundation - Work Order. You can set up additional databases; but you should not alter the demonstration databases, particularly the key fields.

This table displays the name and supplemental database code for each database, as well as the key field for each:

Supplemental Database	Key Field
Asset Management (AM)	The key field for the asset management supplemental database is Asset Number.
Work Order (WO)	The key field for the work order supplemental database is Document Number.

Note: If you use specification sheets, you must set up supplemental data type SP by using the program format.

Cross-References for Supplemental Data

You can search for specification data by equipment category codes, which are defined in the equipment constants.

The Supplemental Data Cross Reference program (P1392) enables you to define which equipment supplemental data the system displays, based on the type of equipment. For example, you might want to display only the oil readings on a forklift. If you do not define the equipment type, the system displays all of the supplemental data types.

The equipment type is based on the equipment category code, which you define in the equipment constants and set up in the Equipment Master.

> **Note:**
>
> - *"Setting Up Supplemental Data" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.

Prerequisite

Before you complete the tasks in this section, define the supplemental category code on Equipment Constants.

See *Setting Up Supplemental Data for Equipment*.

Form Used to Set Up Supplemental Data for Equipment

Form Name	FormID	Navigation	Usage
Supplemental Data Cross Reference Revisions	W1392B	Supplemental Data Setup (G1344), Supplemental Data Cross Reference Click Add on the Work With Supplemental Data Cross Reference form.	Set up cross-references for supplemental data. Define which equipment supplemental data the system displays, based on the type of equipment.

Setting Up Cross-References for Supplemental Data

You must enter a value in the Category Code field from the UDC table that you defined in the equipment constants for supplemental data.

Assign all data types that you want to associate with the type or class of equipment.

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5 Setting Up Equipment Billing

Understanding Equipment Billing

Equipment billing is the billing feature of the JD Edwards EnterpriseOne Plant and Equipment Management system. Use the JD Edwards EnterpriseOne Equipment Billing system to charge equipment costs or credit revenue to various business units, jobs, and cost codes within the organization. To charge a customer outside of the organization for equipment costs, use the JD Edwards EnterpriseOne Service Billing system.

To charge a job or business unit for the use of equipment, you must perform several setup tasks that are unique to equipment billing. For example, if you use location billing to bill for equipment use, you must set up a billing rate code hierarchy for each billing rate code that you define.

Understanding System Integration

When you use JD Edwards EnterpriseOne Equipment Billing, you can link to the other JD Edwards EnterpriseOne systems that the organization uses. For example, you can link to the JD Edwards EnterpriseOne Work Order system to record maintenance charges against work orders as well as to track and monitor schedules by work order. Other systems that you can link to include:

- JD Edwards EnterpriseOne Job Cost.
- JD Edwards EnterpriseOne Inventory Management.
- JD Edwards EnterpriseOne Procurement.
- JD Edwards EnterpriseOne Shop Floor Management.
- JD Edwards EnterpriseOne Accounts Payable.
- JD Edwards EnterpriseOne Accounts Receivable.
- JD Edwards EnterpriseOne Foundation - Work Orders.

This information describes the system integration that exists between the JD Edwards EnterpriseOne Plant and Equipment Management system and other JD Edwards EnterpriseOne systems.

JD Edwards EnterpriseOne Foundation - Address Book

Every JD Edwards EnterpriseOne system works with JD Edwards EnterpriseOne Address Book to retrieve up-to-date address book information about employees, suppliers, and other business entities.

JD Edwards EnterpriseOne General Ledger

When you enter equipment transactions, including billing transactions, you must process them through the general ledger. You enter all statistical values, such as miles, gallons, and so on, into the general ledger. When you charge a job for equipment use, the system searches the Account Master for billing rate default values.

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JD Edwards EnterpriseOne Accounts Payable

You can enter equipment charges through JD Edwards EnterpriseOne Accounts Payable. The system automatically enters the equipment number from the purchase order to the accounts payable voucher.

JD Edwards EnterpriseOne Job Cost

When you charge a job for the use of equipment, the system searches the Job Cost Master for billing rate default values. When you track equipment location, the job defined in Job Cost is often the tracking location.

JD Edwards EnterpriseOne Fixed Assets

JD Edwards EnterpriseOne Equipment Billing uses automatic accounting instructions from JD Edwards EnterpriseOne Fixed Assets, which shares many tables with JD Edwards EnterpriseOne Equipment Billing, including the Equipment Master Record and the Equipment Account Balance records.

Understanding Equipment Billing Setup

Before you can use JD Edwards EnterpriseOne Plant and Equipment Maintenance features, you must set up basic information about the equipment. The system accesses the information that you set up when it runs various programs within JD Edwards EnterpriseOne Plant and Equipment Maintenance.

In addition, before you can use any of the billing features in JD Edwards EnterpriseOne Plant and Equipment Management, you must define information to configure the system for the business needs.

Equipment Constants

Establish system basics, such as:

- The default business units for equipment cost, accumulated depreciation, depreciation expense, and revenue accounts for a piece of equipment.

- The symbols that identify the three types of equipment numbers, including the primary number.

- The equipment category code number that you use to define the equipment class for use in the supplemental database.

User-Defined Codes

Define user-defined codes (UDCs), such as:

- Equipment category codes, including major accounting class and major equipment class.

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- Finance methods.
- Equipment status codes.

Automatic Accounting Instructions

Define Automatic Accounting Instructions (AAIs) information, such as:

- Accounts and general ledger relationships for Equipment Billing interaction with the General Ledger.
- Default debit and credit accounts for Equipment Time Billing.

Next Numbers

Enable the system to automatically assign numbers to items in the system that require unique numbers.

Depreciation Account Rules

Simplify the creation of new equipment masters by establishing values for the Master Information form, such as:

- Major accounting classes
- Major equipment classes
- Depreciation accounts
- Revenue accounts

Category Code Mapping

Assigns default values from business unit category codes to equipment category codes.

Supplemental Data

Stores additional information about equipment. When you set up supplemental data, you can:

- Define the types of supplemental information that you want to keep track of.
- Define specification information.
- Limit user access to supplemental and specification information.

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Equipment Billing Information

Defines various billing codes, and rules, such as:

- Billing rate codes
- Rental rates
- Rental rules
- Account derivation rules

> **Note:**
>
> - *"Understanding Supplemental Data" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .
>
> - *"Setting Up Supplemental Data" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"Setting Up Fixed Asset Constants" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"Automatic Accounting Instructions" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"Next Numbers" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"Setting Up Depreciation Default Values" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"Mapping Category Codes" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide*

Understanding AAIs for Equipment/Plant Maintenance and Equipment Billing

AAIs define the rules by which JD Edwards EnterpriseOne Plant and Equipment Management and JD Edwards EnterpriseOne General Ledger interact. When you define AAIs, you establish how the system processes transactions for various programs. For example, AAIs set the rules by which general ledger transactions can post to Equipment/Plant Management.

You set up AAIs by company, based on account numbers and, in some cases, ranges of account numbers. The system includes predefined ranges. You must specify the business unit and object account for the AAIs as necessary. Additionally, you must specify subsidiary accounts for certain AAIs.

The system uses single AAI values to find individual accounts and AAI ranges to find account ranges. When you set up AAI ranges, you must observe these guidelines:

- You can set up a maximum of 49 account ranges for a single company.
- The maximum number of account ranges that you can set up for all the companies combined is 200.
- Do not skip AAI ranges.

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For example, do not set up FX range 01 through 02 and FX05 through 06, leaving FX03 through 04 blank for later use. If the system searches the AAIs for an account and finds a gap in a range, the search is stopped.

- You must set up the AAI ranges in numerical order.

  However, you are not required to set up the object accounts in numerical order.

These guidelines pertain only to AAIs relevant to JD Edwards EnterpriseOne Plant and Equipment Maintenance and JD Edwards EnterpriseOne Equipment Billing.

Equipment AAIs

Equipment AAIs consist of:

- FX: Identifies accounts that post to equipment.
- FC: Identifies asset cost accounts.
- AT: Identifies accounts and descriptive text that define totals for summary reporting.
- FTD Range: Identifies debit accounts for equipment time entry.
- FTC Range: Identifies credit accounts for equipment time and location billing if you do not use rate components.
- FTC1 - FTC0 Ranges: Identify credit accounts for equipment time and location billing if you use rate components.
- FTxx Ranges: Identify credit accounts for equipment time and location billing that track units by billing rate code.
- FMJE Range: Identifies debit accounts for time entry models.
- FA Range: Identifies accounts for which the system can automatically create any necessary equipment masters when you run a post to equipment.

FTD Range

The system uses the FTD AAI to determine what account to debit when you bill equipment time to a job. You enter the business unit (job) and subsidiary (cost code) on the Time Entry form. If you select to enter an object account on the Time Entry form, it overrides the object account that you set up for this AAI.

When you set up FTD AAIs, you must apply these rules:

- Set up the FTD AAI for company 00000.

  In addition, you can set it up for specific companies.
- Specify the object account number for the FTD AAI.

  The system does not use the business unit and subsidiary.

FTC Range

When you bill equipment time to a job without using rate components, the general ledger post program searches for an appropriate credit account. First, the program searches for the revenue account that you set up in the equipment master. If it does not find the revenue account on the equipment master, the program searches for an FTC account for a specific company. If it does not find one, the program uses the FTC account that you set up for company 00000.

When you set up FTC AAIs, you must apply these rules:

- Set up the FTC AAI for company 00000.

You can also set it up for specific companies.

- Specify complete account numbers for the FTC AAI (that is, the business unit, object, and subsidiary, if used).

FTC1 - FTC0 Ranges

The system charges a percentage of the billing rate to the account that you define for each of these AAIs, based on the amount of the rate component. You use rate components for things such as ownership, operating costs, and maintenance costs.

If you use rate components, the last digit of this AAI identifies the rate component. You can use FTC1–FTC0 to define 10 different rate component accounts. For example, you might use FTC1 to define the object account for component 1 (ownership), FTC2 for component 2 (operating costs), and so on. If the billing rate is 100, and rate component 1 is 75 and rate component 2 is 25, then FTC1 receives 75 and FTC2 receives 25.

Specify the object account for only these AAIs. The system credits the object account when you enter equipment time and create location billings. The system retrieves the business unit from the revenue credit account on the equipment master. If the first character in the business unit field of the FTC1 through FTC0 accounts is an asterisk (*), the system retrieves the business unit from the debit entry.

When you set up FTC1 through FTC0 AAIs, you must apply these rules:

- You must set up these AAIs for company 00000.

  You can also set them up for specific companies.

- You do not use a subsidiary account with these AAIs.

FTxx Ranges

The system uses the FTxx AAIs to track units, such as hours and miles, by billing rate code. The xx portion of the FT range represents a user-defined billing rate code. You can use these codes to track how the equipment is being used, and you can run reports, accordingly. For example, you might set up FTWR for billed working hours (where *WR* is the billing rate code for working), FTID for billed idle hours, FTDN for billed down hours, and so on.

If you do not use these AAIs to track units in the system, the system adds the units to the units field of the account that you define in the FTC AAI range or the FTC1 through FTC0 AAIs.

You must set up FTxx AAIs for company 00000. You can also set them up for specific companies.

FMJE Range

The system uses the FMJE range in the AAIs to determine the object accounts to use when you create equipment time entry models. The system recognizes this range of accounts as debit accounts. Set up this range to exclude accounts that you do not normally use in time entry but that you might have entered into an equipment time entry batch that was later used as a model.

When you set up the FMJE range in the AAIs, you must apply these rules:

- Set up two AAIs for each range of accounts.

  FMJE01 defines the beginning of the first range, and FMJE02 defines the end of the first range. FMJE03 defines the beginning of the second range, and FMJE04 defines the end of the second range, and so on.

- Define up to 49 account ranges with the last range being FMJE97 through FMJE98.

- Set up this AAI range for company 00000 only.

- Specify object accounts only.

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FA Range

The system uses the FA range in the AAIs to identify which asset cost accounts enable the system to create necessary equipment masters when you run a post to equipment. If you post a transaction with a cost account in the FA range for a piece of equipment that does not have an equipment master existing in the system, the program that you run to post costs to equipment creates the equipment master automatically.

When you set up the FA range, you must apply these rules:

- Define up to 49 FA ranges.

- Define only asset cost accounts for this AAI range.

- Set up item setup default coding for the asset cost account.

    The system uses the default values on the Item Setup Default Coding form to create equipment masters.

- FA ranges can be company specific, or you can use the default company 00000 to set up the FA range for all the companies at once.

    If you set up a company-specific FA range for one company, you must set up the FA ranges for all companies.

Understanding UDCs for Equipment

These UDCs are additional codes for equipment:

Equipment Billing Rate (00/RC)

Use these codes to define values for various equipment rates, such as available, idle, nonbillable, hourly, and so on. You must define equipment rate codes to run location or time entry billings. The codes you define are used by JD Edwards EnterpriseOne Equipment Billing to determine billing frequency and rate when you bill the equipment. The JD Edwards EnterpriseOne system provides a number of predefined billing rate codes that you can use or modify. You also can set up new billing rate codes.

Equipment Rate Tables (13/TB)

Use these codes to specify different rate tables for location billing.

Understanding System Features

JD Edwards EnterpriseOne Equipment Billing system features include:

- Equipment Information and Search
- Equipment Location Tracking

Equipment Information and Search

JD Edwards EnterpriseOne Equipment Billing enables you to locate, organize, and track the availability and repair status of equipment. This section discusses the types of information that you can use to search for equipment.

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Parent/Component Relationships

You can use parent and component relationships to group components in the system. For a piece of equipment, you can track the history of its immediate parent or any of its components. The system accommodates as many as 25 levels of components, which is useful if you use complex or interchangeable equipment assemblies.

A parent piece of equipment consists of other parts or components. It also can be a component of another piece of equipment.

A parent also can be a virtual or logical piece of equipment with component relationships to other logical equipment. For example, a manufacturing line can be a parent, and the associated manufacturing machinery can be components of the manufacturing line.

Equipment Numbers

You can identify equipment by any or all of these numbers:

- Equipment number
- Unit number
- Serial number

Supplemental Data

You can define supplemental data to record unlimited types of equipment information that is not stored elsewhere in the system. For example, use supplemental data to track equipment based on horsepower, capacity, and so on.

Location

You can search for and track equipment based on its historical, current, or planned location, which is helpful when you must review equipment that is used at a particular job site or reroute equipment between job sites.

Category Codes

You can define as many as 23 category codes to classify equipment for reporting and data selection purposes. For example, you can conduct online searches for equipment based on category codes that represent major accounting class, major equipment class, manufacturer, model year, and so on.

Other UDCs

You can assign these three additional UDCs:

- Finance methods
- Equipment status codes
- Equipment message types

For example, you can set up these equipment status codes to apply to each piece of equipment:

- Down
- Standby
- Working
- Available

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Licenses and Certifications

You can record and track license and permit information for each piece of equipment. Use this feature to track expiration dates and fees associated with equipment permits, certifications, and so on.

Online Message Logs

You can use online message logs to enter messages about a piece of equipment. Standard message types include:

- Planned maintenance
- Actual maintenance
- Problem reports

You also can enter additional remarks about any piece of equipment

Equipment Location Tracking

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

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

Understanding Charges for Equipment Use

You can distribute equipment cost or credit revenue to business units and jobs. Different jobs and job sites place unique demands on the equipment. For instance, unusually rocky soil may wear equipment more rapidly than other soil. Using JD Edwards EnterpriseOne Equipment Billing, you can reflect different conditions when you charge for equipment use. You can assign several billing rate codes for a single piece of equipment.

Time Billing

Use billing rate codes and rental rules to distribute equipment costs to any account in JD Edwards EnterpriseOne General Ledger and JD Edwards EnterpriseOne Job Cost. For example, you can set up billing rate tables by:

- Individual pieces of equipment
- Similar groups of equipment
- Effective dates

Use these systems to charge for equipment use by time:

- Time Accounting
- Payroll
- Equipment Billing

In addition, you can use time billing models to enter equipment time.

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Detailed Equipment Cost Accounting

You define the chart of accounts for the equipment cost and revenue to meet the unique needs, such as:

- Define a custom chart of accounts for the equipment cost and revenue.

  At any time, you can view these accounts at a summarized or detailed level.

- Analyze costs according to the operating hours or miles logged for equipment based on meter reading entries.

- Run reports on operating and maintenance costs based on costs per mile, costs per hour, or costs on a monthly, yearly, or acquisition-to-date basis.

Reporting

You can create a variety of reports to access a printed version of the equipment billing processes. Here are two such reports:

- Billing Rates report
- Location Tracking report

Understanding Equipment Billing System Flow

This diagram illustrates a typical flow of major processes within the JD Edwards EnterpriseOne Equipment Billing system:

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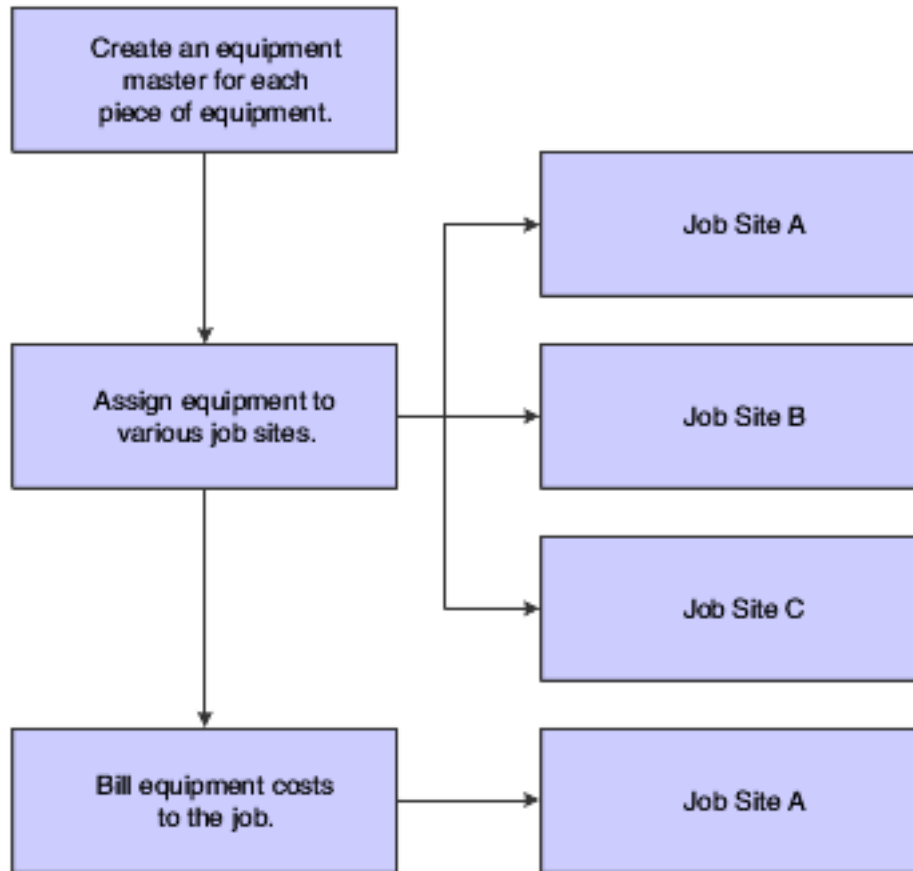
Understanding Equipment Billing Tables

This table lists the primary tables that JD Edwards EnterpriseOne Equipment Billing uses:

Primary Table	Description
Account Ledger (F0911)	Stores General Ledger journal entry audit trails for both the Asset Account Balances table (F1202) and the Account Balances table (F0902).
Asset Master (F1201)	Stores these basic information about each piece of equipment: • Equipment number • Description • Account coding • Category codes
Asset Account Balances (F1202)	Stores the account balance amount or unit for each equipment account.

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Primary Table	Description
Location Tracking (F1204)	Stores this location information for each piece of equipment: • Location. • Start effective date. • Ending date. • Equipment billing rate code. • Location code (this code indicates the type of location record, such as planned, current, or history).

Secondary Tables and Descriptions

This table lists the secondary tables that JD Edwards EnterpriseOne Equipment Billing uses:

Secondary Table	Description
User-Defined Codes (F0005)	Contains all user-defined system values.
Supplemental Data (F00092)	Stores supplemental data in either columnar or narrative format about equipment or work orders.
Automatic Accounting Instructions Master (F0012)	Contains information used to define the interfaces between JD Edwards EnterpriseOne CAM and the JD Edwards EnterpriseOne General Ledger chart of accounts.
Address Book Master (F0101)	Contains tax assessor and equipment user address information.
Account Master (F0901)	Maintains general ledger account data.
Default Accounting Constants (F12002)	Maintains default account information by company and asset cost account.
Default Depreciation Constants (F12003)	Maintains default information by company and asset cost account of all depreciation books and values.
Equipment Messages (F1205)	Stores user-generated messages regarding equipment maintenance.
Equipment License Master (F1206)	Stores license and permit information for equipment.
Location History Text (F1210)	Contains text for location history records.
Parent History (F1212)	Contains the history of parents for a component.
Specification Cross Reference (F1215)	Stores, by equipment class, the values of each field in the Specification Data table (F1216).
Specification Data (F1216)	Stores static equipment information, such as power requirements, size, capacity, and other nameplate information.

Secondary Table	Description
Equipment Rates (F1301)	Maintains billing rates used by equipment time billing and equipment location billing. Rates can be set up for specific rate groups, dates, and pieces of equipment. This table also is used to break up equipment rates into components if needed.
Equipment Distribution Rules (F1305)	Maintains distribution rules used by equipment location billing. This table stores account numbers used to charge for equipment use and transfer action codes (that is, rent to job, sold to job) which control how the system bills for the equipment use.
Status History (F1307)	Maintains a history of status changes to equipment and work orders.
Equipment Rate Code Definition (F1390)	Maintains a definition of each rate code. For example, what is its frequency (that is, monthly, weekly, and so forth), is it billable, and if it is part of a rate code hierarchy.
Equipment Category Code Mapping (F1391)	Maintains the rules by which the system automatically assigns equipment and business unit category codes when you create master records for new equipment or create work orders for equipment.

Setting Up the Billing Rate Code Hierarchy

This section provides an overview of the billing rate code hierarchy, lists prerequisites, and discusses how to set up the billing rate code hierarchy.

Understanding the Billing Rate Code Hierarchy

If you bill equipment by location, you must set up a billing rate code hierarchy for each billing rate code that you define. For instance, if you normally charge for a piece of equipment using a weekly rate but use the equipment at a particular site for only three days, the system needs to know the rate to charge for the equipment use. The system uses the hierarchy that you establish to determine when to use the daily rate code instead of the weekly rate code.

If you charge for a piece of equipment at a weekly rate, the billing rate code hierarchy includes only hourly and daily rates. If you assign a monthly rate to a job, the hierarchy also includes a weekly rate. For example, if you charge a piece of equipment for 10 days using a monthly rate, the system uses the weekly rate because it is lower than the sum of the daily rates and lower than the monthly rate.

In addition to establishing the hierarchy for billing rate codes, you can:

- Indicate whether a rate code is billable or nonbillable.

- Indicate billing frequency for a rate code.

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Prerequisites

Before you complete the tasks in this section, define billing rate codes in UDC 00/RC. If you are using Location Billing, you must also define valid billing rate codes on the Billing Rate Code Revisions form. If you are setting up a rate code for time entry, you must define the rate code in the UDC only.

See *Understanding Equipment Billing*.

Form Used to Set Up the Billing Rate Code Hierarchy

Form Name	FormID	Navigation	Usage
Billing Rate Code Revision	W13901B	Equipment Billing Setup (G1343), Billing Rate Code Setup Click Add on the Work with Equipment Billing Rate Codes form.	Set up the billing rate code hierarchy.

Setting Up the Billing Rate Code Hierarchy

Access the Billing Rate Code Revision form.

Equipment Rate Code
Enter a value from UDC 00/RC (Equipment Billing Rate Codes) that indicates a billing rate, such as **DY** for daily, **MO** for monthly, and **WK** for weekly.

You can set up multiple billing rates for a piece of equipment.

Blank: The system searches for a valid billing rate in this sequence:

   a. Account Ledger Master (F0901).

   This table contains the most detailed rate information. You can assign multiple rates for a job. For example, you can set up separate rates for different equipment working conditions.

   b. Job or Business Unit Master (F0006).

   This table contains less detailed rate information than the Account Ledger Master. You can set up only a single rate for a job based on this table.

   c. Rental Rules (F1302).

   This table contains the least detailed rate code information. The system searches this table according to the criteria that you establish when setting up the table.

Billing Frequency

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Enter a code that identifies the billing frequency to be used when the system processes location billings for a specific equipment rate code.

M: Monthly

W: Weekly

D: Daily

H: Hourly

Billable (Y/N) [billable (yes/no)]

Enter a code that indicates if the system processes location billings for a specific equipment rate code. Values are:

Y: Yes

N: No

Weekly Rate Code

Enter a value from UDC 00/RC (Equipment Billing Rate Codes) that is associated with a weekly rate code.

This enables you to set up a hierarchy of billing rates within the weekly rate code. For example, the bill rate code hierarchy for a weekly rate may be hourly, daily, and weekly.

This field applies to Location Billing clients only.

Daily Rate Code

Enter a value from UDC 00/RC (Equipment Billing Rate Codes) that is associated with a daily billing rate.

This enables you to set up a hierarchy of billing rates within the daily rate code. For example, the billing rate code hierarchy for a daily rate may be hourly and daily.

This field applies to Location Billing clients only.

Hourly Rate Code

Enter a value from UDC 00/RC (Equipment Billing Rate Codes) that is associated with an hourly billing rate.

This enables you to set up a hierarchy of billing rates within the hourly rate code. For example, the bill rate code hierarchy for an hourly rate may be only hourly.

This field applies to Location Billing clients only.

Setting Up Equipment Rates

When you run a location or time entry billing, the system searches for equipment rental rates to apply to a piece of equipment. For example, you can charge a higher hourly rate for a piece of equipment that is used for only a short period of time, or a lower hourly rate if the equipment is used for an extended period of time. You can charge seasonal rates for the use of equipment, and you can set up equipment rate tables for specific rate groups, dates, and pieces of equipment. If you use billing rate components, use Equipment Rates (P1301) to assign billing rates for each component.

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Form Used to Set Up Equipment Rates

Form Name	FormID	Navigation	Usage
Equipment Rates Revision	W1301B	Equipment Billing Setup (G1343), Equipment Rates Click Add on the Work with Equipment Rates form.	Set up equipment rates.

Setting Up Equipment Rates

Select Equipment Billing Setup (G1343), Equipment Rates.

To set up equipment rates, access the Equipment Rates form and then:

1. On the Work with Equipment Rates form, click Add.
2. On the Equipment Rates Revision form, complete the Rate Table field to set up an equipment rate table.
3. To further define the table, complete these optional fields:

    o Rate Group

    o Start Effective Date

    o Ending Effective Date

    o Equipment Number

4. To establish rental rates for the table, complete these fields:

    o Equipment Rate Code

    o Billing Rate

5. To define a limit for the table, complete the optional Replacement Cost field.
6. To further define the rental rate for the table, complete these optional rate component fields:

    o Ownership Component

    o Operating Component

    o Maintenance Component

    o Other Costs

    o Rate Component 05-10

    If you use billing rate components, the total of the components must equal the total billing rate amount. If you leave the billing rate amount blank, the system calculates a new billing rate amount based on the rate component amounts that you enter.

7. Click OK.

You can use AAIs FTC1 through FTC0 ranges to define the account numbers for the rate components. These are the revenue credit accounts for billing rate components 1 through 10. When you post location billings or time entry billings,

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the system creates the revenue entries for the amount in each component using the account numbers for this AAI and posts them to the Account Ledger table (F0901).

Setting Up Rental Rules

You specify the equipment rate table that you want the system to apply to a time or location billing by setting up rental rules. In addition, for location billing, you use rental rules to:

- Specify equipment billing limits after which the system changes to another rental rate table.
- Override effective dates to keep one rate table in effect, regardless of future changes.
- Set proration rules to determine whether the system calculates equipment charges based on the hierarchy that you established for equipment rate codes, or based on a monthly proration basis.
- Indicate the hierarchy of equipment rate tables that you want to use.
- Indicate whether a piece of equipment was sold or rented to the job.
- Define standard work days and hours.

When you sell a piece of equipment to a job, the system bills a one-time cost to that job. When you rent a piece of equipment to a job, the system bills a recurring cost for as long as the equipment is located at the job.

You use the Billing Limit and Rental Threshold fields in conjunction with the replacement cost from either the Equipment Rates Revision form (W1301B) or the Insurance Information form (W12012A). When you use these fields, you can control how the system determines when to:

- Use the next rate table you have set up for a job.
- Sell or rent a piece of equipment to a job.

If you use the billing limit feature, and if the billing limit is reached during a billing:

- If the subsequent table has a zero value for the next rate, the program automatically adjusts the billing amount to bill only up to the billing limit amount.
- If the subsequent table has a nonzero value for the next rate, the program bills according to the current table.

You can set up holidays in UDC 98/HL (Calendar Holidays). The system highlights user-defined holidays on the Billable Days calendar.

You must set up equipment rental rules for each company and define the values for each job or business unit within that company.

> **Note:** You must set up a default company (company 00000) and a blank job default for each company. As a minimum, you must set up a blank job for company 00000.

Form Used to Set Up Rental Rules

Form Name	FormID	Navigation	Usage
Rental Rules Revisions	W1302B	Equipment Billing Setup (G1343), Rental Rules	Set up rental rules.

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Form Name	FormID	Navigation	Usage
		Click Add on the Work With Rental Rules form. Complete the information on the tabs.	

Setting Up Rental Rules

Access the Rental Rules Revisions form.

Table Information

Default Table 01-Default Table 05

Specify a value from UDC 13/TB (Equipment Rate Tables) that designates the default table desired.

The system searches five default rate tables to find a valid match with the rate code in this sequence:

- ○ Rate Table fields.

  Within each rate table, the system searches first for the item number/rate group/rate table. If the system does not find a match, it searches for the rate group/rate table.
- ○ If no match is found in the first table, the system searches the next table, and so on until the program searches through the fifth rate table, if necessary.
- ○ If no match is found, the system then searches for the company default rules set up for the blank job.
- ○ If no match is found, the system applies the rules that you set up for company 00000.

Percent Override 01-Percent Override 05

Specify a percentage value for each rate table that you specify for the job.

The Location Billing program calculates the percentage that you enter in this field times the rate code for a specific rate table. For example, if the rate code of **HR** (hourly) equals **100,** and the percentage equals **80,** the amount charged equals 80 (100 x 80 percent)

Additional Table

Enter the rate table used as an additional charge or credit during billing.

Some examples are an additional charge for overtime (harsh usage) or a credit for a preferred customer.

Defaults

Equipment Rate Code

Enter a value from UDC 00/RC (Equipment Billing Rate Codes) that indicates a billing rate, such as **DY** for daily, **MO** for monthly, and **WK** for weekly.

You can set up multiple billing rates for a piece of equipment. If you leave this field blank, the system searches for a valid billing rate in this sequence:

- a. Account Ledger Master (F0901).

  This table contains the most detailed rate information. You can assign multiple rates for a job. For example, you can set up separate rates for different equipment working conditions.
- b. Job or Business Unit Master (F0006).

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This table contains less detailed rate information than the Account Ledger Master. You can set up only a single rate for a job based on this table.

c. Rental Rules (F1302).

This table contains the least detailed rate code information. The system searches this table according to the criteria that you establish when setting up the table.

Rental Threshold

Enter the threshold amount that determines whether a piece of equipment is rented to the job or sold to the job.

If the replacement value for a piece of equipment is less than the rental threshold, it is sold to the job. If the replacement value for a piece of equipment is greater than the rental threshold, it is rented to the job.

Prorate Billing (Release 9.2 Update)

Enter a value to specify whether billings are calculated on a hierarchical basis, or are prorated on a monthly basis.

For the hierarchical basis, the Location Billing program (R1304) calculates billing using the rate code that is lower in hierarchy to the rate code associated with the job. The hierarchical order from the lowest is hourly, daily, weekly, and monthly rate. For example, if you bill a piece of equipment to a job using a weekly rate but use that equipment only for three days, you can use the daily rate code associated with that weekly rate code.

For the prorated basis, the system calculates the billing using the ratio of the number of days that the equipment is used to the total number of working days in the month. For example, if there are 20 working days in the month and you use a piece of equipment for five days, the system charges 25% of the monthly rate.

If you do not specify proration, the system uses monthly, weekly, daily, or hourly rate codes to determine the billing amount. Values are:

Y: Prorate the monthly rate. You must define the equipment rate code as monthly (applicable to both history and current location records).

N: Use the hierarchical basis until the monthly rate is reached (hierarchy is applied only for the history location record. For current location, the system generates the billing record only when the billing period is equal to or greater than one month. The system then uses the monthly rate and prorates of the monthly rate).

H: Use hierarchical basis always (applicable only to the history location record).

Buyback Percent

Enter the percentage of the replacement cost at which the equipment is bought back from a job to which it was sold.

The equipment is bought back when transferred off a job.

Bill Weekends (Y/N) [bill weekends (yes/no)]

Enter either **Yes** or **No** to indicate whether weekends are billable days or nonbillable days for a specific location.

Billing Date

Enter the date that determines which rate table to use when calculating billing.

For example, if the rates for a table have changed, but you do not want a particular asset charged the new rates, you can enter a date in the billing date field, and that date will be used to locate another rate table. Use this field if you want to specify a special rate table for the entire duration of a job.

Beginning Time

Enter the standard beginning hour for the work day.

For instance, in office work, the standard beginning hour would be 8:00 a.m. for a standard 8:00 a.m. to 5:00 p.m. day.

Ending Time

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Enter the standard ending hour for the work day.

For instance, in office work, the standard ending hour would be 5:00 p.m. for a standard 8:00 a.m. to 5:00 p.m. day.

Billing Limits

Billing Limit Percent

Enter the billing limit that is a percentage of the asset's replacement cost.

Once the billing limit for an asset has been reached, a new reduced rate may be charged and is specified in the next rate table and its associated percentage.

Subsequent Rate Table

Enter a value to identify the rate table that you want the system to use once the billing limit from the previous table has been reached.

Subsequent Percent Override

Enter the percentage factor used in conjunction with the next rate table specified after the billing limit has been reached.

Setting Up Billable Days

You set up billable days to define which days on a calendar are billable and which are nonbillable.

Forms Used to Set Up Billable Days

Form Name	FormID	Navigation	Usage
Work With Calendars	W1302F	Equipment Billing Setup (G1343), Rental Rules Click Find to locate a job for which you want to define billable days. Select the record and then select Calendar from the Row menu.	Locate jobs for which you need to set up billable days.
Billable Days Calendar	W1302E	Complete the fields and click Add on the Work With Calendar form.	Set up billable days.

Setting Up Billable Days

Access the Rental Rules form.

1. On the Work With Rental Rules form, complete these fields and click Find to locate a job for which you want to define billable days:

    ○ Company

    ○ Job

2. Select the record and then select Calendar from the Row menu.
3. On the Work With Calendars form, complete these fields and click Add:

    ○ Date - MO

    ○ Date - YR

    The system displays the Billable Days Calendar form. This form indicates all of the billable days for the month and year that you specified in the previous step. The system automatically indicates weekdays as billable. If you specify weekends as billable on Rental Rules Defaults, the system indicates that Saturdays and Sundays are billable.

    The system recognizes holidays as nonbillable days in the calendar if setup in UDC 98/HL (Calendar Holidays).

4. On the Billable Days Calendar form, enter a nonbillable day type for each day that you do not want equipment to be billed, and then click OK.

    The JD Edwards EnterpriseOne system provides several predefined day type codes in UDC 00/TD (Type of Day). Equipment Billing uses only the billable and nonbillable day type codes (**B** and **N,** respectively).

Setting Up Equipment Distribution Rules

Set up equipment distribution rules to provide the system with instructions for the distribution of equipment location billings. When you set up equipment distribution rules, you supply the system with this information:

- Billing account numbers for location billings.

- Transfer action codes to determine whether to rent or sell to job.

The system uses the information that you set up in the Equipment Distribution Rules table (F1305) to search for the proper accounts to charge for the use of equipment based on its location. You must set up a table for equipment distribution rules for every company that requires distribution rules. As a minimum, you should set up a default table for company 00000. The rules that you specify in the default table apply to all companies that do not require equipment distribution rules. You should also set up a blank job for all companies, including company 00000. The system uses the blank job when you specify an account with no specific distribution information, such as job, rate group, or equipment number.

Equipment Information

Equipment distribution rules can be set up based on any of this equipment information:

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Information Type	Description
Job	The location or business unit where the equipment is being used, stored, or maintained. The system searches for a location for equipment. For example, you can specify that all equipment at a job be charged to a specific account.
Rate group	The system searches for an equipment rate group. You use category code 10 to set up rate groups. For example, you can specify that all equipment that is grouped together as backhoes be charged to a specific account.
Equipment number	The system searches for a specific piece of equipment by the equipment number. For example, you can specify that backhoe #426 be charged to a specific account.

When you relocate equipment, the system searches the Equipment Distribution Rules table (F1305) for information that matches the equipment information. After the system finds a match, it derives the account information from the table and discontinues the search. If the system finds no match, it applies the rules that you set up for the default company.

Search Sequence Information

The system searches from the most specific to the most general account distribution information that you set up in the Equipment Distribution Rules table. Refer to the this search sequence information to determine appropriate combinations for the equipment distribution requirements:

Step	Description
Step 1	1. Job 2. Rate Group 3. Equipment Number If the system does not find a rule that applies to this specific distribution information, it continues to step 2.
Step 2	1. Job 2. Rate Group If the system does not find a rule that applies to this specific distribution information, it continues to step 3.
Step 3	Job If the system does not find a rule that applies to this specific distribution information, it continues to step 4.
Step 4	1. Rate Group 2. Equipment Number If the system does not find a rule that applies to this specific distribution information, it continues to step 5.
Step 5	Rate Group

Step	Description
	If the system does not find a rule that applies to this specific distribution information, it continues to step 6.
Step 6	Equipment Number If the system does not find a rule that applies to this specific distribution information, it continues to step 7.
Step 7	If the system does not find a rule after completing each search sequence step, it uses the distribution information that you specify for company 00000.

For example, you can set up an equipment distribution rule for company XYZ. The rule specifies that all billings for rate group 003 equipment be charged to a business unit that you identify as SHOP within the company.

You also can set up a second rule for the same company and rate group, but specify job 101 (business unit YARD) for a selected piece of equipment. This rule overrides the first rule. Based on this rule, the system distributes the billing for the selected equipment to the business unit YARD.

Form Used to Set Up Equipment Distribution Rules

Form Name	FormID	Navigation	Usage
Equipment Distribution Rules Revisions	W1305B	Equipment Billing Setup (G1343), Equipment Distribution Rules Click Add on the Work with Equipment Distribution Rules form.	Set up equipment distribution rules.

Setting Up Equipment Distribution Rules

Access the Equipment Distribution Rules Revisions form.

1. Complete these fields:

   - Company
   - Business Unit
   - Object Account
   - Subsidiary

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2. For each distribution account, complete any of these fields:

   ○ Job

   ○ Rate Group

   ○ Equipment Number

   If you are setting up the default distribution account for a specific company, leave these fields blank.

3. Complete the optional Transfer Action field.

   If you leave this field blank, the system uses the values from the Rental Threshold field on the Rental Rules Defaults form and the Replacement Cost field on the Equipment Rates Revision form to determine whether the piece of equipment is rented or sold to a job.

4. Complete these optional fields and click OK:

   ○ Subledger

   ○ Subledger Type

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6 Setting Up Inventory

Setting Up Inventory

> **Note:** This chapter contains important information that you need if you use JD Edwards EnterpriseOne Inventory Management to manage parts inventories.

Understanding Inventory

You can plan for future parts needs by reviewing information that the system provides about parts and part quantities. For example, you can monitor quantity information about how many parts are on demand, available in supply, and available to be promised. To use quantity information to determine the current and future inventory needs, you must understand these concepts.

Stocking Types

In most inventory environments, such as a manufacturing, nonstock parts are rare. Within the maintenance organization, however, the demand for parts is often not predictable; it is impractical to stock every part for which a future demand might exist. Generally, maintenance planners consider inventory as a way to handle emergency replacement parts, and as a temporary holding area for stock and nonstock parts.

This table lists the three stocking types that exist within the maintenance organization:

Stocking Type	Description
Stock parts	The most vital parts for which you know predictable demand exists, such as parts required for routinely scheduled maintenance tasks. Typically, you need to maintain a physical inventory of these parts.
Pseudo nonstock parts	Parts for which you do not need to keep a physical on-hand quantity, such as parts that are required for future maintenance tasks, or parts that are easily and quickly acquired. Typically, you do not need to maintain a physical inventory of these parts; but you do want to maintain inventory records to help with planning and to simplify purchasing. You can set up pseudo nonstock parts with an inventory master record and indicate an on-hand quantity of zero.
Nonstock parts	Parts for which you rarely have a need and for which you do not need an inventory master record.

On-Hand Quantity Versus Available Quantity

On-hand quantity refers to the number of parts that are physically in stock in the primary unit of measure. On-hand quantity of parts can be affected by:

- Variances recorded following a physical inventory.

- Daily removals, additions, or transfers of parts.

- Shipment confirmations or updated sales information.

- Locations with lots on hold, such as parts requiring inspection or placed in quarantine.

Available quantity refers to the number of parts that you can use, based on user-defined calculations. You determine how the system calculates part availability by defining the factors that subtract from, or add to, the available quantity of a part. This calculation can include quantities that do not immediately affect on-hand amounts.

For example, you can set up the availability calculation to subtract any quantities that are committed to work orders, and to add any quantities that are included in purchase orders or in transit.

Commitments

When you set up general planning constants, you can specify whether the system uses hard or soft commitments to commit parts to a work order.

When you specify hard commitment, the system:

- Indicates an actual reduction in inventory at the point that the maintenance task creates a demand for the part.

- Specifies a location from which to remove the part.

When you specify soft commitment, the system:

- Does not indicate an actual reduction in inventory at the point that the maintenance task creates a demand for the part.

- Does not specify a location from which to remove the part.

This diagram illustrates how JD Edwards EnterpriseOne Inventory Management commits inventory:
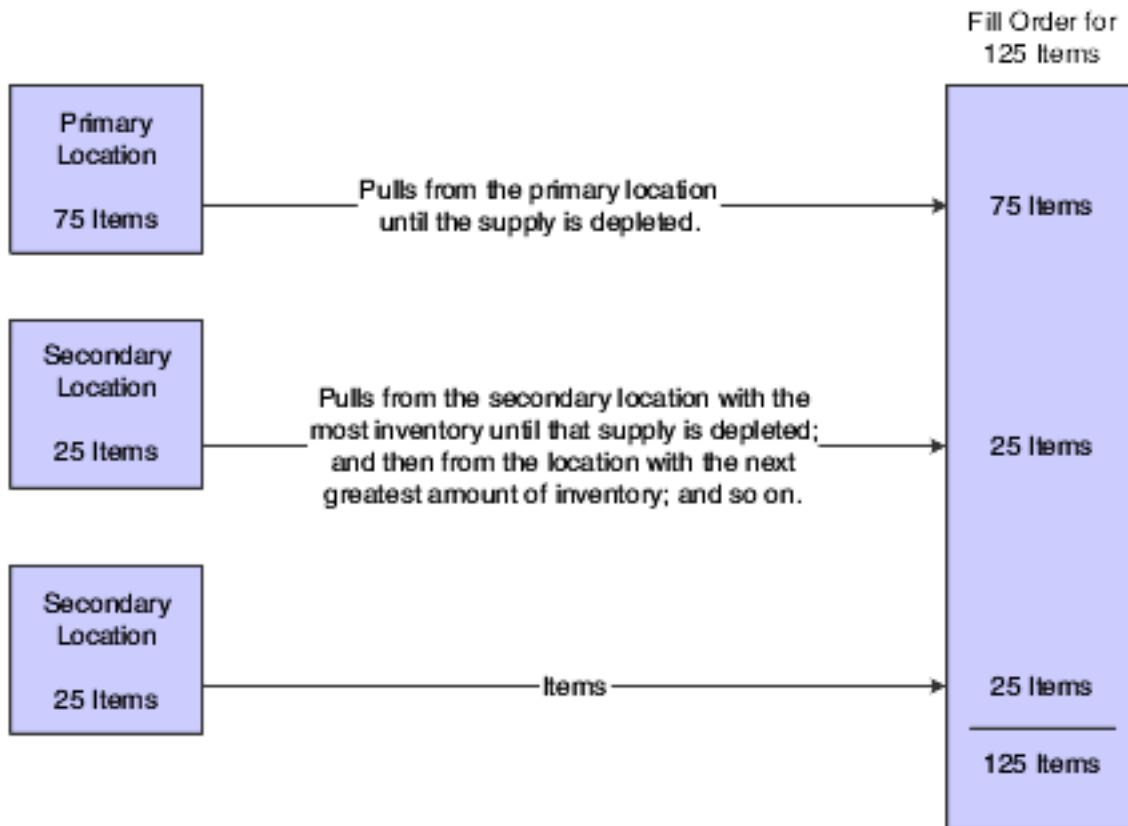
Supply and Demand Quantities

The system uses supply and demand inclusion rules to calculate the supply and demand quantities for an inventory part. Unlike a manufacturing environment, where work orders create a supply of parts or materials, work orders in a maintenance environment create a demand for parts.

Starting with the requested date on the work order parts list, the system calculates the demand quantity from these sources:

- Work order requirements and parts lists: the quantity required minus the quantity issued.

- Safety stock: any quantity reserved as protection against fluctuations in demand and supply.

Starting with the requested date on the purchase order, the system calculates the supply quantity from these sources:

- On-hand inventory: the quantity on hand minus hard commitments and quantities on work orders.

- Purchase orders: the quantity that is entered on purchase orders.

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Setting Up Inventory in the Item Master

To ensure that maintenance planning features function properly, several fields on Item Master Revisions and Item/ Branch Plant Information require special attention. You can access both forms within JD Edwards EnterpriseOne Inventory Management.

This section discusses how to:

- Enter item master records.
- Enter item/branch plant information.
- Enter additional system information.
- Assign parts to a master planning family.

> **Note:**
>
> - *"Entering Item Master Information" in the   JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide   .*
>
> - *"Entering Branch Plant Information" in the   JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide   .*

Forms Used to Set Up Inventory in the Item Master

Form Name	FormID	Navigation	Usage
Work With Item Master Browse	W4101E	Inventory Master/ Transactions (G4111), Item Master	Locate and select existing inventory items.
Item Master Revisions	W4101A	Click Add on the Work with Item Master Browse form, or select an item and click Select.	Enter Item Master records.
Work With Item Branch	W41026E	Select an item on the Work With Item Master Browse form, and then select Item Branch from the Row menu.	Locate existing branch/ plant information for an item.
Item/Branch Plant Info	W41026A	Click Add on the Work With Item Branch form, or select a branch record and click Select.	Enter item branch/plant information.
Additional System Information	W4101C	Select an item on the Work With Item Master Browse form, and then	Enter additional system information.

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Form Name	FormID	Navigation	Usage
		select Addl System Info from the Row menu.	Specify the rules by which the system plans for, orders, and issues parts.
Category Codes	W4101B	Select an item on the Work With Item Master Browse form, and then select Category Codes from the Row menu.	Assign parts to a master planning family. To aid in parts planning and inquiry functions, you can assign each part to a master planning family. If you did not enter a planner number or a buyer number on either the Item Master Revisions form or Item/Branch Plant Info. form, you must enter a value for the master planning family.

Entering Item Master Records

Access the Item Master Revisions form.

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Item Master Revisions

Work With Item Master Browse	Item Master Revisions

✓ ✗ ⟊ Form ‹ › ⚙ Tools

		Item Number (Short)	60003
Item Number	1001		

Basic Item Data	Additional Info.	Weights and Measures	Lot Processing

Catalog Number	1001		
Description *	Bike Rack - Trunk Mount		
Description 2		Search Text	Bike, Rack

Stocking Type *	P	Purchased inc. Raw Material	Inventory Cost Level	2	Item/Branch Only
G/L Class	IN30	Manufactured Finished Goods	Sales Price Level	3	Item/Branch/Location/Lot
Unit of Measure	EA	Each	Purchase Price Level	2	Supplier/Item/Branch Level
Line Type	S	Stock Inventory Item	Kit/Configurator Pricing Method	1	Total Components List Prices
Bulk/Packed Flag	P	Packaged Item	Configurator Costing Method		Non Configured Item
Planner Number	8444	O'Malley, James	Commitment Method	1	Location With Most Quantity
Buyer Number	8444	O'Malley, James	Print Message		.
			Item Flash Message		.

G/L Class (general ledger class)

Enter a value from user-defined code (UDC) table 41/9 (G/L Posting Category) that identifies the general ledger offset that the system uses when it searches for the account to which it posts the transaction.

If you do not want to specify a class code, you can enter ******** (four asterisks) in this field.

You can use automatic accounting instructions (AAIs) to predefine classes of automatic offset accounts for:

- ○ JD Edwards EnterpriseOne Inventory Management.
- ○ JD Edwards EnterpriseOne Procurement.
- ○ JD Edwards EnterpriseOne Sales Order Management.

Here are some examples of general ledger class codes that you might assign:

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IN20: Direct Ship Orders

IN60: Transfer Orders

IN80: Stock Sales

The system can generate accounting entries based upon a single transaction. For example, a single sale of a stock item can initiate the generation of accounting entries similar to these:

- ○ Sales-Stock (Debit) xxxxx.xx.
- ○ A/R Stock Sales (Credit) xxxxx.xx.
- ○ Posting Category: IN80.
- ○ Stock Inventory (Debit) xxxxx.xx.
- ○ Stock COGS (Credit) xxxxx.xx.

The system uses the class code and the document type to find the AAI.

Line Type

Enter a code that controls how the system processes lines on a transaction.

The line type controls the systems with which the transaction interfaces, such as these:

- ○ JD Edwards EnterpriseOne General Ledger.
- ○ JD Edwards EnterpriseOne Job Cost.
- ○ JD Edwards EnterpriseOne Accounts Payable.
- ○ JD Edwards EnterpriseOne Accounts Receivable.
- ○ JD Edwards EnterpriseOne Inventory Management.

The line type also specifies the conditions under which a line prints on reports, and it is included in calculations. Values include:

S: Stock item

J: Job cost

N: Nonstock item

F: Freight

T: Text information

M: Miscellaneous charges and credits

W: Work order

You should select a line type according to the stocking method for the part. For example, if you are creating a master for a pseudo-nonstock item (one for which you do not want to maintain physical on-hand quantity but that you want to track as an inventory item), select a line type that interfaces with inventory.

Line type **N** has special logic that the system uses to process parts that are truly nonstock and for which you do not maintain inventory master information.

You must complete these fields for each maintenance part that needs a master record.

> **Note:** The values that you enter in these fields are the default values in the same fields on the Item/Branch Plant Information form.

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To use parts planning functions in CAM, you must enter a value in at least one of these fields for each part:

- Planner Number
- Buyer Number
- Master Planning Family

The Planner Number and Buyer Number fields are located on the Item Master form, as well as on the Item/Branch Plant Info. form. The Master Planning Family field is located on the Category Codes form.

Entering Item/Branch Plant Information

Access the Item/Branch Plant Info. form.

Entering Additional System Information

Access the Additional System Information form.

You must complete the fields on this form to specify the rules by which the system plans for, orders, and issues parts.

Order Policy Code
Enter a value from UDC H41/OP (Order Policy Code) that specifies the rules for inventory reordering in the Requirements Planning and Procurement systems. Values are:

0: Reorder point (Not planned by MPS/MRP/DRP)

1: Lot-for-lot or as required.

2: Fixed order quantity.

3: Economic order quantity (EOQ).

4: Periods of supply.

5: Rate scheduled item.

> **Note:**
>
> These values are hard-coded.
>
> You should enter a **1** in this field.

Issue Type Code
Enter a value from UDC 41/IT (Issue Type Code) that indicates how the system issues each component in the bill of material from stock.

In Shop Floor Management, the issue type code indicates how the system issues a part to a work order. Values are:

Blank: Shippable end item.

I: Manual issue.

F: Floor stock (there is no issue).

B: Backflush (when the part is reported as complete).

P: Preflush (when the parts list is generated).

U: Super backflush (at the pay-point operation).

S: Subcontract item (send to supplier).

You can issue a component in more than one way within a specific branch/plant by using different codes on the bill of material and the work order parts list. The bill of material code overrides the branch/plant value.

> **Note:** With the exception of floor stock items, such as small hardware, fasteners, and so on, you should enter an **I** in this field to indicate a manual issue for maintenance parts.

Planning Fence Rule

Enter a value from UDC 34/TF (Time Fence Rule) that the system uses in conjunction with the Planning Time Fence Days field to determine how forecast demand or actual customer demand is used. For example, you can enter these values:

S: Tells the system to plan using customer demand before the time fence and forecast after the time fence.

F: Tells the system to plan using forecast before the time fence and forecast plus customer demand after the time fence.

If you enter **5** in the Planning Time Fence Days field and **S** in this field, then the system uses only customer demand for the regeneration for the first five days. After five days, the system uses the forecast for the regeneration.

Values are:

C: Customer demand before, greater of forecast or customer demand after.

F: Forecast before, forecast plus customer demand after.

G: Greater of forecast or customer demand before, forecast after.

S: Customer demand before, forecast after.

1: Zero before, forecast after 3 Zero before, forecast plus customer demand after.

Planning Fence

Enter the number of days that the system uses in conjunction with the time fence rule to determine how the forecast is used.

Enter the number of days after the start date when the time fence rule changes from the first rule to the second rule. For example, if the time fence rule is **S** (customer demand before the time fence, forecast after the time fence), the generation start date is January 03, and the planning time fence is **3** days, the system plans using customer demand through January 06. Beginning on January 07, the system plans using the forecast.

> **Note:**
>
> Notice that the system does not count the generation start date; that is, the day after the generation start date is day one.
>
> For manufactured items, the system counts working days, as defined in the Shop Floor Calendar form.
>
> For purchased items, the system counts calendar days.

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Freeze Fence

Enter the number of days from the generation start date within which the system does not generate action messages.

For example, if the generation start date is January 03, and the freeze time fence is **3** days, the JD Edwards EnterpriseOne Requirements Planning system does not generate messages with required dates that are less than or equal to January 06.

> **Note:**
>
> The system does not count the generation start date; that is, the day after the generation start date is day one.
>
> For manufactured items, the system counts working days, as defined in the Shop Floor Calendar form.
>
> For purchased items, the system counts calendar days.

Assigning Parts to a Master Planning Family

Access the Category Codes form.

Commodity Class

Enter a value from UDC 41/P1 (Commodity Class Code) that represents an item property type or classification, such as commodity type, planning family, or so forth.

The system uses this code to sort and process like items. This field is one of six classification categories available primarily for purchasing purposes.

Master Planning Family

Enter a value from UDC 41/P4 (Master Planning Family) that represents an item property type or classification, such as commodity type or planning family.

The system uses this code to sort and process like items. This field is one of six classification categories available primarily for purchasing purposes.

Setting Up Inventory Management and Procurement for CAM Users

The JD Edwards EnterpriseOne Inventory Management and JD Edwards EnterpriseOne Procurement setup tasks described in this section have special implications for JD Edwards EnterpriseOne CAM users.

This section provides overviews of line types and stocking type codes and discusses how to:

- Set up line types.
- Set up branch/plant constants.

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Understanding Line Types

Line types control how parts transactions interface with the JD Edwards EnterpriseOne General Ledger and JD Edwards EnterpriseOne Inventory Management. Specifically, the line type that you assign to a part is a code that:

- Controls with which of four systems the transaction interfaces, such as JD Edwards EnterpriseOne General Ledger, JD Edwards EnterpriseOne Inventory Management, JD Edwards EnterpriseOne Accounts Receivable, and JD Edwards EnterpriseOne Accounts Payable.

- Specifies the conditions for printing a line on reports.

- Specifies the conditions for including a line in calculations.

You set up line types in JD Edwards EnterpriseOne Procurement. Depending on the planning and reporting needs, you might need to set up an additional line type to differentiate pseudo-nonstock part transactions from genuine nonstock part transactions.

> **Note:** You need to be thoroughly familiar with order line types before you add or modify them. Extreme damage to the system can occur if you do not set up order line types with precision and logic.

Understanding Stocking Type Codes

When setting up stocking type codes from the UDC 41/I (Stocking Type Code), do not use hard-coded stocking types. Instead, create your own stocking type and enter an **M** or **P** in the second description line. Do not enter a **K** (kit); this code is reserved for sales order processing.

> **Note:** You can use the hard-coded stocking types if you are actually using the parts for their intended purposes.

Forms Used to Set Up Inventory Management and Procurement for CAM Users

Form Name	FormID	Navigation	Usage
Line Type Constants Revisions	W40205B	Procurement System Setup (G43A41), Order Line Types Click Add on the Work With Line Types form, or select a line type and click Select.	Set up line types.
Branch/Plant Constants	W41001H	Inventory Setup (G4141), Branch/Plant Constants Click Add on the Work With Branch/Plant	Set up branch/plant constants. Ensure that inventory transactions create

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Form Name	FormID	Navigation	Usage
		Constants form, or select a branch/plant and click Select.	journal entries in the general ledger. In addition, you can specify a description for inventory transactions.

Setting Up Line Types

Access the Line Type Constants Revisions form.

These fields have special significance for JD Edwards EnterpriseOne CAM users:

G/L Interface (general ledger interface)
Enter a code that indicates whether the system reflects the monetary amount or unit value of any activity containing this order line type in the general ledger.

A check mark indicates that the system reflects the monetary amount or unit value of any activity containing this order line type in the general ledger.

JD Edwards EnterpriseOne CAM users should select this option.

Inv. Interface (inventory interface)
Enter a value from UDC H40/IV (Inventory Interface) that identifies the type of interface to JD Edwards EnterpriseOne Inventory Management. Values are:

Y: The dollar or unit value of any activity containing this line type will be reflected in inventory. The system also edits the item that you enter to ensure that it is a valid item. **Y** is the default value.

A: The system recognizes the number that you enter as a general ledger account number. The system uses this code in purchasing only.

B: The system performs edits when using format 4 in purchase order entry.

The system retrieves price data from the inventory tables, but does not update the quantity on the purchase order. This code is valid only when you have set the G/L Interface field to **Y** (yes). Budget checking is fully functional when you use this interface code.

D: The item in this line is an inventory item that will not affect availability or quantities.

N: The item is not an inventory item.

To verify whether the item exists in the Item Master file, use Inventory Interface **N** in conjunction with the Edit the Item Master for Non-Stock Items flag.

Setting Up Branch/Plant Constants

Access the Branch/Plant Constants form.

Interface G/L (Y/N) [interface general ledger (yes/no)]

Enter a code that indicates whether inventory transactions that are processed through this branch/plant create general ledger entries.

A check mark indicates that the system creates general ledger entries for inventory transactions for this branch/plant.

Write Units to Journal Entries

Enter a code that indicates whether the system moves units to the general ledger after the system records a journal entry from these programs:

- P31111 (Work Order Inventory Issues).
- P31112 (Work Order Completions).
- P31802 (Work Order Journal Entries).
- P31842 (Rate Base Journal Entries).
- P4112 (Inventory Issues).
- P4113 (Inventory Transfers).
- P4114 (Inventory Adjustments).
- P4116 (Item Re-Classification).
- P41413 (Cycle Count Update).
- P41610 (Tag Update).
- P42800 (Sales Update).
- P4312 (Receipts).
- P4314 (Voucher Match).
- P415021 (Update Operational Reconciliation).
- P415101 (General Stock Movements).
- P41514 (Bulk Manufacturing Gains/Losses).
- P49800 (Sales Update - A7.3 ECS Version).
- P49700 (Cycle Billing).
- P49510 (Bulk Load Confirmation - XT49799).
- P49515 (Bulk Load Confirm Batch - XT49799).
- P49530 (Package Load Confirm - XT49799).
- P49572 (Upload Gantry Data - XT49799).
- P49710 (Bulk Delivery Confirm - XT49799).
- P49711 (Bulk Delivery Confirm Milk Run - XT49799).
- P49715 (Bulk Disposition - XT49799).
- P49720 (Package Delivery Confirm - XT49799).
- P49731 (Mass Confirm Batch - XT49799).

General Ledger Explanation

Enter a value from UDC H41/PR (General Ledger Explanation) that Inventory Management uses to select the default description that appears on the second line of a journal entry in the general ledger. Values are:

1: Item master description (the default).

2: Primary item number.

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7 Setting Up Preventive Maintenance

Understanding AAIs for PMs

AAIs define the rules by which PMs and JD Edwards EnterpriseOne General Ledger interact. When you define AAIs, you establish how the system processes transactions for various programs.

> **Note:**
>
> - *"Setting Up Automatic Accounting Instructions" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide .*
>
> - *"Automatic Accounting Instructions" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide .*
>
> - *"Entering Additional Asset Information" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide .*

Preventive Maintenance AAIs

Preventive maintenance AAIs consist of:

- AT00 - Identifies the statistical account for units, such as hours.
- FMA - Identifies the statistical account for units, such as fuel.
- FMB - Identifies the statistical account for units, such as miles.
- FMC - Identifies the statistical account for the original meter reading that corresponds to the FMA statistical account.
- FMD - Identifies the statistical account for the original meter reading that corresponds to the FMB statistical account.
- FME - Identifies the statistical account for the original meter reading that corresponds to the AT00 statistical account.
- FMF - Identifies the statistical account for meter 4 units.
- FMG - Identifies the statistical account for meter 5 units.
- FMH - Identifies the statistical account for meter 6 units.
- FMI - Identifies the statistical account for the original meter reading that corresponds to the FMF statistical account.
- FMJ - Identifies the statistical account for the original meter reading that corresponds to the FMG statistical account.
- FMK - Identifies the statistical account for the original meter reading that corresponds to the FMH statistical account.

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FMA, FMB, FMF, FMG, FMH, and AT00 AAIs

The system uses these AAIs to determine the statistical accounts to use when equipment accumulates units such as miles, hours, fuel, and so on. The system uses statistical units to track equipment use. Programs that use these AAIs include:

- Meter Readings
- PM Schedule
- Update PM Schedule
- PM History and Completion
- Equipment Cost Analysis

When you set up FMA, FMB, FMF, FMG, FMH, and AT00 AAIs, you can set them up to be company-specific. In addition, you must apply these rules:

- Include a business unit and object account for each AAI.
- Do not include a subsidiary account.

  Note: If you perform preventive maintenance based on equipment use measured by billed hours, you can use the same accounts for these AAIs as you use for billing accounts. AAIs applicable to equipment billing include FTC, FTC1-FTC0, and FTxx.

FMC, FMD, FME, FMI, FMJ, and FMK AAIs

The system uses these AAIs to define the statistical account that records the original meter reading as determined by the Meter Readings program. Each of these AAIs corresponds to a statistical account:

- FMC corresponds to the FMA account.
- FMD corresponds to the FMB account.
- FME corresponds to the AT00 account.
- FMI corresponds to the FMF account.
- FMJ corresponds to the FMG account.
- FMK corresponds to the FMH account.

When you set up FMC, FMD, FME, FMI, FMJ, and FMK AAIs, you can set them up to be company-specific. Additionally, you must apply these rules:

- Include a business unit and object account for each AAI.
- Do not include a subsidiary account.

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Setting Up PM Rules for Schedules

This section provides an overview of PM schedules and maintenance rules, lists prerequisites, and discusses how to set up maintenance rules.

> **Note:**
>
> - *"Setting Up Standard Procedures" in the JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide .*

Understanding PM Schedules

PM schedules are the foundation of the preventive maintenance program. PM schedules determine the types of service and the frequency of each service type for each piece of equipment that you maintain. Before you can use the preventive maintenance features of JD Edwards EnterpriseOne Plant and Equipment Management, you must provide the system with this PM schedule information:

Standard Procedures

When you set up a PM schedule for a piece of equipment, you can assign standard procedures to the various maintenance tasks. The system uses standard procedures in the same way as user-defined codes with the exception that you can attach virtually unlimited text to a standard procedure.

Standard procedures on the PM schedule are only used if you are not using model work orders which also support standard procedures.

Maintenance Rules

When you set up a PM schedule for a piece of equipment, you need to define maintenance rules for the system to use when processing the schedule. Maintenance rules define when preventive maintenance will be scheduled and provides default values to work orders.

Understanding Maintenance Rules

To use the preventive and condition-based maintenance features in JD Edwards EnterpriseOne Plant and Equipment Management, you must set up maintenance rules. Maintenance rules determine when the system schedules preventive maintenance tasks. In addition, maintenance rules can:

- Determine the status of scheduled tasks.

- Assign default values for the assigned work order.

- Assign default values for the business unit to be charged for the maintenance task.

- Determine when maintenance is due, based on threshold percentages.

For example, assume you have defined a service type for equipment lubrication that has a 100-hour maintenance interval. Also assume that you have defined maintenance rules for that service type which direct the system to assign a maintenance status of 50 (Maintenance Due) whenever 100 hours have elapsed. After 100 hours have elapsed and you

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update the PM schedule status, the system automatically assigns a maintenance status of 50 to the PM for equipment lubrication.

In addition to assigning a maintenance status to PMs, you use maintenance rules to:

- Define the threshold percentage when maintenance is due.

- Determine the assigned work order status, type, and priority if you use model work orders.

- Specify the status of associated service types that might already be scheduled, and combine work orders for associated service types to the work order for the primary service type.

- Determine default location from Branch Plant, Customer, and Site.

- Determine the assigned work order document type, order type, and priority if you use model work orders.

- Determine if assigned work order is added to the crew schedule or unscheduled backlog when created.

How the System Applies Maintenance Rules

The system searches for rules to apply to a maintenance task by using this sequence:

1. Searches for and applies a rule for which both an equipment number and a service type are assigned.
2. Searches for and applies a rule for which an equipment number but no service type is assigned.
3. Searches for and applies a rule for which a service type but no equipment number is assigned.
4. Applies the global default rule for which no equipment number or service type is assigned.

At a minimum, you must set up a global default maintenance rule with a blank equipment number and a blank service type. For any equipment with maintenance rules that must deviate from the global default rule, you can create specific rules that include the equipment number and service type. You can also set up default rules by:

- Equipment number with no service type.

- Service type with no equipment number.

How the System Calculates Projected Start Dates

The Maintenance Rules program (P1393) includes these fields on Maintenance Rules (W1393A), which relate to calculating start dates for work orders:

- Projected Start Date Method

- Sampling Amount

- Date - Projected From

Use the Projected Start Date Method field to specify how the system calculates the new start date for work orders. Methods are:

- Sampling Days method

  This method uses the number of days value that is entered in the Sampling Amount field to retrieve past F0911 table transactions; the default value is **365** days. This method also uses the date in the Projected Date - From field; the default value is the **Last Completed Date.**

  The system determines the change in meter readings based on the earliest and latest readings in the Sampling Days time period. A daily average is calculated by taking the change in meter readings and dividing this number by the number of days between the earliest and latest meter transactions in the date range.

  To project the start date, the system uses the daily average to calculate how many days remain until maintenance is due.

- Sampling Readings method

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This method uses the number of readings value that is entered in the Sampling Amount field to retrieve past F0911 table transactions; the default value is **5** meter readings. This method also uses the date in the Projected Date - From field; the default value is the **Last Completed Date.**

The system determines the number of days between the earlier and latest meter readings. A daily average is calculated by taking the number of readings divided by the number of days.

To project the start date, the system uses the daily average to calculate how many days remain until maintenance is due.

- Percent Due method

  This method uses the percent due of the preventive maintenance schedule and determines how many days it took to get to that point. The system calculates this percentage by taking the current meter reading and subtracting it from the last completed meter reading. The result is then divided by the service interval to obtain the percentage.

  To project the start date, the system calculates the remaining days by using the remaining percent and determining how many days it takes to reach 100 percent.

Use the Sampling Amount field for both the Sampling Days method and the Sampling Readings method to specify how many days or readings the system looks back in the Account Ledger when calculating new start dates for work orders.

Use the Date - Projected From field to specify the date that the system uses in projecting start dates. You can select either the Last Completed Date or the Through Date.

Prerequisites

Before you complete the tasks in this section:

- Set up these user-defined codes (UDCs):

  - Service Types (12/ST).
  - Maintenance Status (12/MS).
  - Work Order Document Type (00/DT).
  - Work Order/ECO Type (00/TY).
  - Work Order Priority (00/PR).
  - Work Order Status (00/SS).

- On the Edit tab of the processing options for Update PM Schedule Status (R12807), set these processing options:

  - Project the WO and PM Start Date: set to project start dates.
  - Past Projected Dates: set to allow or not allow dates in the past.

Form Used to Set Up Preventive Maintenance Schedule Information

Form Name	FormID	Navigation	Usage
Maintenance Rules	W1393A	Maintenance Setup (G1345), Maintenance Rules	Set up maintenance rules. Maintenance rules determine when the system schedules preventive maintenance tasks.

Setting Up Maintenance Rules

Access the Maintenance Rules form.

To set up maintenance rules:

1. In an empty row, complete these PM-related fields in the detail area:

   - Asset Number
   - Service Type
   - Thru %
   - PM Status

2. Complete these work order-related fields:

   - WO Document Type (work order document type)
   - WO Type (work order type)
   - WO Status (work order status)
   - WO Priority (work order priority)
   - WO Desc. (work order description)
   - WO BU (work order business unit)
   - App Typ (application type)
   - WO BP (work order branch plant)
   - WO Customer (work order customer)
   - WO Site (work order site)
   - Crew Schedule

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3. Complete these associated PM fields, if applicable:
    o Assoc. From (associated from)
    o Assoc. To (associated to)
4. Complete these fields that are related to projecting start dates:
    o Projected Start Date Method
    o Sampling Amount
    o Date - Projected From
5. Click OK.

Service Type

Enter a user-defined code that describes the preventive maintenance service to be performed or the service type for the work order.

Examples of codes include **CLUTCH** for adjust clutch, **OIL** for change oil, and **10H** for 10 hour service.

Thru %

Enter a percentage measure that indicates how soon a piece of equipment needs maintenance.

This percentage is based on the greater of the actual date, miles, hours, or fuel consumption. A percentage of 090 indicates that the piece of equipment is almost due for maintenance. A percentage greater than 100 indicates that maintenance is past due.

The system uses this percentage to determine when to initiate the maintenance schedule. If the maintenance schedule is greater than or equal to the threshold percent, the schedule becomes due.

Miles, hours, and fuel are only examples of statistical units. You can define other statistical units that are appropriate to the organization within the AAIs for JD Edwards EnterpriseOne Plant and Equipment Management.

> **Note:** The threshold percent field is not used for condition-based schedules. Condition-based schedules are initiated only by their alert-level value.

PM Status

Enter a value from UDC 12/MS (Maintenance Status) that indicates the maintenance status of a piece of equipment, such as **50** for maintenance due or **60** for waiting for parts.

> **Note:** Status code **98** is reserved for canceled maintenance. Status code **99** is reserved for completed maintenance. Status code **01** (default) is reserved for initial maintenance setup.

WO Type

Enter a value from UDC 00/DT (Document Type) that indicates the type of work order such as maintenance, manufacturing, and so forth.

You can use work order document type as a selection criterion for work order approvals.

WO Status

Enter a value from UDC 00/SS (Work Order Status) that describes the status of a work order.

Use this field to indicate which status the system assigns when you create a work order for preventive maintenance.

> **Note:** The system uses this status only when work order activity rules do not exist for the combination of the document type (DCTO) and the work order type (TYPS) for the new work order.

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WO Priority

Enter a value from UDC 00/PR (Work Order Priority) that indicates the relative priority of a work order or engineering change order in relation to other orders.

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.

WO BU

Enter a code that specifies which business unit the system charges for assigned work orders for scheduled maintenance. Values are:

1: Charge the charge-to business unit from the model work order.

2: Charge the responsible business unit from the F1201 table.

3: Charge the location business unit from the Asset Master File table.

4: Charge the responsible business unit as defined in the F17001 table.

WO BP

Enter a code that specifies which branch plant the system uses for assigned work orders for scheduled maintenance. Values are:

Blank: Use the branch plant from the model work order.

1: Use the branch plant from the equipment.

> **Note:** If you select option **1,** and the branch plant is not defined on the equipment record, the system will use the branch plant from the model work order.

Default Customer

Enter a code that specifies which customer the system uses for assigned work orders for scheduled maintenance. Values are:

Blank: Use the customer from the model work order.

1: Use the customer from the equipment.

Default Site

Enter a code that specifies which site the system uses to assigned work orders for scheduled maintenance. Values are:

Blank: Use the site from the model work order.

1: Use the site from the equipment.

Crew Schedule

Enter a **1** in this field if you wish to have the system attempt to create a crew schedule when PM work orders are generated.

Blank: PM generated work orders will be added to the backlog of unscheduled work.

> **Note:** Since Maintenance Rules are also used as part of the PM Projection generation process, this field is used to control whether PM Projection records display on the crew scheduling workbench.

Assoc. From

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Enter the first value in a range of codes from UDC 12/MS (Maintenance Status) that specifies which associated service types that are already scheduled for maintenance should be grouped together.

These service types are grouped with the primary service type and assigned to the same work order. For example, if a monthly vehicle inspection and an annual vehicle inspection occur in the same month, the system groups the monthly inspection (associated service type) with the annual inspection (primary service type) and assigns it to the same work order.

Projected Start Date Method

Enter a value from UDC 13/PM (Projection Method) that specifies the method that the system uses to calculate the projected start date for a work order.

Sampling Amount

Enter the number of days or transactions that the system uses for a sample of past meter readings from the F0911 table.

> **CAUTION:** Using a large number in this field might negatively affect the system performance.

Date - Projected From

Enter a value from UDC 13/PD (Projection from Date) that specifies the date that the system uses to calculate the projected start date for a new work order.

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8 Setting Up Work Orders

Understanding Work Orders

Before you can use the work order features in JD Edwards EnterpriseOne Capital Asset Management (CAM), you must provide the system with information that is necessary to configure work orders for the business needs. For example, you can set up different managers and supervisors for work orders that are based on the work order category codes. When you assign category codes to a new work order, the system automatically assigns the correct managers and supervisors.

Due to system integration features, you access other JD Edwards EnterpriseOne systems to complete certain setup tasks. The guidelines for completing these tasks are discussed as needed in the appropriate sections.

Work Order Activity Rules

You can set up rules that specify the statuses or steps through which a work order must pass. In addition, you can specify that certain statuses initiate events in the work order life cycle, such as:

- Updating the maintenance status.

- Locking the work order.

- Completing the Subledger Inactive Code field for the work order.

See *"Setting Up the Work Order System" in the   JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

Work Order Approvals

You can specify the individuals who are responsible for approving work orders at various points in the work order life cycle. Use approval routing to create various approval routes.

See *"Setting Up the Work Order System" in the   JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

Standard Parts Lists and Work Order Instructions

You can set up standard parts lists for work orders. You use a standard parts list when the maintenance task for which the work order applies is routine and repetitive, and for which you have advance knowledge of the parts requirements.

You can set up standard work order instructions for a work order. Work order instructions specify the sequence of operations that is required to complete a work order, as well as the work centers responsible for each operation. You use standard work order instructions when the maintenance task for which the work order applies is routine and repetitive, and when you have advance knowledge of the labor requirements.

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To use standard work order instructions, you must set up work center information and information about the sequence of operations.

> **Note:**
> - *"Setting Up the Inventory Management System" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide .*
> - *"Activity Rules for Work Orders" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide .*
> - *"Defining Approval Routes" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide .*
> - *"Setting Up User Profiles" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide .*

Mobile Applications for Creating Service Orders

The following mobile applications are available, and can be used to create service orders on a mobile device:

- Service WO (Tablet)

This application requires system administrator configuration before it is available to individual users. Contact your system administrator to determine whether this application is available for use.

Additionally, see the topic *Create Service Orders Mobile Application* in the *JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide* .

Understanding Work Order AAIs

You must set up work order AAI 1784.

AAI 1784 identifies the account that the system charges when you create a purchase order for parts on the work order parts list

Understanding Record Types

You use record types to organize and track detailed information about a work order, such as its full description, final disposition, and so on. You then can track the information according to the record type to which you assigned the information. For example, you can organize information such as original task description, tools needed, and safety requirements.

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You must set up these record types for JD Edwards EnterpriseOne Plant and Equipment Management:

- Maintenance routes.

- Associated preventive maintenance (PMs) schedules.

The record type that you set up for maintenance routes should match the record type that you set up in equipment constants.

The record type that you set up for associated PMs must be assigned to record type Z. This record type stores all of the associated service types to be performed on a work order.

> **Note:**
>
> - *"Setting Up Record Type Formats" in the   JD Edwards EnterpriseOne Applications Work Orders Implementation Guide   .*

Understanding Supply and Demand Inclusion Rules

To balance the parts inventory with the demand for parts that is created by maintenance work orders, you must set up supply and demand inclusion rules. You use supply and demand inclusion rules to specify the documents that create a supply for parts, such as purchase requests, and the documents that create a demand for parts, such as PM work orders, corrective work orders, and so on. In addition, you specify the statuses at which the various documents create supplies or demands.

This table provides information about programs that use supply and demand inclusion rules:

Program	Usage
Material Requirements Planning (MRP)	You can set up and apply different versions of the supply and demand inclusion rules, depending on the type of material plan that you run. For example, you can set up one version of the rules to apply to a long-range material plan and another version to apply to a short-range material plan.
Capacity Requirements Planning (CRP)	You can set up and apply different versions of the supply and demand inclusion rules, depending on the type of capacity plan you run. For example, you can set up one version of the rules to apply to a long-range capacity plan and another version to apply to a short-range capacity plan.
Supply/Demand Inquiry	Based on the version of the supply and demand inclusion rules you select, all of the documents that create a supply or demand for a particular part appear on Supply/Demand Inquiry. You can then access documents and make revisions to balance the supply with the demand.
Resource Assignments	You can set up and apply different versions of the supply and demand inclusion rules, depending on the work order and operation status. You can use the rules to display or exclude resource assignments from the availability and detail inquiries. For example, you can exclude the work order completed status since those assignments are no longer current.

In JD Edwards EnterpriseOne Plant and Equipment Management, these document types create a supply for parts:

- Purchase requests

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- Purchase orders

- Blanket purchase orders

In JD Edwards EnterpriseOne Plant and Equipment Management, these document types create a demand for parts:

- System-generated maintenance work orders, such as PM work orders.

- Corrective maintenance work orders.

After you set up supply and demand inclusion rules, you can use the information that the system provides to balance the supply and demand for parts. For example, if demand is greater than supply at a given point, you can expedite purchase orders or postpone work orders.

When you review a version of the supply and demand inclusion rules, the system displays all of the document types and related statuses that are available. You select the document types and document statuses that you want to include in the version. Document types for which inclusion rules currently apply appear in a contrasting color. For review purposes, you can specify that the system only display document types for which inclusion rules currently apply.

Set processing options to include the work order document types that you have defined.

> **Note:**
>
> - *"Setting Up Supply and Demand Inclusion Rules" in the JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide .*

Setting Up Constants for Work Orders

This section discusses how to set up work order constants.

Form Used to Set Up Constants for Work Orders

Form Name	FormID	Navigation	Usage
S/WM System Constants Revisions	W17001C	Service & Warranty Setup (G1740), Service & Warranty Constants	Set up work order constants. Define default information that applies to the entire system. Constants control the types of information that you track and the rules that the system uses to perform certain calculations.

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Setting Up Work Order Constants

Access the S/WM System Constants Revisions form.

Select the Work Orders tab.

Responsible BU Location
Enter a code that specifies from which tables the system retrieves the responsible business unit to which work orders should be billed. The default value is **1**. Values are:

1: Item Master-Service/Warranty Extension table (F4117) and the Item Branch Master-Service/Warranty Extension table (F41171)

2: Product Family/Model Master table (F1790)

3: Equipment Master Extension table (F1217)

4: Address Book Master table (F0101)

5: S/WM Line Type Constants table (F1793)

6: S/WM Customer Number (F1797)

When adding a work order, the default value for the business unit is based on the constant value. For example, if the default value of the business unit is based on the equipment number, the system retrieves the value for the Responsible Business Unit from the Equipment Master Extension table (F1217).

Service Order Entitlement Trigger
Enter a value from user-defined code (UDC) table 17/ET (Entitlement Check Trigger) that specifies which field should initiate entitlement checking when you enter a work order.

Who's Who Required
Enter an option that specifies whether the work order customer must have Who's Who records.

If this option is enabled, you cannot add the work order unless the work order customer and all additional contacts reside in the Address Book - Who's Who table (F0111).

You must select a customer number from the window. The system returns the short identifier that is associated with the Who's Who record.

Use Solution Advisor for Equipment Work Orders
Select this option only when it applies to the CAM - Manage Equipment Work Orders program (P13714). P17714 does not reference this constant.

Click this option to specify whether the system uses JD Edwards EnterpriseOne Solution Advisor to search for and maintain solutions to problems for equipment work orders. If you do not enable this option, the system uses Failure Analysis.

Use Solution Advisor for Service Work Orders
Select this option only when it applies to the Service Management Workbench program (P90CD020). P17714 does not reference this constant.

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Setting Up Next Numbers for Work Orders

You set up the beginning number for work orders to enable the system to automatically assign unique numbers for each work order that is generated by you or the system. The system stores next numbers for work orders in the JD Edwards EnterpriseOne Work Orders/Service Billing system (system 48). The system generates next numbers from the Next Numbers - Automatic table (F0002). This section discusses how to set up next numbers for work order.

Form Used to Set Up Next Numbers for Work Orders

Form Name	FormID	Navigation	Usage
Set Up Next Numbers by System	W0002C	Plant & Equipment Management Setup (G1341), Next Numbers Select the record for system 48 on the Work With Next Numbers form and click Select.	Set up work order next numbers.

Setting Up Work Order Next Numbers

Access the Set Up Next Numbers by System form.

Next Number

Enter the number that the system assigns next.

The system can use next numbers for voucher numbers, invoice numbers, journal entry numbers, employee numbers, address numbers, contract numbers, and sequential W-2s. You must use the next number types already established unless you provide custom programming.

> **Note:**
>
> JD Edwards EnterpriseOne Plant and Equipment Management users need to set up only the Work Order Number. You should not use blank as a next number value.
>
> For the ECO Number, select the Check Digit Used option.

> **Note:** You should not use blank as a next number value.

Setting Up Work Order History

This section provides an overview of work order history and discusses how to setting processing options for Work With Work Order History (P17715).

Understanding Work Order History

Review work order history to track work order status information by customer and by equipment. You can also set up the history so that a work order is not created for referenced equipment. These programs control the display of links within the work order entry program to indicate previous customer or product cases.

Default dates and status codes are defined by processing options. You can override default information by entering new dates and statuses. Links appear at the top of the work order entry forms to alert you to existing customer or product history. Click the links to see detailed information.

When you set processing options for the Work With Work Order History program (P17715), you can display a link to indicate that previous work orders are associated with a piece of equipment or with a customer.

The values that you enter determine whether the system displays a link when existing work orders are associated with the inventory item number, product model, equipment number, or customer number, if applicable.

You must first enter the status of the work orders that define the selection range criteria. Then define the number of days of history that you want to view. For example, if you enter 30 days, the program displays the product or customer link if a work order falls within the status range and was entered 30 days less than the system date.

Form Used to Set Up Work Order History

Form Name	FormID	Navigation	Usage
Work With Work Order History	W17715A	Work Order Setup (G1742), Work Order History - Equipment. Work Order Setup (G1742), Work Order History - Customer.	Review work order history.

Setting Processing Options for the Work With Work Order History Program (P17715)

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

Process

Although processing options are set up during implementation, you can change processing options each time you run a program.

1. Beginning Status for History

Specify the beginning status in the range of work order statuses that the system displays.

2. Ending Status for History

Specify the ending status in the range of work order statuses that the system displays.

3. Number of Days of History to Display

Specify the range of work order creation dates to display.

The system uses this option to calculate the value in the Creation Date From field.

4. Work Order Type

Enter a value from UDC 00/TY (Work Order/ECO Type) that indicates the type of work orders to display.

5. Actual Finish Date From

Specify the From repair date for the range of work order repair dates.

6. Actual Finish Date Through

Specify the To repair date for the range of work order repair dates.

Setting Up Default Locations and Printers

Many of the forms within JD Edwards EnterpriseOne Foundation - Work Order require you to specify a location, such as a branch or plant, to which you are assigned. You can set up default locations for each person in the organization who uses the JD Edwards EnterpriseOne Foundation - Work Order system. You also can assign a default print queue to each person. When a person prints a work order, the system uses the default print queue that you set up unless the person specifies otherwise.

This section provides an overview of default locations and printers and discusses how to:

- Set up default locations.

- Set up default print queues.

Understanding Default Locations and Printers

Many of the forms within the JD Edwards EnterpriseOne Work Order Processing system require that you specify a location, such as a branch or plant, to which you are assigned. You can set up default locations for each person in the organization who uses JD Edwards EnterpriseOne Work Order Processing. A default location is the branch/plant that is assigned to the user ID or terminal ID. If you do not set up a default location for the user ID or terminal ID, you must enter a location manually.

You can also assign a default print queue to each person who uses JD Edwards EnterpriseOne Work Order Processing. When you print a work order, the system uses the default print queue that you set up unless you specify otherwise. If you do not assign a default print queue, the system uses either the print queue that is assigned in the particular version for the Work Order Print program or the print queue that is assigned to the user profile.

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Forms Used to Set Up Default Locations and Printers

Form Name	FormID	Navigation	Usage
Default Location & Approval	W400951B	Inventory Setup (G4141), Default Location & Printers Click Add on the Work With Default Location & Printers form.	Set up default locations.
Default Print Queues	W40096A	Select Print Queues from the Form menu on the Default Location & Approval form.	Set up default print queues.

Setting Up Default Locations

Access the Default Location & Approval form.

Default Location & Approval

✓ ✗ ⊞ Form ⚙ Tools

Terminal/User ID		
Branch/Plant	M30	Eastern Manufacturing Center
Blend Business Unit		
Grower Cost Center		
Approval Route Code		

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Setting Up Default Print Queues

Access the Default Print Queues form.

On Default Print Queues, complete the Output Queue field for each document for which you want to assign a default print queue.

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9 Setting Up Parts and Labor Planning

Understanding General Planning Information

Before the system can generate material and labor plans and create planning messages, you must define general planning information for each branch or plant in the organization. General planning information determines how the system commits inventory to the branch or plant, which work days to include when you generate a material or capacity plan, how the system processes changes to standard parts lists, and so on.

> **Note:** Before you can use maintenance planning features in JD Edwards EnterpriseOne Plant and Equipment Management, you need to set up information that the system uses to process material plans and labor plans. For example, you must set up information to determine how the system commits inventory to a branch and how the system calculates the availability of parts and labor resources.

Work Day Calendar Setup

You must set up work day calendars for each maintenance branch or plant. You use the calendar to specify which days are work days, holidays, and so on. You need to set up a work day calendar for every month for which you want to generate parts and labor plans. The system uses work day calendar information to plan and schedule labor resources, based on the workdays that you specify. You should set up calendars six months to a year at a time.

When you initially set up a work day calendar, the system automatically specifies all week days as work days, and all Saturdays and Sundays as nonwork days. You can accept these values or change the days to suit the business needs.

> **Note:** Shift codes are not applicable to maintenance planning.

See *"Adding a Work Day Calendar" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .

Understanding UDCs for Resource Planning

Before you can use the labor planning features in JD Edwards EnterpriseOne Plant and Equipment Management, you must set up these UDCs:

- CRP display
- Message types

The system uses these codes to calculate and display labor availability when you generate a labor plan. The system also uses these codes to determine which action messages appear when it detects a conflict between the availability of labor resources and demand for labor resources.

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CRP Display (33/MM)

You must set up the CRP Display table (33/MM) with the codes that you want to appear on Capacity Load. The system provides several predefined codes, such as:

- **10:** Released Load
- **40:** Load Versus Capacity
- **80:** Available Capacity
- **90:** Accumulated Available Capacity

You can use these codes or modify them to meet the specific calculation or display purposes.

Message Types (33/MT)

You use message type codes (33/MT) to define the action messages that you want to appear when the system notifies you of load and capacity conflicts. For example, you can define messages that indicate an over-capacity condition, an under-capacity condition, and so on.

> **Note:**
>
> - *JD Edwards EnterpriseOne Tools Foundation Guide* .

Understanding Supply and Demand Inclusion Rules

To balance the parts inventory with the demand for parts that is created by maintenance work orders, you must set up supply and demand inclusion rules. You use supply and demand inclusion rules to specify the documents that create a supply for parts, such as purchase requests, and the documents that create a demand for parts, such as PM work orders, corrective work orders, and so on. In addition, you specify the statuses at which the various documents create supplies or demands.

This table provides information about programs that use supply and demand inclusion rules:

Program	Usage
Materials Requirements Planning (MRP)	You can set up and apply different versions of the supply and demand inclusion rules, depending on the type of material plan that you run. For example, you can set up one version of the rules to apply to a long-range material plan and another version to apply to a short-range material plan.
Capacity Requirements Planning (CRP)	You can set up and apply different versions of the supply and demand inclusion rules, depending on the type of capacity plan you run. For example, you can set up one version of the rules to apply to a long-range capacity plan and another version to apply to a short-range capacity plan.
Supply/Demand Inquiry	Based on the version of the supply and demand inclusion rules you select, all of the documents that create a supply or demand for a particular part appear on Supply/Demand Inquiry. You can then access documents and make revisions to balance the supply with the demand.

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Program	Usage
Resource Assignments	You can set up and apply different versions of the supply and demand inclusion rules, depending on the work order and operation status. You can use the rules to display or exclude resource assignments from the availability and detail inquiries. For example, you can exclude the work order completed status since those assignments are no longer current.

In JD Edwards EnterpriseOne Plant and Equipment Management, these document types create a supply for parts:

- Purchase requests

- Purchase orders

- Blanket purchase orders

In JD Edwards EnterpriseOne Plant and Equipment Management, these document types create a demand for parts:

- System-generated maintenance work orders, such as PM work orders.

- Corrective maintenance work orders.

After you set up supply and demand inclusion rules, you can use the information that the system provides to balance the supply and demand for parts. For example, if demand is greater than supply at a given point, you can expedite purchase orders or postpone work orders.

When you review a version of the supply and demand inclusion rules, the system displays all of the document types and related statuses that are available. You select the document types and document statuses that you want to include in the version. Document types for which inclusion rules currently apply appear in a contrasting color. For review purposes, you can specify that the system only display document types for which inclusion rules currently apply.

Set processing options to include the work order document types that you have defined.

> **Note:**
>
> - *"Setting Up Supply and Demand Inclusion Rules" in the   JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide .*

Setting Up Manufacturing Constants

You must define material and resource planning values for each branch or plant. For example, you can specify rules that govern how the system commits and routes inventory. You can also specify that the system should log changes to standard parts lists if you need to track the changes. You can also define the number of hours per day that each branch or plant operates. The system uses this information to determine the maximum workload for each work center in a branch or plant.

> **Note:** JD Edwards EnterpriseOne Plant and Equipment Management shares planning constants with other manufacturing systems. If you use manufacturing systems, you should set up separate constants for maintenance branch/plants and manufacturing branch/plants.

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Forms Used to Set Up the Manufacturing Constants

Form Name	FormID	Navigation	Usage
Work with Manufacturing Constants	W3009A	Planning Setup (G1346), Manufacturing Constants	Review and select manufacturing constants records.
Manufacturing Constants Revision	W3009B	Click Add on the Work with Manufacturing Constants form.	Set up manufacturing constants.

Setting Up Manufacturing Constants

Access the Manufacturing Constants Revision form.

Log Bill of Material

Enter a code that determines whether changes to the bill of material are recorded in the Bill of Material Change File table (F3011).

When you log bill of material changes, the system saves the old bill of material and the new, changed bill of material. To record changes to the bill of material, select the Log Bill of Material option in the BOM/Routing Options group box.

On-Line BOM Validation (online bill of material validation)

Enter an option that determines whether the system performs an online component or parent validation and low-level code assignment when you revise a bill of material.

You should validate items online unless the bills of material are extremely large. If you select not to validate items online, you must validate the items in batch. Run the Integrity Analysis program (P30601) after updates to the bill of material and before you run the Item Cost Component - Frozen Update program (R30835) or perform a DRP/MPS/MRP generation (R3482).

To specify that the system validates items online, select the On-Line BOM Validation option in the BOM/Routing Options group box. If you do not select the On-Line BOM Validation option, the system does not validate items online.

Commitment Control

Select the Commitment Control tab.

The inventory commitment controls on this tab affect material planning and commitments on the work order parts list. Commitment Control options specify whether commitments cross branch plant boundaries. Hard/Soft Commit options specify when hard or soft commitment occurs.

Commitment Control

Select an option to specify how the system commits inventory to a work order and the inventory location to which commitments are made. The system activates this field only when you create hard commitments.

Options are:

- Primary Location. Make commitments to the primary location in the branch/plant where the work order originates.

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- Split-Cross Branch Boundaries. Split the parts list and commitments to fill any component shortages. The system can cross branch boundaries to fill requirements. In this case, the system uses the next alphabetical branch/plant listed in the table that occurs after the branch/plant on the work order header.

  For example, for the branch/plants CAL, CHI, CLE, and HOU: If the system starts committing inventory at branch/plant CHI, it accesses CLE as the next branch/plant. If inventory is low in all locations, the system makes the remaining commitments to the primary location of the branch/plant on the work order header.

- Split-Do Not Cross Branch Boundaries. This option is similar to Split-Cross Branch Boundaries, but the system cannot cross branch boundaries.

Note: When you set the Commitment Method field in the Item Branch/Plant table to **2** or **3** (lot number or expiration date control), you must use the Split-Do Not Cross Branch Boundaries option.

Hard/Soft Commit

Select an option to specify how the JD Edwards EnterpriseOne Shop Floor Management system commits inventory. Options are:

- Hard commitment at creation of parts list. The system performs a hard commitment at the creation of the parts list. The hard commitment remains in effect until inventory is relieved.
- Soft commitment, then changed to hard commitment when printing. The system performs a soft commitment at the creation of the parts list. The system then changes the commitment to a hard commitment during the pick list print process (P13415) for the work order. The hard commitment remains in effect until inventory is relieved.
- Soft commitment at creation of parts list. The system performs a soft commitment at creation of the parts list. The soft commitment remains in effect until inventory is relieved.

When you set the Commitment Method field in the Branch/Plant Constants form to **2** or **3**, you must use either hard commitment at creation of parts list, or soft commitment then hard commitment when printing, because a hard commitment must be performed.

If you want to identify substitute items when a shortage occurs, you must select the hard commitment at creation of parts list option.

When you select either Soft, Hard when printing, or Soft at creation of Parts List, any line item in the parts list may be hard-committed prior to printing or relieving the inventory.

Setting Up UDCs for Parts Planning

This section provides an overview of UDCs for parts planning and describes how to:

- Set up quantity types.
- Set up the MRP calculation display codes.

Understanding Setting Up UDCs for Parts Planning

Before you can generate and review a parts plan, you must set up information that the system uses to process the plan. For example, you must set up a table of user-defined quantity types that the system uses to calculate and display the supply and demand of parts. You must also specify the action messages that you want to appear when the system detects a conflict between the availability and the demand for a part.

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In addition, you can set up different versions of the supply and demand inclusion rules to accommodate different types of parts plans that you want to generate. For example, you can generate a long-range parts plan and a short-range parts plan. You use supply and demand inclusion rules to specify the document types that you want the system to include when it processes each plan.

Before you can use the parts planning features, you must set up these UDCs:

- Quantity Type (34/QT)
- MRP calculation display (34/MM)
- MRP action messages (34/MT)

The system uses these codes to calculate and display the availability of parts. The system also uses these codes to determine which action messages to display when it detects a conflict between the availability and the demand for a part.

Quantity Types Codes

Quantity types are values in UDC 34/QT that represent the availability of parts. JD Edwards EnterpriseOne CAM provides several predefined codes, including:

- + Beginning available (unadjusted)
- + Beginning available
- + Purchase orders
- - Lot Expired
- - Firm work orders
- = Ending available (unadjusted)

The system uses codes that have unadjusted values to calculate part availability with the assumption that any outstanding action messages are not be implemented by the responsible planner. The system uses all of the other codes to calculate the availability of parts with the assumption that the planner implements planning messages.

> **Note:** The table for quantity types is shared with other manufacturing systems. Under no circumstances should you delete this table. Values within this table have special meaning to the system, but you can change the description fields. You should leave this table unaltered.

MRP Calculation Display Codes

You must set up the MRP Calculation Display table (34/MM) with the quantity type codes that you want the system to consider when it calculates the availability of a part. You can revise the codes in this table to meet the specific calculation or display purposes.

For example, you can set up a table to specify that the system:

- Use the beginning available quantity for a part.
- Add quantities from existing purchasing orders.
- Subtract quantities from maintenance work orders.
- Provide the ending available amount

You can use processing options for the User-Defined Codes program (P0004A) to specify which version of the MRP calculation display table that the system uses. The maintenance material planning version of the MRP calculation display table appears unless you specify otherwise.

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MRP Action Message Codes

You must define the action messages that you want to appear when the system notifies you of parts planning conflicts. For example, depending on the severity of a parts shortage, you can direct the system to provide messages to place an order for a part, expedite an existing order, increase the quantity of an existing order, and so on.

The system stores MRP action message codes in UDC 34/MT. You can change the description of the codes to meet the business needs.

> **Note:**
>
> - *JD Edwards EnterpriseOne Tools Foundation Guide* .

Forms Used to Set Up Parts Planning Codes

Form Name	FormID	Navigation	Usage
Work With User-Defined Codes	W0004AA	Planning Setup (G1346), Quantity Types	Set up quantity types.
Work With User-Defined Codes	W0004AA	Planning Setup (G1346), MRP Calculation Display	Set up MRP calculation display codes.
Work With User-Defined Codes	W0004AA	Planning Setup (G1346), MPS/MRP Action Messages	Set up MRP action message codes.

Setting Up Quantity Types

Access the Work With User-Defined Codes form for UDC 34/QT.

Setting Up the MRP Calculation Display Codes

Access the Work With User-Defined Codes form for UDC 34/MM.

Setting Up Resource Planning

This section provides overviews of resource planning and resource units.

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Understanding Resource Planning

Before you can generate and review a labor plan, you must set up information that the system uses to process the plan. For example, you must set up the work centers that are responsible for maintenance and specify the number of employees in each maintenance work center. You must also set up additional UDCs, such as the codes that the system uses to calculate the availability of labor resources.

In addition, you can set up different versions of the supply and demand inclusion rules to accommodate different types of labor plans that you want to generate. For example, you can generate a long-range labor plan and a short-range labor plan. You use supply and demand inclusion rules to specify the document types that you want the system to include when it processes each plan.

Understanding Resource Units

You must set up resource units to enable the system to calculate labor demands and labor costs for maintenance tasks. The system calculates resource units by multiplying the work hours per day by the number of employees in a work center. In JD Edwards EnterpriseOne Plant and Equipment Management, a work center usually represents the employees who perform maintenance work, although it can also represent a department or a machine. You must set up the work centers before the system can calculate resource units and labor costs.

In addition, you must establish standard labor rates. The system uses standard labor rates to calculate rate information on work order labor routings and on the work order Estimate to Actual Variance program.

Setting Up Work Centers and Work Center Rates

This section provides an overview of work centers and work center rates, lists a prerequisite, and discusses how to:

- Set up work centers.
- Set up work center rates.

Understanding Work Centers and Work Center Rates

You must provide the system with these types of information about each of the maintenance work centers:

- Basic information, such as work center names, crew sizes, job processing time, and so on.

- Grouping information, so that you can combine similar work centers for planning and reporting.

- Labor rate information.

  The work centers and labor rate information is required when entering labor detail steps on a work order, so it is required even if you are not planning to use the JD Edwards EnterpriseOne Capacity Planning applications.

  See *"Setting Processing Options for Work Center Revision (P3006)" in the   JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* .

Prerequisite

Before you complete the tasks in this section set up work day calendars for each branch or plant.

Forms Used to Set Up Work Centers and Work Center Rates

Form Name	FormID	Navigation	Usage
Work With Work Centers	W3006F	Planning Setup (G1346), Work Center Revision	Review and select work center records.
Work Center Master Revisions	W3006A	Click Add on the Work With Work Centers form.	Set up work centers.
Work With Work Center Rates	W3006B	Select Rates from the Form menu on the Work Center Master Revisions form.	Review and select the work center rate records.
(Release 9.2 Update) Work Center Rate – Mass Update	W3006MA	On Work With Work Centers, select a work center and click Rates-Mass Update from the Row menu. On Work With Work Centers, click Rates-Mass Update from Form menu. On Work With Work Center Rates, click Rates-Mass Update from Form menu. Product Costing (G3014), Work Center Rates – Mass Update	Update simulated rates for more than one work center at a time.
Work Center Rate Revisions	W3006C	Click Add on the Work With Work Center Rates form.	Set up work center rates.

Setting Up Work Centers

Access the Work Center Master Revisions form.

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Work Center Master Revisions

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| Work Center | R-A1 | Branch/Plant | M30 |

Work Center Master   Capacity & Shifts   Hours & Efficiency

Dispatch Group	R-A1		
Location - Issue			
Location Branch	M30	Calendar Name	
Work Center Type	2	Crew Size	
Pay Point	0	Number of Machines	
Prime Load	L	Number of Employees	
Critical W/C	N	Resource Offset	

Dispatch Group

Enter a category code used to group work centers within an overall business unit.

For example, you can use this code to group similar machines operating out of several work centers that report to one business unit.

Critical W/C (critical work center)

Enter a value from UDC 30/CR (Critical Work Center) that indicates whether the work center is critical or not critical when the system calculates capacity. Values are:

N: Not a critical work center.

1: A critical work center in calculating RRP only.

2: A critical work center in calculating RCCP and CRP.

3: A critical work center in calculating RRP, RCCP, and CRP. The system also displays Type 3 work centers when you select **Type 1** or **Type 2** in this field.

4: Not a capacity work center. The system does not include this work center in capacity planning.

Setting Up Work Center Rates

Access the Work Center Rate Revisions form.

(Release 9.2 Update) You can also access the Work Center Rates – Mass Update form to add or update more than one work center's rates at a time. You can manually add or update the records, or you can import the records from a csv file or clipboard to perform a mass update.

Cost Method
Enter a value from UDC 40/CM (Cost Method) that specifies the basis for calculating item costs.

Cost Method 07 - Standard Cost is used to specify the estimated unit cost for the work center resources.

Cost methods 01 through 19 are reserved and are not available for you to use.

Direct Labor
Specify a rate, in cost per person per hour, that the system uses with the Run Labor hours of the associated routing to calculate the standard run labor cost.

The estimated cost is entered in the Direct Labor simulated field, and needs to be updated to the Frozen cost using the Item Cost-Frozen Update batch (R30835) program.

Calculating Available Resource Units

This section provides an overview of the Work Center Resource Units Generation program and discusses how to:

- Run the Work Center Resource Units Generation program.

- Set processing options for the Work Center Resource Units Generation program (R3007G).

  Note: Calculating the available resource units is only required if you are planning to use the JD Edwards EnterpriseOne Capacity Requirements Planning programs to view the capacity load based on a PM forecast projection.

Understanding the Work Center Resource Units Generation Program

After you set up work centers and whenever you revise work center information, you must run the Work Center Resource Units Refresh program to calculate available resource units. You specify a time period and a branch or plant for which you want the system to calculate resource units. The system uses the Prime Load Code field on the Work Center Master Revisions form to determine how to calculate the resource units that a work center is capable of generating over a particular period of time. To calculate resource units for maintenance work centers, you typically use a prime load code of L for labor hours.

When you use a prime load code of L, the system calculates resource units using this information:

- Number of employees from Resource Revisions.

- Work hours per day from General Planning Constants.

> **Note:**
>
> - *"Determining Available Capacity" in the JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide* .

Running the Work Center Resource Units Generation Program

Select Planning Setup (G1346), Work Center Resource Units Generation.

Setting Processing Options for the Work Center Resource Units Generation Program (R3007G)

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

Defaults

Although processing options are set up during implementation, you can change processing options each time you run a program.

1. From Date

Specify the beginning date that the system uses to generate resource units.

Enter the beginning date or select a date from the calendar. The system generates resource units and refreshes them for the month in which the from date falls. For example, if the from date is January 10 and the through date is January 15 the system generates resource units for January. The system requires that you enter values for this processing option before you can run the generation.

2. Thru Date

Specify the ending date that the system uses to generate resource units.

Enter the ending date or select a date from the calendar. Resource units are generated, refreshed, or both, for the entire month. For example, if the from date is January 10 and the through date is January 15 the system generates resource units for January. The system requires that you to enter values for this processing option before you can run the generation.

3. Branch/Plant

Specify the branch/plant updated by the system in the Work Center Resource Units table when you generate resource units.

Enter the branch/plant or select a branch/plant from the Business Unit Master Search form. This processing option is required before you can run the generation.

Process

1. Shift Code,2. Shift 2 Code,3. Shift 3 Code,4. Shift 4 Code,5. Shift 5 Code, and 6. Shift 6 Code

Enter a value from UDC 06/SH (Shift Codes) that identifies the type of shift. For example, day, night, or graveyard.

These processing options specify the shift codes to be included in the resource unit generation. You can enter up to six different shift codes. Enter the code or select it from the Select User-Define Code form.

Blank: The system processes all valid shifts for the requested branch/plant.

10 Understanding the Equipment Master

Understanding Equipment Master Information

Equipment master information is the primary data that is associated with the equipment in the system; it is made up of many equipment masters. You create an equipment master for each piece of equipment in the system. The equipment master establishes basic information about a piece of equipment, such as:

- Identification numbers
- Description
- Category codes
- Account coding
- Dates
- Location
- Status

You must identify every piece of the equipment in the system before you can use the maintenance features of the software. After you create equipment masters for the equipment, you can use the information to:

- Search online for the status, location, and activity of equipment.
- Track historical, current, and planned physical locations for a piece of equipment.
- Relocate equipment.
- Keep detailed maintenance and project logs.
- Revise parent and component relationships.
- Revise equipment status.
- Bill jobs or business units for the use of the equipment.
- Account for quantities of equipment.

Note:

- *"Mapping Category Codes" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

- *"Understanding Identification Numbers" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

- *"Understanding Parent and Component Relationships" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

- *"Entering Permit and License Information" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

- *"Entering Supplemental Data" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .

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Understanding the Types of Equipment Identification Information

Equipment identification consists of four types of information:

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

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

Equipment Master

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

In JD Edwards EnterpriseOne Plant and Equipment Maintenance, you use the equipment master to:

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

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

Supplemental Information

You might need to store information about assets or equipment that is not included in the standard master tables. This additional information is called supplemental data, which you can use to further define the assets in the system. You can define as many types of supplemental data as you need for the company reporting.

You define and maintain supplemental data by asset or equipment class. For example, you might set up supplemental data for an asset class that includes motor graders. The data might include fuel capacities, horsepower, oil readings, and so on.

Specification Data

You can use specification data to record and track static information not included on the equipment master. For example, you might need to store nameplate data to which you can refer for correspondence regarding warranties.

Message Logs

You can use message logs to record and track short informational messages about assets or equipment that the master records and supplemental data forms cannot accommodate. For example, you can use message logs to:

- Indicate the status and condition of an asset.

- Record details about asset transfers or disposals.

- Log problems with a specific asset or piece of equipment.

- Note special procedures for scheduled or preventive maintenance tasks.

- Report actual maintenance.

You can associate message logs with equipment to record operator notes or maintenance problems. You can also attach tickler dates to maintenance-due messages so that they appear on specified dates or intervals, based on units such as miles or hours.

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11 Using Natural Resources Personas (Release 9.2 Update)

Understanding Natural Resources Personas

> **Note:** It is recommended that you use the UX One pages for the maintenance scheduler and maintenance technician roles instead of the natural resources persona components to manage the tasks related to maintenance schedule and equipment maintenance. See *UX One Role: Maintenance Scheduler* and *UX One Role: Maintenance Technician* in the *JD Edwards EnterpriseOne Applications UX One Roles User Guide* .

The natural resources industry develops and maintains large assets. This industry uses heavy equipment in the field. Keeping track of the status and maintenance of this equipment is a key task of the natural resources industry.

JD Edwards EnterpriseOne persona components enable users in specific roles to easily access real-time information to help them make instantaneous and informed decisions.

Persona components are available for these personas in the natural resources industry:

- Maintenance scheduler
- Maintenance technician

Users assigned to one of these personas can easily access data about equipment, work orders, costs, and other important data that resides in the JD Edwards EnterpriseOne software.

The following list describes the components of the natural resources personas:

- Active Content EnterpriseOne Page

  Active Content EnterpriseOne Pages are classic EnterpriseOne pages that include enhanced functionality provided by the Oracle JET (JavaScript Extension Toolkit) library. The Active Content EnterpriseOne Page for a persona is the first screen that end-users assigned to that persona see when they log on to the JD Edwards EnterpriseOne system. Active Content EnterpriseOne Pages are HTML files that can contain any of the following elements:

  - Specific information from frequently used applications along with links to the programs
  - Charts and graphs that display the results of frequently used queries
  - One View Watchlist results
  - Interactive process flows
  - URL links
  - Displays from and links to web pages

  See *"Composed EnterpriseOne Pages" in the JD Edwards EnterpriseOne Tools Using and Approving User Defined Objects Guide* .

  > **Note:** *Click here to view an OBE non-video tutorial of this feature.*

- CafeOne (Composite Application Framework) layouts

  CafeOne layouts are a user interface framework that enables you to work with content from multiple sources within a single browser window. The CafeOne layouts enable you to view on one page the information that you use the most. For example, you can set up a CafeOne page to display specific JD Edwards EnterpriseOne forms, graphics and charts, maps, and many other objects.

  See *"Working With Content and Layouts" in the JD Edwards EnterpriseOne Tools Composite Application Framework (CafeOne) User's Guide* .

- Queries

  Queries help you to locate specific information that you need. The delivered persona components include several queries that you can use to locate frequently required information.

  See *"Working With Search Criteria" in the JD Edwards EnterpriseOne Tools Foundation Guide* .

- One View Watchlists

  One View Watchlists represent collections of items that match user-defined criteria. They enable you to define the information for which you want a notification. For example, you might want to be alerted to outstanding tasks to do or thresholds that have been passed.

  You can use One View Watchlists only if you have One View Foundation set up on your system.

  See *"Creating One View Watchlists" in the JD Edwards EnterpriseOne Applications One View Watchlists Implemenation Guide* .

You can customize any of the delivered components to better suit your needs.

Prerequisites

Before you can use the components for a persona, your security administrator must:

1. Create a role, or use an existing role, for the personas.
2. Associate the persona components to the role, such as associating the queries and One View Watchlists to the role.
3. Assign you to the role to which the persona objects were associated.

See *"Provisioning User and Role Profiles"* and *"Managing Security for User Defined Objects"* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .
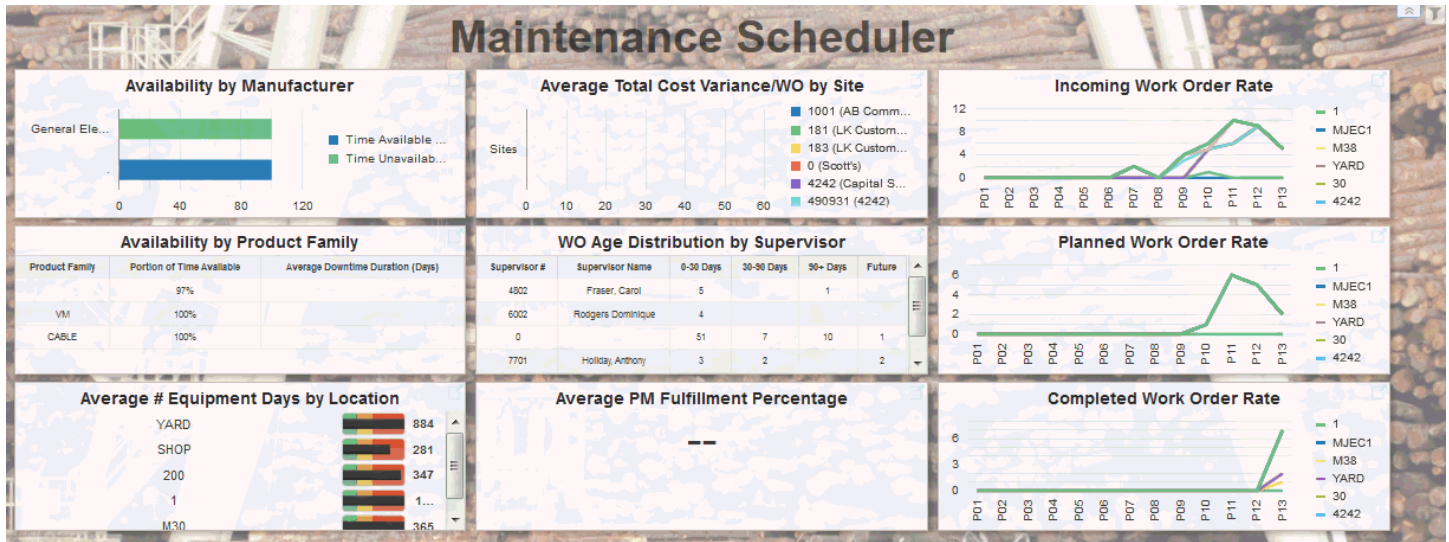
The Maintenance Scheduler Persona

The maintenance scheduler plans and creates work schedules for the maintenance technicians. The scheduler needs visibility across overdue, incoming, planned, and emergency work, as well as availability of technicians and tools.

The persona components available in JD Edwards EnterpriseOne strive to anticipate the needs of the maintenance scheduler by displaying the most frequently used forms and data.

Active Content EnterpriseOne Page for the Maintenance Scheduler Persona

The Active Content EnterpriseOne Page for the maintenance scheduler includes information organized in tiles. You can set up the data that you want to view in the tiles by using the query functionality.

The following table describes the components of the Active Content EnterpriseOne Page available for the maintenance scheduler:

Component	Component Type	Description
Availability by Manufacturer	Graph	This horizontal bar graph displays the percent of time available and unavailable for each equipment grouped by manufacturer. The data on this tile is based on the calculated grid columns for availability in the One View Equipment Status Inquiry program (P13400). See *"One View Equipment Status Inquiry (P13400)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
Availability by Product Family	Graph	This table displays the average portion of time available for equipment grouped by product family. Additionally, you can view the average downtime duration (in days) for each product family. The data on this tile is based on the calculated grid columns in the One View Equipment Status Inquiry program (P13400). See *"One View Equipment Status Inquiry (P13400)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
Average # Equipment Days by Location	Graph	This horizontal gauge chart displays, for each location, the average number of days that a piece of equipment spent time at the location. The green, yellow, and red color ranges indicate the thresholds for the number of days. The black bar in the middle of each horizontal gauge indicates the average number of days that the equipment spent at each location. The data on this tile is based on the calculated grid columns in the One View Equipment Location Inquiry program (P13230). See *"One View Equipment Location Inquiry (P13230)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
Average Total Cost Variance/WO by Site	Graph	This horizontal bar chart displays the total estimated and total actual costs for work orders (parts, labor, other costs) by site. The data on this tile is based on the calculated grid columns for costs in the One View Work Order Analysis program (P13560). See *"One View Work Order Analysis (P13560)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
WO Age Distribution by Supervisor	Graph	This table displays the number of work orders that are 0-30 days old, 30-90 days old, over 90 days old, or scheduled for the future for each maintenance supervisor.

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Component	Component Type	Description
		The data on this tile is based on the calculated grid columns in the One View Work Order Analysis program (P13560). See *"One View Work Order Analysis (P13560)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
Average PM Fulfillment Percentage	Graph	You can view the average percentage of actual completion of maintenance (PM) orders compared to their schedule. The graph displays the average percentage of all equipment and PM services. For example, if a truck was scheduled to have its tires rotated 4 times a year and only 3 rotations have been completed, the PM fulfillment percentage for that service is 75%. The data on this tile is based on the calculated grid columns in the One View PM Analysis program (P13570). See *"One View PM Analysis (P13570)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
Incoming Work Order Rate	Graph	This line graph displays the monthly rate at which work orders are created for each business unit for the past 13 months. The Order Date is used to determine when work orders were created. The data on this tile is based on the calculated grid columns in the One View Work Order Analysis program (P13560). See *"One View Work Order Analysis (P13560)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
Planned Work Order Rate	Graph	This line graph displays the monthly rate at which work orders are planned to start for each business unit for the past 13 months. The Planned Start Date is used to determine when work orders were planned to start. The data on this tile is based on the calculated grid columns in the One View Work Order Analysis program (P13560). See *"One View Work Order Analysis (P13560)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
Completed Work Order Rate	Graph	This line graph displays the monthly rate at which work orders are completed for each business unit for the past 13 months. The Actual Finish Date is used to determine when work orders were completed. The data on this tile is based on the calculated grid columns in the One View Work Order Analysis program (P13560).

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Component	Component Type	Description
		See *"One View Work Order Analysis (P13560)" in the JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

CafeOne Layout for the Maintenance Scheduler Persona

As a maintenance scheduler, you may want to know the current and backlog work orders for each asset. You may also want to know the location of the equipment that is pending maintenance. The Repairs layout that is available for the maintenance scheduler enables you to view all of that information in a single browser window on the Composite Application Framework.

The following table describes the content frames in the Repairs layout:

Note: The Repairs layout contains a placeholder for a map that you can set up to display the current location of the equipment that you select in the enabled EnterpriseOne form. When setting up the map, you can associate the map data to the Latitude and Longitude grid columns of the enabled Work with Equipment Master form. The placeholder includes a link to a video recording that illustrates how to create a dynamic map link.

Content	Content Type	Description
Work with Equipment Master Form (W1701A)	Enabled EnterpriseOne form	This is a fully functional EnterpriseOne form. Use this form to locate and review equipment master records.
View Work Orders Form (W48201EA)	Embedded EnterpriseOne Form	This is an embedded EnterpriseOne form from the Work Order Search program (P48201E). This form is dynamically linked to the enabled EnterpriseOne form. The Asset Number grid column in the enabled form is dynamically linked to the Equipment Number field in the embedded form. Therefore, the information in the embedded form changes when you change the value of the Asset Number column.
View Equipment Maintenance Records Form (W12071EA)	Embedded EnterpriseOne Form	This is an embedded EnterpriseOne form from the Equipment PM Backlog program (P48201E). This form is dynamically linked to the enabled EnterpriseOne form. The Asset Number grid column in the enabled form is dynamically linked to the Equipment Number field in the embedded form. Therefore, the information in the embedded form changes when you change the value of the Asset Number column.

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Queries for the Maintenance Scheduler Persona

The queries for the maintenance scheduler persona are associated with the Work With Work Orders (P48201), One View Equipment License/Permit Information (P13500), and Condition-Based Alerts Workbench (P1310) programs.

The following table lists and describes the queries available for the maintenance scheduler:

Query Name	Program	Criteria
Overdue PMs	Work With Work Orders (P48201)	• WO Type = 6 • Actual Finish Date = Blank
Open Emergency Work Orders	Work With Work Orders (P48201)	• WO Type = 5 • Actual Finish Date = Blank
Overdue Work Orders	Work With Work Orders (P48201)	• Actual Finish Date = Blank • Requested Finish Date < Today
CBM Alerts	Condition-Based Alerts Workbench (P1310)	• Alert Level = 2 • Alert Status = 1
CBM Warnings	Condition-Based Alerts Workbench (P1310)	• Alert Level = 1 • Alert Status = 1

One View Watchlists for the Maintenance Scheduler Persona

The One View Watchlists for the maintenance scheduler are based on queries associated with the Work With Work Orders (P48201), One View Equipment License/Permit Information (P13500), and Condition-Based Alerts Workbench (P1310) programs.

The following table lists and describes the One View Watchlists available for the maintenance scheduler:

One View Watchlist	Applicable Program	Query Used
Overdue PMs	Work With Work Orders (P48201)	Overdue PMs
Open Emergency Work Orders	Work With Work Orders (P48201)	Open Emergency Work Orders
Overdue Work Orders	Work With Work Orders (P48201)	Overdue Work Orders
CBM Alerts	Condition-Based Alerts Workbench (P1310)	CBM Alerts

| One View Watchlist	Applicable Program	Query Used
CBM Warnings	Condition-Based Alerts Workbench (P1310)	CBM Warnings

The Maintenance Technician Persona

The maintenance technician is responsible for equipment repairs and maintenance tasks at the equipment site.

The delivered persona components for the maintenance technician provide a quick view of the work orders that are assigned to the current user.

Active Content EnterpriseOne Page for the Maintenance Technician Persona

The Active Content EnterpriseOne Page for the maintenance technician includes information organized in tiles. You can set up the data that you want to view in the tiles by using the query functionality.

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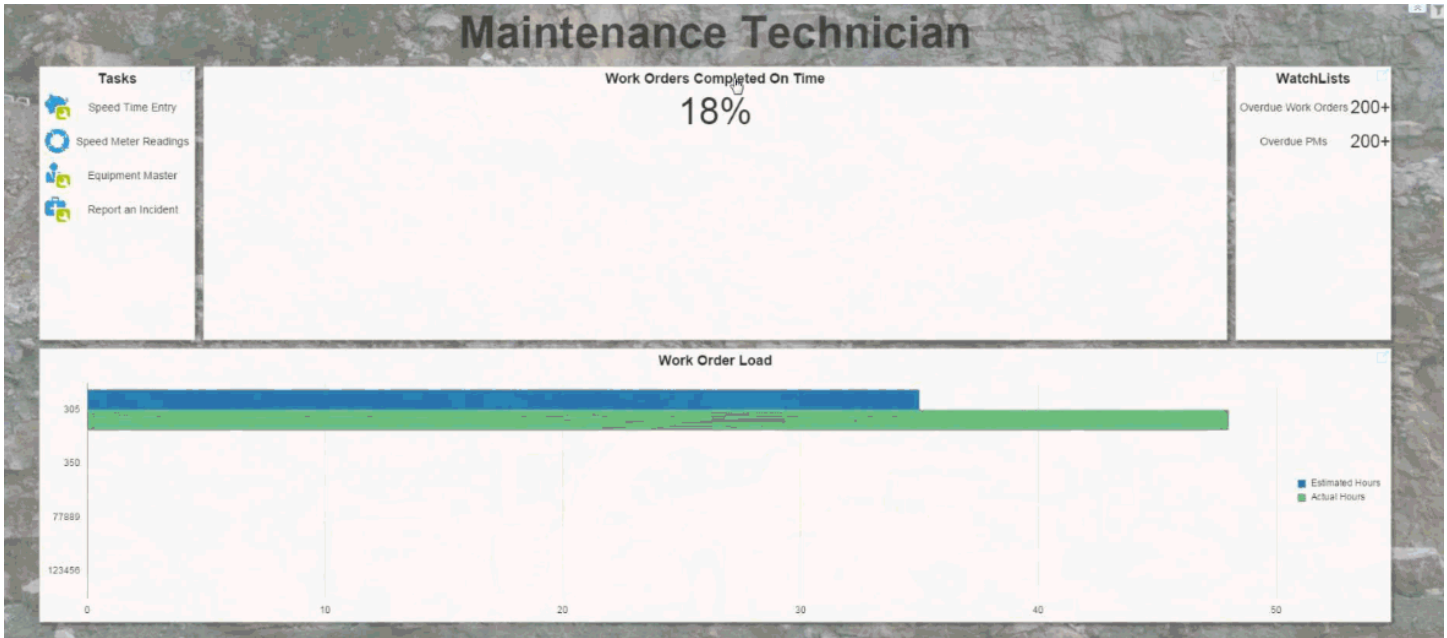
The following table describes the components of the Active Content EnterpriseOne Page available for the maintenance technician:

Component	Component Type	Description
Tasks	Links	Use these links to access JD Edwards EnterpriseOne applications:

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Component	Component Type	Description
		• Speed Time Entry Click the Speed Time Entry link to access the Speed Time Entry program (P051121). • Speed Meter Readings Click the Speed Meter Readings link to access the Speed Meter Readings program (P12120U). • Equipment Master Click the Equipment Master link to access the Work With Equipment Master program (P1701). • Report an Incident Click the Report an Incident link to access the Report an Incident program (P54HS30).
Work Orders Completed On Time	Graph	You can view the percent of work orders completed on time. This metric is based on the Work With Work Orders program (P48201), where the value of the Assigned To field is the address book number of the user who is currently logged in. To calculate this metric, the system considers only work orders that have been completed (the Actual Finish Date is not a blank value). This tile displays the percent of work orders that were completed early or on time, where the Requested Finish Date is equal to or greater than the Actual Finish Date.
Work Order Load	Graph	This vertical bar chart displays the work orders to which you are assigned, with the Requested Finish Date in the current week. The chart plots the total labor hours for each day of the week with the work order number displayed on each bar. The chart enables you to view how much work has been assigned to you this week and whether you are over-assigned or under-assigned. The data on this tile is based on the Work With Work Orders program (P48201) and the Work Order Labor Details program (P17732).
Watchlists	One View Watchlist results	You can view the following One View Watchlist results: • Overdue Work Orders: You can view the number of work orders for which the Requested Finish Date is earlier than today and the Actual Finish Date is blank. Click this link to access the Work With Work Orders program (P48201). • Overdue PMs: You can view the number of preventive maintenance work orders (Work Order

Component	Component Type	Description
		Type = 6) for which the Actual Finish Date is blank. Click this link to access the Work With Work Orders program (P48201).

CafeOne Layouts for the Maintenance Technician Persona

The following CafeOne layouts are available for the maintenance technician:

- Repairs
- Meter Reading
- Parts and Labor

The following table describes the content frames in the Repairs layout:

Note: The Repairs and Meter Reading layouts contain a placeholder for a map that you can set up to display the current location of the equipment that you select in the enabled EnterpriseOne form. When setting up the map, you can associate the map data to the Latitude and Longitude grid columns of the enabled Work with Equipment Master form. The placeholder includes a link to a video recording that illustrates how to create a dynamic map link.

Content	Content Type	Description
Work with Equipment Master Form (W1701A)	Enabled EnterpriseOne form	This is a fully functional EnterpriseOne form. Use this form to locate and review equipment master records.
View Work Orders Form (W48201EA)	Embedded EnterpriseOne Form	This is an embedded EnterpriseOne form from the Work Order Search program (P48201E). This form is dynamically linked to the enabled EnterpriseOne form. The Asset Number grid column in the enabled form is dynamically linked to the Equipment Number field in the embedded form. Therefore, the information in the embedded form changes when you change the value of the Asset Number column.
View Equipment Maintenance Records Form (W12071EA)	Embedded EnterpriseOne Form	This is an embedded EnterpriseOne form from the Equipment PM Backlog program (P48201E). This form is dynamically linked to the enabled EnterpriseOne form. The Asset Number grid column in the enabled form is dynamically linked to the Equipment Number field in the embedded form. Therefore, the information in the embedded form changes when you change the value of the Asset Number column.

The following table describes the content frames in the Meter Reading layout:

Content	Content Type	Description
Work with Equipment Master Form (W1701A)	Enabled EnterpriseOne form	This is a fully functional EnterpriseOne form. Use this form to locate and review equipment master records.
Edit Meter Readings Form (W12120EA)	Embedded EnterpriseOne Form	This is an embedded EnterpriseOne form from the Meter Readings program (P12120E). This form is dynamically linked to the enabled EnterpriseOne form. The Asset Number grid column in the enabled form is dynamically linked to the Equipment Number field in the embedded form. Therefore, the information in the embedded form changes when you change the value of the Asset Number column.

The following table describes the content frames in the Parts and Labor layout:

Content	Content Type	Description
Work With Work Orders Form (W48201A)	Enabled EnterpriseOne form	This is a fully functional EnterpriseOne form. Use this form to locate and review work orders.
Work Order Parts List Revisions Form (W17730A)	Embedded EnterpriseOne Form	This is an embedded EnterpriseOne form from the Work Order Parts Detail program (P17730). This form is dynamically linked to the enabled EnterpriseOne form. The Order Number grid column in the enabled form is dynamically linked to the Order Number field in the embedded form. Therefore, the information in the embedded form changes when you change the value of the Order Number column.
Work Order Labor Details Form (W17732A)	Embedded EnterpriseOne Form	This is an embedded EnterpriseOne form from the Work Order Labor Detail program (P17732). This form is dynamically linked to the enabled EnterpriseOne form. The Order Number grid column in the enabled form is dynamically linked to the Order Number field in the embedded form. Therefore, the information in the embedded form changes when you change the value of the Order Number column.

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12 Creating Equipment Master Records

Understanding Equipment Master Records

Equipment master information is the primary data that is associated with the equipment in the system; it is made up of many equipment masters. You create an equipment master for each piece of equipment in the system. The equipment master establishes basic information about a piece of equipment, such as:

- Identification numbers
- Description
- Category codes
- Account coding
- Dates
- Location
- Status

You must identify every piece of the equipment in the system before you can use the maintenance features of the software. After you create equipment masters for the equipment, you can use the information to:

- Search online for the status, location, and activity of equipment.
- Track historical, current, and planned physical locations for a piece of equipment.
- Relocate equipment.
- Keep detailed maintenance and project logs.
- Revise parent and component relationships.
- Revise equipment status.
- Bill jobs or business units for the use of the equipment.
- Account for quantities of equipment.

> **Note:**
>
> - *Understanding Equipment Setup*.
>
> - *Setting Up Supplemental Data for Equipment*.
>
> - *"Setting Up Default Managers and Supervisors" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .
>
> - *"Creating Asset Identification Information" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

Mobile Applications for Equipment Master

The following mobile applications are available, and can be used to manage equipment information on a mobile device:

- Manage Equipment (Tablet)

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- Manage Equipment (Smartphone)
- Service Equipment (Tablet)
- Service Equipment (Smartphone)

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

Additionally, see the topics *Manage Equipment Mobile Applications* and *Manage Customer Equipment Mobile Applications* in the *JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide* .

Common Elements Used in This Chapter

Serial Number
Enter an alphanumeric number up to 25 characters that you can use as an alternate asset identification number.

You might use this number to track assets by the manufacturer's serial number. You are not required to use a serial number to identify an asset. Every serial number that you enter must be unique.

This field is required only if the appropriate processing option is set accordingly.

Unit Number
Enter an alphanumeric code up to 12 characters to be used as an alternate identification number for an asset.

This number is not required, nor does the system assign a number if you leave the field blank when you add an asset. If you use this number, it must be unique. For equipment, this is typically the serial number.

Creating Equipment Master Records Manually

This section provides an overview of manual creation of equipment master records and discusses how to:

- Create equipment master records manually.
- Set processing options for the Work with Equipment Master program (P1701).
- Set processing options for the Equipment Master Revisions program (P1702).

Understanding Manual Creation of Equipment Master Records

You can create equipment records manually for those products that are not processed through sales orders.

When you create equipment records, the system creates records in these tables:

- Asset Master File (F1201).
- Location Tracking Table (F1204).
- Equipment Master Extension (F1217).
- Equipment Master Location History (F1731).
- Status History File (F1307).
- Parent History (F1212).

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To manually create equipment master information, you use the Equipment Master Revisions form and enter information on these tabs:

- Customer/Equipment
- Classification 1
- Classification 2
- Classification 3
- Accounting
- Service

Forms Used to Create Equipment Master Records Manually

Form Name	FormID	Navigation	Usage
Work with Equipment Master	W1701A	Equipment Information (G1311), Equipment Master	Locate and review equipment master records.
Equipment Master Revisions	W1702A	Click Add on the Work with Equipment Master form.	Create equipment master records manually.

Creating Equipment Master Records Manually

Access the Equipment Master Revisions form.

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Equipment Master Revisions

Work with Equipment Master | **Equipment Master Revisions**

✓ ✕ ⊞ Form ‹ › ⚙ Tools

Equipment Number	801	CNC TURNING CENTERS

Customer / Equipment Classification 1 Classification 2 Accounting Service Attachments

Customer

Site Number ★	4242	Capital System DO NOT MODIFY	Date Acquired	01/02/2014
Customer Number	4242	Capital System DO NOT MODIFY	Installation Date	01/02/2014
Country	US	United States	Date Disposed or Retired	
☐ Terms Accepted Flag		Registration Status	In Service Date	

Dates

Equipment

Unit Number		Equipment Status	AV Available - On Job Site
Serial Number		Parent Model	
Parent Number	801 CNC TURNING CENTERS	Proof of Purchase	.
Branch	7 Mountain West Branch	Sales Type	.
Inventory Item Number			
Product Model	No Model	Longitude	-104.997240
Product Family	.	Latitude	39.751640
Parts List Number	801	☐ Company Owned	
		☑ Meter Reading Required	
More Descriptions		☑ Allow Work Order and Contracts	
		☑ Allow Meter Schedules	

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Customer/Equipment

Date Acquired

Specify the date that the asset was acquired.

This date is typically the start depreciation date, but you can specify a different start depreciation date on the Depreciation Information form.

If you are using the half-year convention, you must adjust the start depreciation date manually.

Installation Date

Enter the date that the contract for the asset was put into effect.

Allow Work Order and Contracts

(Release 9.2 Update) Select this check-box to allow creation of work orders and contracts for this equipment. If you leave this check-box blank, the system displays an error when you create a work order or a contract for this equipment.

Allow Meter Schedules

Enter a code that indicates whether you can use meters to schedule preventive maintenance tasks for this piece of equipment.

Proof of Purchase

Enter a code that indicates whether a customer has supplied a proof of purchase.

Blank: The system enables the Date field.

If you enter a value, the system disables the Date field. If you write a billable contract for an equipment record, the system disables the Proof of Purchase and Date fields.

Parent Number

Enter a parent number that groups related components together.

You can associate each item of property and piece of equipment with a parent item. For example, you can associate a mobile telephone with a specific automobile (the parent), a printer with a computer (the parent), or a flat bed with a specific truck chassis (the parent).

> **Note:** If this is a data entry field, the default value is the asset number. For example, if the asset number is 123, the system assigns 123 as the default parent number.

Company Owned

Select this option to indicate whether an equipment record is company owned.

This is optional.

Service

Technician

Enter the address number of an alternate location to which the owner wants the invoice (application) sent.

Default Dealer

Enter the default dealer for the customer.

Assessor Number

Enter the address book number that identifies the assessor.

Distributor

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Enter the address book number that identifies the distributor of the equipment.

Setting Processing Options for the Work with Equipment Master Program (P1701)

Use these processing options to supply the default values for the Work with Equipment Master program.

Categories

These processing options specify defaults for category codes.

1. Category Code 1 (Accounting Class)
Enter a value from user-defined code (UDC) table 12/C1 (Major Accounting Class) that the system uses to search for the equipment.

If you leave this field blank, the system selects all.

2. Category Code 2 (Equipment Class)
Enter a value from UDC 12/C2 (Major Equipment Class) that the system uses to search for the equipment.

If you leave this field blank, the system selects all.

3. Category Code 3 (Manufacturer)
Enter a value from UDC 12/C3 (Manufacturer) that the system uses to search for the equipment.

If you leave this field blank, the system selects all.

4. Category Code 4 (Model Year)
Enter a value from UDC 12/C4 (Model Year) that the system uses to search for the equipment.

You use the Model Year category code to further define the subclass codes. For example, you can define a 1990 International Harvester, single-axle, within the subclass for trucks.

If you leave this field blank, the system selects all.

5. Category Code 5 (Usage Miles or Hours)
Enter a value from UDC 12/C5 (Usage Miles or Hours) that the system uses to search for the equipment.

If you leave this field blank, the system selects all.

You use the usage category codes to further define the subclass codes.

6. Category Code 6,7. Category Code 7,8. Category Code 8,9. Category Code 9,10. Rate Group,11. Category Code - F/A 11through 23. Category Code - F/A 23
Enter a value from the appropriate UDC that the system uses to search for the equipment.

If you leave this field blank, the system selects all.

Defaults

These processing options supply default values on the Work with Equipment Master form.

1. Responsible Business Unit
Specify the business unit that is responsible for the equipment costs. The system uses this value when validating the depreciation defaults for the asset cost account.

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2. Business Unit - Location

Specify the current physical location of an asset.

3. Equipment Status

Enter a value from UDC 12/ES (Status or Disposal Code) that the system assigns to the equipment record.

4. Company

Specify the company that is responsible for the equipment costs.

The system uses this value when validating the depreciation defaults for the asset cost account.

5. Product Family

Enter a value from UDC 17/PA (Product Family) that identifies the default product family.

Blank: Selects all

The system uses this processing option when searching for equipment records.

6. Product Model

Enter a value from UDC 17/PM (Product Model) that identifies the default product model.

If you leave this field blank, the system selects all.

The system uses this processing option when searching for equipment records.

Display Child Records (Release 9.2 Update)

Specify whether the system should enable the option to display child records when you search for an equipment. Values are:

Blank: Enable option to display child records

1: Disable option to display child records

Display Disposed Records (Release 9.2 Update)

Specify whether the system should enable the option to display disposed records when you search for an equipment. Values are:

Blank: Enable option to display disposed records

1: Disable option to display disposed records

Process

1. CRM User

Specify whether the system runs the application for the CRM user. Values are:

Blank: Non CRM User

1: CRM User

3. Override Address Visual Assist

Use this processing option to override the visual assist on the address fields on the Work with Equipment Master form. If you leave this processing option blank, the system uses the default visual assist defined on the data dictionary item. Values are:

Blank: Use the default visual assist from the address data item.

1: Use A/B Word Search (P01BDWRD) as the visual assist for address fields.

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Versions

These processing options specify the versions of programs to access from the equipment records.

1. Equipment Master Revisions (P1702) Version

Specify the version of the Equipment Master Revisions program (P1702).

Blank: ZJDE0001

2. Scheduling Workbench (P48201) Version

Specify the version of the Work With Work Orders program (P48201) that you access from the equipment master record.

Blank: ZJDE0002

3. Status History (P1307) Version

Specify the version of the Status History program (P1307) that you access from the equipment master record.

Blank: ZJDE0002

4. Equipment Message Log (P1205) Version

Specify the version of the Equipment Message Log program (P1205) that you access from the equipment master record.

Blank: ZJDE0002

5. Equipment PM Schedule (P1207) Version

Specify the version of the Equipment PM Schedule program (P1207) that you access from the equipment record.

Blank: ZJDE0002

6. Cost Summary (P122101) Version

Specify the version of the Cost Summary program (P122101) that you access from the equipment master record.

Blank: ZJDE0003

7. Bill of Material Inquiry (P30200) Version

Specify the version of the Bill of Material Inquiry program (P30200) that you access from the equipment record.

Blank: ZJDE0001

8. Service Entitlement Inquiry (P1723) Version

Specify the version of the Entitlements Inquiry program (P1723) that you access from the equipment master record.

Blank: ZJDE0001

9. Case History (P17500) Version

Specify the version of the Work With Cases program (P17500) that you access from the equipment master record.

Blank: ZJDE0003

10. Item Master (P4101) Version

Specify the version of the Item Master program (P4101) that you access from the equipment master record.

Blank: ZJDE0001

11. Supplemental Data (P00092) Version

Specify the version of the Supplemental Data program (P00092) that you access from the equipment master record.

Blank: ZJDE0001

12. Equipment Master Related Orders (P17023) Version

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Specify the version of Equipment Master Related Order Information program (P17023) to use.

The system uses this version to access orders that are associated with the selected equipment record when you select Equipment Master, then Related Orders from the Row menu on the Work with Equipment Master form.

Blank: ZJDE0001

13. Equipment Master Parent/Child (P12017) Version

Specify the version of the Equipment Master Parent/Child program (P12017) that you access from the equipment master record.

Blank: ZJDE0002

14. Location Information (P1201) Version

Specify the version of the Asset Master Information program (P1201) that you access from the equipment record.

Blank: ZJDE0001

15. Work With Locations (P12215) Version

Specify the version of the Work With Locations program (P12215) that you access from the equipment record.

Blank: ZJDE0001

16. Location Transfer (P12115) Version

Specify the version of the Location Transfer program (P12115) that you access from the equipment record.

Blank: ZJDE0001

17. Equipment Master Address Locations (P1704) Version

Specify the version of the Equipment Master Address Location Revisions program (P1704) that you want to use.

Blank: ZJDE0001

18. Item Branch (P41026) Version

Specify the version of the Item Branch program (P41026) that you want to use.

Blank: ZJDE0001

19. Equipment Backlog (P13220) Version

Specify the version of the Equipment Backlog program (P13220) that you want to use.

Blank: ZJDE0001

20. PM Orders (P12071) Version

Specify the version of the PM Backlog program (P12071) that you want to use.

Blank: ZJDE0001

21. Equipment Parts List (P13017) Version

Specify the version of the Equipment Parts List program (P13017) that you want to use.

Blank: ZJDE0001

22. Equipment Master (P90CD001) Version

Specify the version of the Equipment Master Revisions program (P90CD001) that you want to use. This program is used only when the CRM User processing option on the Process tab is set to **1** (CRM User).

Blank: ZJDE0001

23. Equipment Work Orders (P48022) Version

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Specify the version of the Equipment Work Orders program (P48022) that you want to use from the equipment master record.

Blank: ZJDE0001

24. Equipment Work Order (P13714) Version

Specify the version of the Equipment Work Order program (P13714) that you want to use from the equipment master record.

Blank: ZJDE0001

25. Service Work Order (P17714) Version

Specify the version of the Service Work Order program (P17714) that you want to use.

Blank: ZJDE0001

Setting Processing Options for the Equipment Master Revisions Program (P1702) (Release 9.2 Update)

Use these processing options to set default values for the Equipment Master Revisions program.

> **Note:** Access these processing options by entering **IV** (interactive versions) in the Fast Path field.

Edits

These processing options specify requirements for when you add equipment records.

1. Unit Number Required

Specify whether the system requires a unit number when you add an equipment record. Values are:

Blank: Do not require a unit number.

1: Require a unit number.

> **Note:** This processing option does not apply to the Speed Registration program (P1705).

2. Serial Number Required

Specify whether you are required to enter a serial number when you add an equipment record. Values are:

Blank: Do not require a serial number.

1: Require a serial number.

3. Inventory Item Number Required

Specify whether you are required to enter an inventory item number when you add an equipment record. Values are:

Blank: Do not require an inventory item number.

1: Require an inventory item number.

4. Base Warranty Contracts

Specify whether to generate a base warranty contract when you add an equipment record. Values are:

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Blank: Do not generate a base warranty contract.

1: Generate a base warranty contract.

5. Base Warranty Contract Start Date

Specify which start date the system uses for the base warranty contract. Values are:

Blank: Use the installation date as the start date.

1: Use the acquired date as the start date.

6. Require Base Warranty

Specify whether the system requires base warranty defaults before you add an equipment record. Values are:

Blank: Do not require base warranty defaults.

1: Require base warranty defaults.

7. Display Base Warranty

Specify whether the system displays base warranty contracts after you add an equipment record. Values are:

Blank: Do not display base warranty contracts.

1: Display base warranty contracts.

8. Create Mailing Data

Specify whether the system automatically creates mailing data in the Equipment Master Location Details table (F17311) when you add an equipment record. Values are:

Blank: Do not automatically create mailing data.

1: Automatically create mailing data.

9. Assessor Default

Specify whether the system assigns the default value for the assessor. Values are:

Blank: Assign the assessor.

1: Do not assign the assessor.

Defaults

These processing options supply default values on the Equipment Master Revisions form.

1. Company

Specify the company that is responsible for the equipment costs.

The system uses this value when validating the depreciation defaults for the asset cost account.

2. Responsible Business Unit

Specify the business unit that is responsible for the equipment costs.

The system uses this value when validating the depreciation defaults for the asset cost account.

3. Cost Center

Specify the business unit component of the asset cost account that the system uses for tracking equipment costs.

The system uses the asset cost account to determine which depreciation default accounts to validate.

4. Account Object

Specify the object component of the asset cost account that the system uses for tracking equipment costs.

The system uses the asset cost account to determine which depreciation default accounts to validate.

5. Account Subsidiary

Specify the subsidiary component of the asset cost account that the system uses for tracking equipment costs.

The system uses the asset cost account to determine which depreciation default accounts to validate.

6. Default Cost Account from Parent

Specify whether the parent asset supplies default values for cost account information when you add children assets. Values are:

Blank: Do not use cost account information.

1: Use cost account information.

7. Create Account Balances Record

Specify whether the system creates an account balances record when you add an equipment record. Values are:

Blank: Do not create account balances.

1: Create account balances.

8. Beginning Equipment Status

Enter a value from UDC 12/ES (Status or Disposal Code) that identifies the initial status that the system assigns to the equipment record.

9. Beginning Registration Status

Enter a value from UDC 17/RS (Product Registration Status) that identifies the initial registration status that the system assigns to the equipment record.

10. Allow Work Order

Specify a default value for the Allow Work Order field when adding an Equipment Master record. Values are:

Blank: Do not allow work orders.

1 or Y: Allow work orders.

11. Location Default

Specify whether the system derives the equipment location from the responsible business unit. Values are:

Blank: No Location.

1: Use the location from the responsible business unit.

12. Location Start Effective Date

Specify the effective start date for the equipment location. Values are:

Blank: Use the system date.

1: Use the date acquired.

13. Allow Meter Schedules

Specify the default value for the Allow Meter Schedules field when adding an Equipment Master record. Values are:

Blank: Do not allow meter based PM schedules.

1: Allow meter based PM schedules.

Process

1. CRM User

Specify whether the system runs the application for the CRM user. Values are:

Blank: Non-CRM user.

1: CRM user.

2. Override Address Visual Assist

Use this processing option to override the visual assist on the address fields on the Work with Equipment Master Revisions form. If you leave this processing option blank, the system uses the default visual assist defined on the data dictionary item. Values are:

Blank: Use the default visual assist from the address data item.

1: Use A/B Word Search (P01BDWRD) as the visual assist for address fields.

Export

These processing options supply export values on the Equipment Master Revisions form.

1. Enter the Transaction Type for the export transaction.
Enter a value from UDC 00/TT (Transaction Type) that identifies the transaction type for the export transaction.

If you leave this processing option blank, the system does not perform interoperability processing.

2. Enter the APS Outbound Processor (R34A400) Version to call when performing interoperability processing.
Specify which version of APS Outbound Processor (R34A400) the system uses when it performs interoperability processing.

Blank: XJDE0002

Versions

These processing options specify the versions of programs to launch from the equipment records.

1. Service Entitlement Inquiry (P1723) Version

Specify the version of the Entitlements Inquiry program (P1723) that you access from the Equipment Master Revisions form.

Blank: ZJDE0001

2. Scheduling Workbench (P48201) Version

Specify the version of the Work With Work Orders program (P48201) that you access from the Equipment Master Revisions form.

Blank: ZJDE0002

3. Status History (P1307) Version

Specify which version of Status History (P1307) the system uses.

Blank: ZJDE0002

4. Equipment Message Log (P1205) Version

Specify which version of Equipment Message Log (P1205) the system uses.

Blank: ZJDE0002

5. Equipment PM Schedule (P1207) Version

Specify which version of Equipment PM Schedule (P1207) the system uses.

Blank: ZJDE0002

6. Cost Summary (P122101) Version

Specify which version of Cost Summary (P122101) the system uses.

Blank: ZJDE0003

7. Bill of Material Inquiry (P30200) Version

Specify the version of the Bill of Material Inquiry program (P30200) that you access from the Equipment Master Revisions form.

Blank: ZJDE0001

8. Quick Customer Add (P01015) Version

Specify the version of the Quick Customer/Contact Add program (P01015) that you access from the Equipment Master Revisions form.

Blank: ZJDE0001

9. Case History (P17500) Version

Specify the version of the Work With Cases program (P17500) to use.

Blank: ZJDE0003

10. Item Master (P4101) Version

Specify the version of the Item Master program (P4101) that you access from the Equipment Master Revisions form.

Blank: ZJDE0001

11. Item Branch (P41026) Version

Specify the version of the Item Branch program (P41026) that you access from the Equipment Master Revisions form.

Blank: ZJDE0001

12. Equipment Master Related Orders (P17023) Version

Specify which version of Equipment Master Related Order Information (P17023) the system uses.

Blank: ZJDE0001

13. Equipment Master Parent/Child (P12017) Version

Specify the version of the Equipment Master Parent/Child program (P12017) that you access from the Equipment Master Revisions form.

Blank: ZJDE0002

14. Supplemental Data (P00092) Version

Specify the version of the Supplemental Data program (P00092) that you access from the Equipment Master Revisions form.

Blank: ZJDE0005

15. Location Information (P1201) Version

Specify the version of the Asset Master Information program (P1201) that you access from the Equipment Master Revisions form.

Blank: ZJDE0001

16. Location Transfer (P12115) Version

Specify the version of the Location Transfer program (P12115) that you access from the Equipment Master Revisions form.

Blank: ZJDE0001

17. Equipment Parts List (P13017) Version

Specify the version of the Equipment Parts List program (P13017) that the system uses.

Blank: ZJDE0001

18. Equipment Master Address Location (P1704) Version

Specify the version of the Equipment Master Address Location Revisions program (P1704) that the system uses.

Blank: ZJDE0001

19. Work With Locations (P12215) Version

Specify the version of the Work With Locations program (P12215) that the system uses.

Blank: ZJDE0001

20. Equipment Backlog (P13220) Version

Specify the version of the Work With Equipment Work Orders program (P13220) that the system uses.

Blank: ZJDE0001

21. PM Orders (P12071) Version

Specify the version of the Preventive Maintenance Backlog program (P12071) that the system uses.

Blank: ZJDE0001

22. Accounts (P0901) Version

Specify the version of the Accounts program (P0901) that the system uses.

Blank: ZJDE0001

23. Contracts (P1720) Version

Specify the version of the Work With Contracts program (P1720) that the system uses.

Blank: ZJDE0001

24. Parent History Inquiry (P12212) Version

Specify the version of the Work With Parent History program (P12212) that the system uses.

Blank: ZJDE0001

25. License Information (P1206) History

Specify the version of the License Information program (P1206) that the system uses.

Blank: ZJDE0001

26. Equipment Revisions (P90CD001) Version

Specify the version of the Equipment Revisions program (P90CD001) that the system uses. This program is used only when the CRM User processing option on the Process tab is set to **1** (CRM User).

Blank: ZJDE0001

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Data Selection

The Equipment Master Update from Ship Confirm enables additional data selection criteria. These processing options specify the additional criteria.

1. Last Status Code

Enter a value from UDC 40/AT (Activity/Status Code) that identifies the last status of a sales order that is required to add an equipment record.

2. Country

Enter a value from UDC 00/CN (Country Codes) that identifies the country code of customers whose orders are to be added to the equipment master.

Creating Equipment Records from Fixed Assets

This section discusses how to:

- Create equipment records from fixed assets.
- Set processing options for the Create Equipment Master Extension Tables program (P17021).

You can create an equipment record from an existing record in the JD Edwards EnterpriseOne Fixed Assets database.

Forms Used to Create Equipment Records from Fixed Assets

Form Name	FormID	Navigation	Usage
Create Equipment Master Extension Tables	W17021A	Periodic Equipment Master Processing (G1721), Create Equip Master from Fixed Assets	Locate the record.
Equipment Master Revisions	W1702A	Select a record on the Create Equipment Master Extension Tables form, and select Create Extension from the Row menu.	Create equipment records from fixed assets. Enter information such as site number, customer number, date acquired, installation date, serial number, inventory item number, product model, and product family.

Locating the Records

Access the Create Equipment Master Extension Tables form.

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When you click Find, the system displays only the assets that do not have the Equipment Master Extension (F1217) table populated.

Setting Processing Options for the Create Equipment Master Extension Tables Program (P17021)

Use these processing options to supply the default values for the Create Equipment Master Extension Tables program.

Defaults

This processing option specifies the beginning registration status.

1. Beginning Registration Status

Enter a value from UDC 17/RS (Product Registration Status) that identifies the initial registration status that the system assigns to the equipment record.

Edits

These processing options specify default values for equipment base warranties.

1. Generate Base Warranty Contracts

Specify whether the system generates base warranty contracts when you create an equipment record. Values are:

Blank: Do not generate base warranty contracts.

1: Generate base warranty contracts.

2. Base Warranty Contract Start Date

Specify which date the system uses as the start date for the base warranty contract. Values are:

Blank: Use the installation date as the start date.

1: Use the acquired date as the start date.

3. Display Base Warranty

Specify whether the system displays base warranty contracts after you add an equipment record. Values are:

Blank: Do not automatically display the base warranty contracts after creating an equipment record.

1: Automatically display the base warranty contracts after creating an equipment record.

Versions

These processing options specify the versions of programs to launch from Equipment Master Revisions.

1. Equipment Master Revisions (P1702) version

Specify the version of the Equipment Master Revisions program (P1702). The system uses the processing options from this version, such as serial number requirements and base warranty default requirements, when creating Equipment Master extension records.

Blank: ZJDE0001

2. Equipment Master Revisions (P1702) version

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Specify the version of the Equipment Master Revisions program (P1702) that the system uses to display the newly created equipment master record.

Blank: ZJDE0001

3. Work With Contracts (P1720) version
Specify the version of Work With Contracts (P1720) to use when you create base warranty contracts.

Blank: ZJDE0001

Using Equipment Geo Coding (Release 9.2 Update)

This section provides an overview of equipment geocoding and describes how to:

- Run the Update Equipment Geo Code (R17220W) Report
- Set up processing options for the Update Equipment Geo Code (R17220W)

Understanding Equipment Geo Coding

Equipment geocoding converts the equipment's location into latitude and longitude values. These values are available for use in a map and search by proximity functionality in the mobile applications.

To obtain the geocode coordinates of equipment location record, you must set the value of Enable Location Services to Yes in the Work with EnterpriseOne System Control (P99410) program.

Note: The latitude and longitude fields are view-able in the web application.

Running the Update Equipment Geo Code Program (R17220W)

To run the Update Equipment Geo Code report, you must perform data selection on the Asset Master File (F1201) table, Location Tracking (F1204) table and Equipment Master Extension (F1217) table.

When you run the R17220W report, the system creates, or updates the location of an equipment based on the processing option specified in the Update Equipment Geo Code program. The system uses the Address Book addresses which communicates with the Oracle Location Services to convert the equipment location to latitude and longitude coordinates for each record of equipment with an Address Line, City, and Postal code.

Tip: See *"Equipment Locations" in the JD Edwards EnterpriseOne Applications Business Interface Reference Guide* .

Setting Processing Options for the Update Equipment Geo Code Program (R17220W)

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

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Details

1. Maintain F17311 Records

Use this processing option to specify whether the system uses the existing F17311 records with a geo-code. Values are:

Blank: Replace existing equipment F17311 records with a new latitude and longitude geo-code.

1: Maintain the existing latitude and longitude geo-code on the existing equipment F17311 records.

2. Physical Address Location

Use this processing option to specify if the system uses the location of the physical address when creating or updating F17311 records. Values are:

1: Customer Number (Default)

2: Site

3: Business Unit

> **Note:**
>
> If you set the processing option based upon customer number, you must ensure your data selection only selects records where the customer's address is the primary location of the equipment. This can be any data associated with the equipment such as the customer number or category codes based upon your setup.
>
> For example, if you specify the processing option as Customer Number, your data selection may select equipment that has customer number defined in the equipment. When you run the R17220W report, based on the processing options specified, the system updates the latitude and longitude of customer's address for the equipment in the F17311 table.

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13 Working with Equipment Information

Understanding Equipment Records

Many of the daily tasks that you perform with JD Edwards EnterpriseOne Equipment Information Management require the ability to locate a specific record quickly. To locate an equipment record or group of records, you can use a variety of search criteria. After you locate the records, you can perform most tasks that are related to the Equipment Master without accessing other menus or programs.

If you frequently search for similar records, you can use processing options to specify default values for the first 10 fixed assets category codes.

You can find the processing options for the Work with the Equipment Master Program (P1701) in another chapter in this guide.

See *Creating Equipment Master Records Manually*.

> **Note:**
>
> - *"Understanding Supplemental Information for Fixed Assets" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"Understanding Message Logs" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"Working with Parent and Component Information" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"Working with Equipment Locations" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .

Mobile Applications for Managing Equipment

The following mobile applications are available, and can be used to manage equipment information on a mobile device:

- Manage Equip (Tablet)
- Manage Eq (Smartphone)
- Service Equip (Tablet)
- Service Equip (Smartphone)
- Equipment Work Order Time Entry (Smartphone and Tablet)

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

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

- *Manage Equipment Mobile Applications*
- *Manage Customer Equipment Mobile Applications*

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- *Equipment Work Oder Time Entry Mobile Applications*

Searching for Equipment Records

This section lists the form used to search for equipment records.

Form Used to Search for Equipment Records

Form Name	FormID	Navigation	Usage
Work with Equipment Master	W1701A	Equipment Information (G1311), Equipment Master	Complete the header information and, optionally, narrow the search by completing fields in the query-by-example (QBE) row.

Tracking Equipment Status

This section provides an overview of equipment status and discusses how to:

- Review equipment status.
- Set processing options for the Status History program (P1307).

Understanding Equipment Status

You can review the history of a piece of equipment by the statuses that have been assigned to it, such as available, down, working, and standby. This capability is especially useful for maintaining an audit history of operational statuses and for determining the amount of time that a piece of equipment has been idle due to downtime.

When you access Status History, in addition to the statuses that have been assigned to a piece of equipment, you also can review:

- The ending time (if applicable) and beginning time for each status, as well as the associated dates.
- The total hours that are associated with each occurrence of a particular status.
- The lifetime meter reading at the time of the status change for any of the statistical accounts that you have defined, such as hours, fuel, miles, meter 4, meter 5, and meter 6.
- The cumulative hours for all occurrences of a particular status over the life of the equipment.
- Remarks that are entered when you changed the status of the equipment.

From Status History, you can access Downtime Analysis, from which you can determine the mean or average time between equipment failures. This information is especially useful when comparing actual equipment downtime with manufacturer specifications and analyzing the effectiveness of the maintenance program for a particular piece of equipment.

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Processing options enable you to revise existing remarks for any status change, enter a new remark, or protect the Remark field from future revisions.

After you have reviewed the status history for a piece of equipment, you can track the mean time between failures for the period of time that you specify.

Forms Used to Track Equipment Status

Form Name	FormID	Navigation	Usage
Work With Status History	W1307A	Equipment Information (G1311), Status History	Review equipment status. Locate the equipment record for which you want to track status.
Downtime Analysis	W1307B	Select Analysis from the Form menu on the Work With Status History form.	Enter information such as start effective date, ending effective date, and equipment downtime status. The system displays mean time between failures for the piece of equipment.

Reviewing Equipment Status

Access the Work With Status History form.

A history of each status assigned to the piece of equipment, from its inception to the present, appears.

Setting Processing Options for the Status History Program (P1307)

These processing options supply the default values for the Status History program.

Process

These processing options specify remarks and calendar options.

1. Remarks

Specify whether the system protects the remarks field. Values are:

Blank: Allow modifications to the remarks field.

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1: Protect the remarks field regardless of whether it contains text.

2: Protect the remarks field only if it contains text.

2. Work Day Calendar

Specify the work day calendar that the system uses to calculate the number of days for equipment analysis.

Defaults

These processing options specify defaults for dates and downtime status.

1. Starting Effective Date

Specify the starting date that the system uses for the downtime analysis in the Status History program.

The system uses this date when calculating the mean time between failures. Values are:

Blank: Use the acquired date from the equipment master.

1: Use the installation date from the equipment master.

> **Note:** If you select **1** but the installation date is blank, the system uses the acquired date.

2. Equipment Downtime Status

Enter a value from user-defined code (UDC) table 12/ES (Equipment Status) that you want to use to indicate a downtime status in the Status History program (P1307).

The system uses this status when determining the mean time between failures.

If you leave this processing option blank, the system uses the equipment status from the current status.

Versions

These processing options specify the programs to launch from the Status History program.

1. Work Order Revisions (P17714) Version

Specify the version that the system uses for the Work Order Revisions program (P17714).

Blank: ZJDE0003

2. Equipment Master (P1702) Version

Specify the version that the system uses for the Equipment Master Revisions program (P1702).

Blank: ZJDE0001

Revising Customer and Site History

This section provides an overview of customer and site history and lists the form that is used to revise customer and site history.

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Understanding Customer and Site History

You can easily revise information about equipment customers or locations. This information is especially useful if the equipment is often transferred or resold prior to warranty expiration. You can enter current location dates or dates that become effective in the future.

Form Used to Revise Customer and Site History

Form Name	FormID	Navigation	Usage
Equipment Location Revisions	W1704E	For Capital Asset Management: Equipment Information (G1311), Equipment Master For Service Management: Daily Equipment Master Processing (G1711), Equipment Master Entry Find and select an equipment record on the Work with Equipment Master form. Select Locations, Address Book, and then Transfer from the Row menu.	Revise customer and site location information.

Entering Specification Information

This section provides an overview of specification data, lists a prerequisite, and lists the forms that are used to enter specification information.

Understanding Specification Data

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

Equipment Nameplate

A nameplate is attached to a piece of equipment and often includes information about the equipment, such as:

- Model number

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- Power requirements

- Manufacture date

Specifications Sheets

A specification sheet comes from the equipment manufacturer. Specification sheets include specific information about a piece of equipment, such as:

- Operating and safety instructions

- Power

- Dimensions

You can define the specifications data that you want to keep, in which positions the data is entered, and the length of the data fields. You also can set up the specifications database so that the system edits the data against UDC tables.

> **Note:** Because you determine which data items to validate against UDCs, the system does not display standard search buttons, except for calendars for date values or calculators for numeric values. If you have set up a data item that is validated against a UDC, the system displays a button next to the field for the data item on the Specification Data Revisions form (W1216A). When you click the button, the system displays a list of values for the field.

Prerequisite

Set up specification types for specification information.

Forms Used to Enter Specification Information

Form Name	FormID	Navigation	Usage
Work With Specification Data	W1216C	Supplemental Data (G1318), Specification Data Entry	Enter the asset number (eight digits) and page number.
Specification Data Revisions	W1216A	Click Add after you enter the asset number and page number on the Work With Specification Data form.	Enter specification information in the appropriate fields. **Note:** The fields that appear on this form vary, depending on how you set up the Specification Cross Reference program (P1215).

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Creating an Equipment Parts List

This section provides an overview of the equipment parts list, lists considerations, and discusses how to:

- Create an equipment parts list.

- Set processing options for the Equipment Parts List program (P13017).

Understanding the Equipment Parts List

You can create an equipment parts list (EPL) that enables you to associate parts that are catalogued (item master) and noncatalogued (no item master) directly with an equipment record. You can define the parts list specifically for an individual piece of equipment.

Catalogued items include any item in the inventory master, such as stocked, nonstocked, and standard parts list numbers.

Noncatalogued items are parts that are unlikely to be purchased during the lifetime of the equipment; therefore, they are not considered to be worth the effort of cataloguing.

When the equipment requires repair or maintenance, you then can use the equipment parts list to create a work order parts list when you create the corrective order.

You can use a standard parts list within the equipment parts list. The standard parts list can be used for all similar pieces of equipment. For example, you might need a gearbox that is standard for most forklifts, as well as parts that are specific to an electric forklift.

The Equipment Parts List table is F13017.

> **Note:** If you are an existing user of JD Edwards EnterpriseOne Plant and Equipment Management and are upgrading to JD Edwards EnterpriseOne Capital Asset Management (CAM), you can run a batch program that converts an equipment-referenced inventory item (standard parts list) to a JD Edwards EnterpriseOne CAM equipment parts list.

See *Running the Equipment Parts List Batch Update*.

Forms Used to Create an Equipment Parts List

Form Name	FormID	Navigation	Usage
Work With Equipment Parts List	W13017B	Equipment Information (G1311), Equipment Parts List	Enter an asset number, standard parts list number, branch and a bill of material type, and click Find, and then click Add.

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Form Name	FormID	Navigation	Usage
Equipment Parts List Detail	W13017A	Click Add on the Work With Equipment Parts List form.	Create an equipment parts list. For each part that you want to add, enter the inventory item number, line type, customer/supplier item number, quantity, unit of measure, unit cost, description, cost type, and component branch (specify a component branch only if you want to designate that the item be sourced from a branch other than the work order branch).

Considerations

Keep these considerations in mind when you create an equipment parts list:

- You can create a standard parts list (bill of material) and reuse this parts list on any equipment parts list.

  For example, you might use the standard parts list to create the master parts list for a forklift and then use it on all forklifts.

- You add parts that are specific to an asset as individual items to the equipment parts list.

  These items can be stocked or nonstocked items that are defined in the JD Edwards EnterpriseOne Inventory Management system; or you can add noncatalogued items by using a noninventory, purchasing-only line type. When you add a catalogued item, the system includes any item-specific information. For noncatalogued items, you can determine the default information (such as line type) through the processing options, or you can enter this information manually.

- The equipment parts list displays the parts that are defined for the equipment number as well as the equipment children as defined on the equipment master.

  You can expand the equipment parts list in two ways:

  a. Create an equipment parts list for a child's equipment number to expand the parts list of an equipment child.
  b. Expand a standard parts list.

When you expand a standard parts list, these stocking types must match:

- The stocking type of the parent item that you used to create the standard parts list.

- The stocking type that you set in the processing options of the Equipment Parts List program (P13017) and the Equipment Parts List Search and Select program (P13017S).

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Creating an Equipment Parts List

Access the Equipment Parts List Detail form.

Equipment Parts List Detail

		Line * No.	Inventory Item Number	Ln * Ty	Customer/Supplier Item Number	Stocking Type	Quantity	UM	Unit Cost	Description
		1.00	E200	S		E	1.000000	EA	165.7500	Forklift Master Parts List
		2.00	OEM34B301	S		P	1.000000	EA	39.9900	Brake Shoe Repair Kit
		3.00		J	HFG6080		1.000000	EA	975.0000	Gear Drive Transmission
		4.00		J	HFG6175		1.000000	EA	325.0000	Gear Pump-Lift

Equipment Number 24900 Forklift — Branch M30
Parts List Number 24900 Forklift — Type Bill of Material M
Skip to Line Number

Records 1 - 6

Setting Processing Options for the Equipment Parts List Program (P13017)

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

Defaults

Although processing options are set up during implementation, you can change processing options each time that you run a program.

1. Bill of Material Type

Enter a value from UDC 40/TB (Bill Type) that specifies the default value for the type of bill of material.

Blank: M

2. Line Type

Specify the line type from Line Type Constants (P40205) that the system uses when you add new parts to the EPL.

Blank: J

3. Unit of Measure

Enter a value from UDC 00/UM (Unit of Measure) that specifies the unit of measure that the system uses when adding new noncatalogued parts to the EPL.

Blank: EA

4. Issue Type Code

Enter a value from UDC 41/IT (Issue Type Code) that specifies the issue type code that the system uses when adding new noncatalogued parts to the EPL.

Blank: I (manual issue)

5. Cost Component

Enter a value from UDC 30/CA (Cost Component Add-Ons) that the system uses when adding new noncatalogued parts to the EPL.

Process

1. Supplier Cross-Reference Type Code

Enter a value from UDC 41/DT (Cross Reference Type Code) that specifies the supplier cross-reference code that the system uses when retrieving the supplier cross-reference item number from the F4104 table.

If you specify a supplier cross-reference number for the EPL, the system uses the stock number, OEM (original equipment manufacturer) supplier number, cross-reference code, and the current date.

2. Standard Parts List Stocking Type

Enter a value from UDC 41/I (Stocking Type Code) that the system uses when you inquire on the EPL.

The kit stocking type indicates which catalogued items are set up in the F3002 table. The system uses the kit stocking type to indicate which lines can be expanded, which enables you to view additional bill of material details for a catalogued item.

If you leave this processing option blank, the system uses **M** for the stocking type for standard parts lists.

Versions

1. Equipment Master (P1702) Version

Specify the version of the Equipment Master program (P1702) that the system uses.

Blank: ZJDE0001

2. Inventory Master (P4101) Version

Specify the version of the Inventory Master program (P4101) that the system uses.

Blank: ZJDE0001

3. Item Cross Reference (P4104) Version

Specify the version of the Item Cross Reference program (P4104) that the system uses.

Blank: ZJDE0001

4. Bill of Material (P3002) Version

Specify the version of the Bill of Material program (P3002) that the system uses.

Blank: ZJDE0001

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Copying an Equipment Parts List

This section provides an overview of the Copy Equipment Parts List feature and lists the forms that are used to copy an equipment parts list.

Understanding the Copy Equipment Parts List Feature

You can use the Copy EPL feature only when you have not already defined an equipment parts list for an asset.

Forms Used to Copy an Equipment Parts List

Form Name	FormID	Navigation	Usage
Work With Equipment Parts List	W13017B	Equipment Information (G1311), Equipment Parts List Enter an asset number and standard parts list number. Then enter a branch and a bill of material type, and click Find.	Locate an existing equipment parts list.
Equipment Parts List Detail	W13017A	Click Add on the Work With Equipment Parts List form.	Create a new equipment parts list.
Copy Equipment Parts List	W13017D	Select Copy EPL from the Form menu on the Equipment Parts List Detail form. Enter the equipment number to indicate the asset from which you are copying.	Copy an equipment parts list from another piece of equipment.

Running the Equipment Parts List Batch Update

This section provides an overview of the Equipment Parts Lists Batch Update program and discusses how to set processing options for the Equipment Parts Lists Batch Update program (R13808).

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Understanding the Equipment Parts List Batch Update Program

Run this program to create an equipment parts list for those assets that have inventory item numbers defined in the Equipment Master and that do not have an equipment parts list.

You can run this program in proof or final mode. Both modes display a report that indicates which equipment numbers have a new equipment parts list and the item numbers that are used.

On the Process tab (Bill of Material field) in the processing options, when the equipment parts list is created from the inventory number on the equipment master, two modes are possible:

- Create the equipment parts list by using only the inventory number on the equipment master.
- Create the equipment parts list by using the first level of the standard parts list for the inventory number on the equipment master.

Select Advanced Operations (G1331), Equipment Parts List Batch Update.

Setting Processing Options for the Equipment Parts List Batch Update Program (R13808)

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

Process

1. Proof or Final Mode

Specify whether the system runs the report in proof mode or final mode.

In proof mode, the system prints a report that lists all selected records and those records that are updated when you print in final mode. The system updates the tables only in final mode. Values are:

Blank: Proof mode

1: Final mode

2. Bill of Material Level

Specify the level of the bill of material that the system uses to update the equipment parts list. Values are:

Blank: Inventory item number that is defined in the equipment master record.

1: First level of bill of material.

3. Bill of Material Type

Enter a value from UDC 40/TB (Bill Type) that specifies the type of bill of material.

The system uses the type that is specified when updating the equipment parts list with the first level of the bill of material for the inventory item number that is defined in the equipment master record.

Blank: M (standard manufacturing bill)

Defaults

1. Branch

Specify which branch the system uses to retrieve item information when the equipment master branch is not defined.

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Blank: The system uses the default branch value from the inventory master if no branch record is defined on the equipment master.

2. Line Type

Specify the default line type that the system uses when processing a text line from the bill of material.

Blank: J

3. Unit of Measure

Enter a value from UDC 00/UM (Unit of measure) that specifies the default unit of measure that the system uses when processing a text line from the bill of material.

Blank: EA

4. Issue Type Code

Enter a value from UDC 41/IT (Issue type code) that specifies the default issue type code that the system uses when processing a text line from the bill of material.

Blank: I

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14 Working with Meter Readings

Understanding Meter Readings

Meter reading programs enable you to enter or update meter information about the equipment. You use meter readings to monitor equipment use and initiate maintenance tasks that are based on accumulated statistical units such as miles. For example, you can schedule maintenance for a machine or piece of equipment based on mileage, elapsed time (hours), fuel consumption, cycles, or tonnage. You can define as many accounts for statistical units as you need. However, you can use only six types of statistical units to initiate maintenance. You determine the six types of statistical units that you want to use (such as odometer, fuel, and hours).

You can enter and update meter readings for individual pieces of equipment or for multiple pieces of similar equipment. For speed meter readings, you can create templates to preload the applicable equipment in the order that you select. You can also indicate when a meter rolls over, and you can perform meter changes.

Mobile Applications for Speed Meter Reading

The mobile application available on a mobile tablet device that you can use to enter speed meter readings on a mobile tablet device is Meter Reading (M12120U1).

This application requires system administrator configuration before it is available to individual users. Contact your system administrator to determine whether this application is available for use.

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

- *Meter Reading*

Common Elements Used in This Chapter

Fuel Meter

Enter a code that specifies whether to display the fuel meter values. Values are:

Yes: Display the fuel meter values.

No: Do not display the fuel meter values.

Fuel Meter Current Reading

Enter the current meter reading in a statistical account.

Fuel Meter Net Increase

Enter the net increase (or decrease) in the current amount.

Fuel Meter New Reading

Enter a number that specifies the new meter reading in a statistical account.

Fuel Meter Original Reading

Enter the beginning reading of miles, hours, or fuel for a specific piece of equipment.

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You enter a value in this field only once for each meter. After a piece of equipment accumulates units, you should never have to change the original reading for a meter. When you enter meter information for a piece of used equipment, enter the actual meter reading that is displayed on the face of the meter at the time that you place the equipment in service. The system updates the original reading when you indicate a meter rollover or when you perform a meter replacement.

Hour Meter

Enter a code that specifies whether to display the hour meter values. Values are:

Yes: Display the hour meter values.

No: Do not display the hour meter values.

Hour Meter Current Reading

Enter the current meter reading in a statistical account.

Hour Meter New Reading

Enter a number that specifies the new meter reading in a statistical account.

Hour Meter Original Reading

Enter the beginning reading of miles, hours, or fuel for a specific piece of equipment.

You enter a value in this field only once for each meter. After a piece of equipment accumulates units, you should never have to change the original reading for a meter. When you enter meter information for a piece of used equipment, enter the actual meter reading that is displayed on the face of the meter at the time that you place the equipment in service. The system updates the original reading when you indicate a meter rollover or when you perform a meter replacement.

Meter 4

Enter a code that specifies whether to display the meter 4 values. Values are:

Yes: Display the hour meter values.

No: Do not display the hour meter values.

Meter 4 Current Reading

Enter the current meter reading in a statistical account.

Meter 4 New Reading

Enter a number that specifies the new meter reading in a statistical account.

Meter 4 Original Reading

Enter the beginning reading of meter 4 for a specific piece of equipment.

You enter a value in this field only once for each meter. After a piece of equipment accumulates units, you should never have to change the original reading for a meter. When you enter meter information for a piece of used equipment, enter the actual meter reading that is displayed on the face of the meter at the time that you place the equipment in service. The system updates the original reading when you indicate a meter rollover or when you perform a meter replacement.

Meter 5

Enter a code that specifies whether to display the meter 5 values. Values are:

Yes: Display the hour meter values.

No: Do not display the hour meter values.

Meter 5 Current Reading

Enter the current meter reading in a statistical account.

Meter 5 New Reading

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Enter a number that specifies the new meter reading in a statistical account.

Meter 5 Original Reading

Enter the beginning reading of meter 5 for a specific piece of equipment.

You enter a value in this field only once for each meter. After a piece of equipment accumulates units, you should never have to change the original reading for a meter. When you enter meter information for a piece of used equipment, enter the actual meter reading that is displayed on the face of the meter at the time that you place the equipment in service. The system updates the original reading when you indicate a meter rollover or when you perform a meter replacement.

Meter 6

Enter a code that specifies whether to display the meter 6 values. Values are:

Yes: Display the hour meter values.

No: Do not display the hour meter values.

Meter 6 Current Reading

Enter the current meter reading in a statistical account.

Meter 6 New Reading

Enter a number that specifies the new meter reading in a statistical account.

Meter 6 Original Reading

Enter the beginning reading of meter 6 for a specific piece of equipment.

You enter a value in this field only once for each meter. After a piece of equipment accumulates units, you should never have to change the original reading for a meter. When you enter meter information for a piece of used equipment, enter the actual meter reading that is displayed on the face of the meter at the time that you place the equipment in service. The system updates the original reading when you indicate a meter rollover or when you perform a meter replacement.

Odometer

Enter a code that indicates whether to display the odometer values.

A **Yes** or **No** indicator is used.

Odometer Current Reading

Enter the current meter reading in a statistical account.

Odometer Net Increase

Enter the net increase (or decrease) in the current amount.

Odometer New Reading

Enter the new meter reading in a statistical account.

Odometer Original Reading

Enter the beginning reading of miles, hours, or fuel for a specific piece of equipment.

You enter a value in this field only once for each meter. After a piece of equipment accumulates units, you should never have to change the original reading for a meter. When you enter meter information for a piece of used equipment, enter the actual meter reading that is displayed on the face of the meter at the time that you place the equipment in service. The system updates the original reading when you indicate a meter rollover or when you perform a meter replacement.

Entering Meter Readings

This section provides an overview of meter readings entry, lists a prerequisite, and discusses how to:

- Set processing options for the Meter Readings program (P12120).
- Enter meter readings for a piece of equipment.

Understanding Meter Readings Entry

The Meter Readings program (P12120) enables you to view current readings, enter new readings, and view the net increase.

You can enter and update meter readings for individual pieces of equipment or for multiple pieces of similar equipment. You can enter and update meter readings for individual pieces of equipment when you need to record equipment use on a piece-by-piece basis. You can enter and update meter readings for multiple pieces of equipment if you are:

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

You use selection criteria to specify the pieces of equipment for which the system updates meter information. In addition, you can update equipment records to indicate that a meter was replaced due to damage, which is a meter change-out. You can also indicate when a meter rolls over. A meter rollover is the point at which a meter reaches its maximum value and reverts to a zero reading.

Prerequisite

Verify that these Automatic Accounting Instructions (AAIs) are set up:

- AT00
- FMA
- FMB
- FMC
- FMD
- FME
- FMF
- FMG
- FMH
- FMI

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Forms Used to Enter Meter Readings

Form Name	FormID	Navigation	Usage
Meter Readings	W12120A	Equipment Information (G1311), Meter Readings	Enter meter readings for a piece of equipment.
Meter Change-out	W12120C	Select Meter Change-out from the Row menu on the Meter Readings form.	Identify the meter that you are replacing, and specify information about the old and new meters.
Meter Rollover	W12120D	Select Rollover from the Row menu on the Meter Readings form.	When the meter on a piece of equipment has reached its maximum value and rolled over, enter the information to ensure that the system has accurate meter information for a piece of equipment.
Global Meter Update	W12120E	Select Global Update from the Form menu on the Meter Readings form.	Use selection criteria to enter and update meter readings for multiple pieces of similar equipment. Use this functionality when the net meter change is the same amount for all of the selected pieces of equipment.

Setting Processing Options for the Meter Readings Program (P12120)

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

Defaults

1. Display Odometer Readings

Specify whether the system displays odometer readings. Values are:

Blank: Do not display odometer readings.

1: Display odometer readings.

2. Display Fuel Readings

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Specify whether the system displays fuel readings. Values are:

Blank: Do not display fuel readings.

1: Display fuel readings.

3. Display Hour Readings
Specify whether the system displays hour readings. Values are:

Blank: Do not display hour readings.

1: Display hour readings.

4. Display Meter 4 Readings
Specify whether the system displays meter 4 readings. Values are:

Blank: Do not display meter 4 readings.

1: Display readings.

5. Display Meter 5 Readings
Specify whether the system displays meter 5 readings. Values are:

Blank: Do not display meter 5 readings.

1: Display readings.

6. Display Meter 6 Readings
Specify whether the system displays meter 6 readings. Values are:

Blank: Do not display meter 6 readings.

1: Display readings.

7. Display Children
Specify whether the system displays children assets in the grid. Values are:

Blank: Do not display children assets.

1: Display children assets.

8. Display Disposed
Specify whether the system displays disposed assets. Values are:

Blank: Do not display disposed assets.

1: Display disposed assets.

9. Display Meters Allowed
Specify whether the system displays only the equipment that allows meters when scheduling preventive maintenance. Values are:

Blank: Display all.

1: Display only equipment that allows meters.

10. Responsible Business Unit
Specify the default responsible business unit.

The system uses this default when searching for equipment records.

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11. Location

Specify the default location.

The system uses this default when searching for equipment records.

12. Equipment Status

Enter a value from UDC 12/ES (Status or Disposal Code) that specifies the default equipment status. The system uses this default when searching for equipment records.

13. Company

Specify the default company. The system uses this default when searching for equipment records.

Categories

1. Major Accounting Class

Enter a value from UDC 12/C1 (Major Accounting Class) that specifies the category code that classifies assets into accounting classes.

The system uses this default when searching for equipment records.

2. Major Equipment Class

Enter a value from UDC 12/C2 (Major Equipment Class) that specifies the category code that classifies assets into groups or classes.

The system uses this default when searching for equipment records.

3. Manufacturer

Enter a value from UDC 12/C3 (Manufacturer) that specifies the category code that classifies assets into groups or classes.

The system uses this default when searching for equipment records.

4. Model Year

Enter a value from UDC 12/C4 (Model Year) that specifies the category code that classifies assets into groups or classes.

The system uses this default when searching for equipment records.

5. Usage Miles or Hours

Enter a value from UDC 12/C5 (Usage Miles or Hours) that specifies the category code that classifies assets into groups or classes.

The system uses this default when searching for equipment records.

6. Category Code 6

Enter a value from UDC 12/C6 (Equipment Code) that specifies the category code that classifies assets into groups or classes.

The system uses this default when searching for equipment records.

7. Category Code 7

Enter a value from UDC 12/C7 (Category Code 7) that specifies the category code that classifies assets into groups or classes.

The system uses this default when searching for equipment records.

8. Category Code 8

Enter a value from UDC 12/C8 (Division) that specifies the category code that classifies assets into groups or classes.

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The system uses this default when searching for equipment records.

9. Category Code 9

Enter a value from UDC 12/C9 (Category Code 9) that specifies the category code that classifies assets into groups or classes.

The system uses this default when searching for equipment records.

10. Rate Group

Enter a value from UDC 12/C0 (Rate Group) that specifies the category code that groups similar items for billing.

The system uses this default when searching for equipment records.

Process

1. Update Children Current Meters

Specify whether the system automatically updates the current meters of child assets when updating the parent's current meter. Values are:

Blank: Do not update current meters of child assets.

1: Update current meters of child assets.

2. Update Children Original Meters

Specify whether the system updates the original meter of the child asset when you update the original meter of the parent asset.

The system updates the original meter of the child only if both the parent and the child assets have no original meter readings. If you leave this processing option blank, the original meter reading of the parent never updates the original meter reading of the child. Values are:

Blank: Do not update the child meter.

1: Update the child meter.

Versions

1. Update PM Schedule (R12807) Version

Enter the version of Update PM Schedule Status (R12807) for the system to use when updating meters. If you leave this processing option blank, the system does not update PM schedules.

2. Cost Summary (P122101) Version

Specify the version of the Cost Summary program (P122101) that the system uses.

Blank: ZJDE0002

Edits

1. Tolerance Level

Specify whether the system displays a tolerance level warning.

Enter the specific percentage difference in meter readings that the system uses to signal the warning. If you leave this processing option blank, the system does not check for tolerance levels and does not display a tolerance level warning.

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Entering Meter Readings for a Piece of Equipment

Access the Meter Readings form.

Meter Readings

✓   🔍   ✕   ⯐ Form   ⯐ Row   ⚙ Tools

| General | Equipment | Codes |

Skip to Description	*	Thru Date/Period 09/11/15
Resp. Business Unit	*	Location *
Skip to Equipment	24900	

Meter Display

☐ Odometer   ☐ Fuel Meter   ☑ Hour Meter   ☐ Meter 4   ☐ Meter 5   ☐ Meter 6

Records 1 - 10   ›   ⟩|

	✎	Equipment Number	Asset Description	Hour Meter Current Reading	Hour Meter New Reading	Hour Meter Net Increase
⦾		31122	Spare Exhaust Fan			
⦾		31181	Paint Booth III			
⦾		31430	Phone Switch			
⦾		31448	Phone Mail			
⦾		31456	Phone Switch			

Inventory Number

Enter a number that the system assigns to an item. It can be in the short, long, or third item number format.

Display Children

Enter a code that specifies whether you want children (components) to appear with their associated parent assets.

The balance of this statement as printed is deleted. Values are:

On: Display both children and parent assets.

Off: Display only parent assets.

Display Disposed

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Enter a code that specifies whether to display disposed assets. Values are:

On: Display all selected assets.

Off: Do not display disposed assets.

Display Meters Allowed

Enter a code that specifies whether to display only the equipment that allows meters when scheduling preventive maintenance. Values are:

On: Display only equipment that allows meters.

Off: Display all.

Major Accounting Class

Enter a value from user-defined code (UDC) table 12/C1 (Major Accounting Class) that determines the accounting class category code.

You use this accounting category code to classify assets into groups or families, for example, 100 for land, 200 for vehicles, and 300 for general office equipment.

You should set up major class codes that correspond to the major general ledger object accounts to facilitate the reconciliation to the general ledger.

> **Note:** If you do not want to use the major accounting class code, you must set up a value for blank in the UDC table.

Major Equipment Class

Enter a value from UDC 12/C2 (Major Equipment Class) that is used to classify assets into groups or families.

You use the equipment category code as a subclass to further define the accounting class. For example, within the accounting class for general office equipment, you might set up UDC **310** for copy equipment, **320** for projectors, and **330** for typewriters.

> **Note:** If you do not want to use the major equipment class, you must set up a value for blank in the UDC table.

Manufacturer

Enter a value from UDC 12/C3 (Manufacturer) that classifies assets into groups or families.

You use the manufacturer category code to further define subclass codes. For example, you can define an International Harvester, single-axle within the subclass for trucks.

Model Year

Enter a value from UDC 12/C4 (Model Year) that classifies assets into groups or families.

You use the model-year category code to further define the subclass codes. For example, you can define a 1990 International Harvester, single-axle within the subclass for trucks.

Usage Miles or Hours

Enter a value from UDC 12/C5 (Usage Miles or Hours) that classifies assets into groups or families.

You use the usage category codes to further define the subclass codes.

Category Code 6

Enter a value from UDC 12/C6 (Equipment Code) that classifies assets into groups or families.

You use this code to further define the subclass codes.

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Rate Group

Enter a value from UDC 12/CO (Correct Information) that groups similar items for billing.

If you use JD Edwards EnterpriseOne Capital Asset Management (CAM), you must use this category code for rate-group purposes only.

Entering Speed Meter Readings

This section provides an overview of speed meter readings and discusses how to:

- Set processing options for the Speed Meter Readings program (P12120U).

- Enter speed meter readings.

Understanding Speed Meter Readings

The Speed Meter Readings program (P12120U) enables you to quickly enter meter readings for multiple pieces of equipment. You use processing options and check boxes to determine which meters you want to display. You can enter each meter reading either as a net change or as a current reading.

Entering meter readings for the same pieces of equipment in the same order on a routine basis is a common practice. To do this, you can use the Equipment Templates program (P12121) to set up the template for the applicable equipment in the order that you select. Program P12121 is discussed in a separate topic.

Form Used to Enter Speed Meter Readings

Form Name	FormID	Navigation	Usage
Speed Meter Readings	W12120UA	Equipment Information (G1311), Speed Meter Readings Perform one of these actions: To use an existing equipment template, enter the name in the Template Name field and select Load Template from the Form menu. Enter meter information for each record. Enter a template name and enter meter information for each equipment record. To save the equipment and sequence information to the template for reuse,	Enter speed meter readings.

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Form Name	FormID	Navigation	Usage
		select Save Template from the Form menu. This enables you to use the template again without having to set it up in the Equipment Templates program.	

Setting Processing Options for the Speed Meter Readings Program (P12120U)

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

Defaults

1. Display Odometer Readings

Specify whether the program displays the odometer reading fields for entry. Values are:

Blank: Do not display odometer readings.

1: Display odometer readings.

2. Display Fuel Readings

Specify whether the program displays the fuel meter reading fields for entry. Values are:

Blank: Do not display fuel meter readings.

1: Display fuel meter readings.

3. Display Hour Readings

Specify whether the program displays the hour meter reading fields for entry. Values are:

Blank: Do not display hour meter readings.

1: Display hour meter readings.

4. Display Meter 4 Readings

Specify whether the program displays the meter 4 reading fields for entry. Values are:

Blank: Do not display meter 4 readings.

1: Display meter readings.

5. Display Meter 5 Readings

Specify whether the program displays the meter 5 reading fields for entry. Values are:

Blank: Do not display meter 5 readings.

1: Display meter readings.

6. Display Meter 6 Readings

Specify whether the program displays the meter 6 reading fields for entry. Values are:

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Blank: Do not display meter 6 readings.

1: Display meter readings.

7. Equipment Template Name

Specify the default equipment template name. The system assigns this value to the Template Name field upon form entry.

Process

1. Update Children Current Meters

Specify whether the system automatically updates the current meters of child assets when updating the parent's current meter. Values are:

Blank: Do not update current meters of child assets.

1: Update current meters of child assets.

2. Update Children Original Meters

Specify whether the system updates the original meter of the child asset when you update the original meter of the parent asset.

The system updates the original meter of the child only if both the parent and the child assets have no original meter readings. Values are:

Blank: Do not update original meters of child assets.

1: Update original meters of child assets.

3. Auto Load From Equipment Template

Specify whether the system automatically loads the grid from the equipment template upon form entry.

This option works with the Equipment Template Name processing option. If the template name is not specified in the processing option, the system does not automatically load the grid. Values are:

Blank: Do not automatically load the grid.

1: Automatically load the grid.

Versions

1. Update PM Schedule (R12807) Version

Specify which version of the Update PM Schedule Status program (R12807) the system uses when updating PM schedules. If you leave this processing option blank, the system does not update PM schedules

Edits

1. Tolerance Level

Specify whether the system displays a tolerance level warning.

Enter the specific percentage difference in meter readings that the system uses to signal the warning.

For example, if you enter **5** in this field, then the system issues a warning if the new net increase amount differs by more than 5 percent from the net increase amount of the last meter entry. If you leave this processing option blank, the system does not check for tolerance levels.

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Entering Speed Meter Readings

Access the Speed Meter Readings form.

Template Name

Enter a code that specifies the unique equipment template to use.

This template is used in the Meter Reading functionality.

Co (company)

Enter a code that identifies a specific organization, fund, or other reporting entity.

The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.

> **Note:** You can use company 00000 for default values such as dates and automatic accounting instructions. You cannot use company 00000 for transaction entries.

Creating Equipment Templates for Speed Meter Readings

This section provides an overview of equipment templates for speed meter readings and lists the forms that are used to create equipment templates for speed meter readings.

Understanding Equipment Templates for Speed Meter Readings

Entering meter readings for the same pieces of equipment in the same order on a routine basis is a common practice. To do this, you can use the Equipment Templates program (P12121) to set up the template for the applicable equipment in the order that you select.

When you load the template into the speed meter readings detail area, the template maintains the order of display for the equipment records. You can add and delete templates, as well as the equipment records in a template.

Forms Used to Create Equipment Templates for Speed Meter Readings

Form Name	FormID	Navigation	Usage
Work With Equipment Templates	W12121A	Equipment Information (G1311), Equipment Templates	Add a template.

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Form Name	FormID	Navigation	Usage
		Plant & Equipment Management Setup (G1341), Equipment Templates	
Equipment Template Revisions	W12121B	Click Add on the Work With Equipment Templates form.	Enter a template name, template description, and meter type.
Equipment Template Listing Revisions	W12121C	Locate the template that you created on the Work With Equipment Templates form, and select Equip Listing from the Row menu.	Enter each piece's sequence and description in the template, and whether it is active and should, therefore, be included when you are using the template.

Working with Meter Estimates

This section provides an overview of meter estimates and discusses how to:

- Set processing options for the Meter Reading Estimates program (P1306).
- Set up meter estimates.
- Update meter readings based on estimates.
- Set processing options for the Update Meter Estimates program (R13806).

Understanding Meter Estimates

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

Form Used to Work with Meter Estimates

Form Name	FormID	Navigation	Usage
Meter Estimates	W1306B	Equipment Information (G1311), Meter Estimates	Set up meter estimates. You set up meter estimates for each piece of equipment for which you want to update

Form Name	FormID	Navigation	Usage
			meters according to estimated meter amounts.

Setting Processing Options for the Meter Reading Estimates Program (P1306)

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

Versions

1. Update Meter Estimates (R13806) Version

Specify the version that the system uses for the Update Meter Estimates program (R13806).

Blank: XJDE0001

Defaults

1. Display Meters Allowed

Specify whether the system displays only the equipment that allows meters when scheduling preventive maintenance. Values are:

Blank: Display all.

1: Display only the equipment that allows meters.

Setting Up Meter Estimates

Access the Meter Estimates form.

ORACLE

Meter Estimates

✓   ○   ✕   ≡ Row   ⚙ Tools

| General | Codes |

Skip to Description   [   ]   Company   [*]

Resp. Business Unit   [*   ]   Location   [*   ]

Skip to Equipment   [24900   ]

Type/Subledger   [   ] [   ]   ☐ Display Meters Allowed

Records 1 - 10   ⟩   ⟩|

	🖉	Equipment Number	Description	Estimated Hour Meter	Estimated Mile Meter	Estimated Fuel Meter	Estimated Meter 4
⦿		24900	Forklift				
○		31122	Spare Exhaust Fan				
○		31181	Paint Booth III				
○		31430	Phone Switch				
○		31448	Phone Mail				
○		31456	Phone Switch				

Updating Meter Readings Based on Estimates

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

You can use processing options to specify whether the system updates the meters of components or of parent equipment only, and whether to print a report of the updated equipment. Do not select the option to update the meter reading of component assets if you have set data selections to update meters for pieces of equipment that are components of other equipment.

To ensure that the system regularly updates the meter readings for equipment for which you have set up meter estimates, run Update Meter Estimates (R13806) as part of the unattended operations.

Select Equipment Information (G1311), Update Meter Estimates.

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> **Note:**
>
> - *JD Edwards EnterpriseOne Tools Runtime Administration Guide* .

Setting Processing Options for the Update Meter Estimates Program (R13806)

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

Process

1. Update Account

Specify which statistical account the system updates. Values are:

Blank: Update the hour meter (AT00) (default).

1: Update the fuel meter (FMA).

2: Update the mileage meter (FMB).

3: Update the Meter 4 (FMF).

4: Update the Meter 5 (FMG).

5: Update the Meter 5 (FMH).

2. Component Asset

Specify whether the system updates the meter readings of assets that are components of a parent asset. Values are:

Blank: Do not update the meter reading.

1: Update the meter reading.

Print

1. Updated Assets

Specify whether the system prints a report of updated assets. Values are:

Blank: Do not print a report of updated assets.

1: Print a report of updated assets.

G/L Date

1. G/L Date

Specify the general ledger date that the system uses when updating the F0911 table and the Asset Account Balances File table (F1202). If you leave this processing option blank, the system date is used.

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Reviewing and Revising Meter Readings

This section provides an overview of reviewing meter readings and lists the forms that are used to review meter reading information.

Understanding Reviewing Meter Readings

You can review the meter readings for any piece of equipment. You can also specify the time period for which you want to review meter readings. After you review the meter readings for a piece of equipment, you can access Meter Readings to revise the individual meter readings for the equipment.

Forms Used to Review and Revise Meter Readings

Form Name	FormID	Navigation	Usage
Meter Reading Inquiry	W13210A	Equipment Information (G1311), Meter Inquiry	Set up meter estimates for each piece of equipment for which you want to update meters according to estimated meter amounts.
Meter Readings	W12120A	Select Meter Readings from the Form menu on the Meter Reading Inquiry form.	Revise meter readings for any piece of equipment.

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15   Working with Preventive Maintenance Schedules

Understanding PM Schedules

Use the programs on the JD Edwards EnterpriseOne Plant & Equipment Maintenance menu (G1315) to plan, monitor, and complete routine maintenance operations to minimize equipment breakdowns and unscheduled repairs.

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

You should be familiar with the following terms and concepts that are related to the PM cycle.

Service Type

You define service types to describe individual preventive maintenance tasks. You can define as many service types as you need. You can set up service types to apply to a particular piece of equipment or a class of equipment. Examples of service types include:

- 250-hour inspection
- Clutch adjustment
- Lubricate ventilation fan
- 10,000-hour engine rebuild

PM

A PM refers to one or more service types that are scheduled to be performed for a piece of equipment. You typically specify that a PM be performed at a predefined point in time. The point in time can be based on days, date, or when a piece of equipment accumulates a predefined number of statistical units, such as hours, miles, and so on. You identify how many units have accumulated for each piece of equipment by periodically entering equipment meter readings.

Preventive Maintenance Schedule

You create one PM schedule for each piece of equipment for which you want to perform PMs. The PM schedule defines which service types apply to a piece of equipment. The PM schedule also defines the service interval for each service type. A service interval refers to the frequency at which the service types are performed.

For example, you could create a PM schedule for a piece of equipment that schedules a belt inspection every 5,000 hours and a mandatory belt replacement every 20,000 hours.

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PM Status

When the system creates a record for a PM, it assigns an initial status of 01 (Maintenance Task Defined). You define other statuses to indicate the particular steps that a PM goes through before it is completed.

When you complete a PM, the system assigns it a status of 99 (Maintenance Complete).

Primary Procedures

Although the level of complexity of the PM cycle differs from company to company, a typical PM cycle includes these procedures:

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

PM Schedule Creation for Each Piece of Equipment

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

PM Scheduling

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

PM Completion

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

Understanding PM Cycle Events

This diagram illustrates the progression of events in a typical maintenance cycle:

Add Equipment Item

```
Equipment Master
    Set up Maintenance Schedule
```

```
PM Schedule
    Model Work Orders and Procedures
    Update PM Status and
    Generate PM Work Orders
```

```
PM Schedule Status
    Create Work Order
```

```
Work Order
    Technician Performs Maintenance
    Update Maintenance Schedule as
    Completed
```

```
Completed PM
```

```
Meter Readings
Payroll Time Card
Equipment Time Entry
```

```
Model Work Order
    Parts List
    Instructions
```

Understanding PM Process Flow

This diagram illustrates the progression of a typical PM process:

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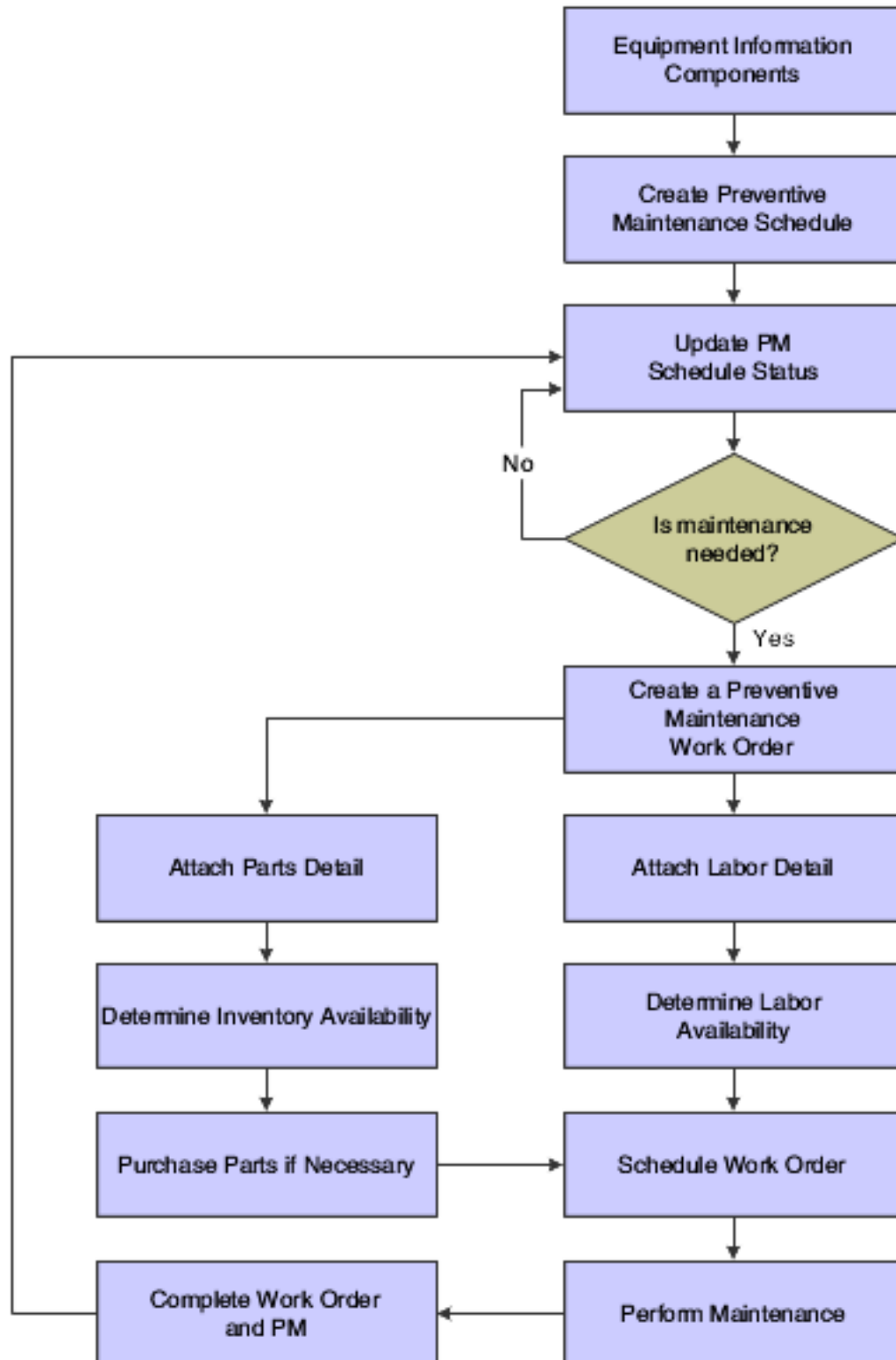
Common Elements Used in This Chapter

Service Type

Enter a user-defined code that describes the preventive maintenance service to be performed or the service type for the work order.

Examples of codes include **CLUTCH** for adjust clutch, **OIL** for change oil, and **10H** for 10-hour service.

Creating a PM Schedule

This section provides an overview of PM schedule creation, lists prerequisites, and discusses how to create a PM schedule.

Understanding PM Schedule Creation

You create a PM schedule for each piece of equipment that you want to maintain. On each PM schedule, you indicate all of the service types that you want to associate with the piece of equipment. You also specify the rules governing how and when the service types are performed. Service types can be for regularly scheduled maintenance as well as for unscheduled maintenance tasks, such as cleaning on an as-needed basis or repairing at the point of an equipment failure alert.

In addition, you can use PM schedules and service types to signal warranty service; equipment messages such as warnings and problem reports; and other planning events that are not necessarily associated with preventive maintenance tasks, such as license renewals and recertifications.

Prerequisites

Verify that these items are set up:

- Service types codes from the user-defined code (UDC) table 12/ST (Service Types).
- Work order priority codes from UDC 00/PR (Work Order Priority).
- Standard procedures.

Before you complete the tasks in this section:

- Create equipment records for all of the pieces of equipment that you want to maintain.
- Set up the parts lists and work order instructions.
- Create a model work order.

Forms Used to Create a PM Schedule

Form Name	FormID	Navigation	Usage
Work with Equipment PM Schedule	W1207A	Plant & Equipment Maintenance (G1315), Equipment PM Schedule Daily Condition-Based Maintenance Processing (G13CBM10), Equipment PM Schedule	Add an equipment number.
Equipment PM Schedule	W1207B	Enter an equipment number and click Add on the Work with Equipment PM Schedule form.	Create a PM schedule. Enter the service type and schedule type, and then complete the remaining optional fields.
PM Classification	W1207F	Select PM Classification from the Form menu on the Equipment PM Schedule form.	Complete optional fields such as Maintenance Priority, Downtime, and Business Unit.

Creating a PM Schedule

Access the Equipment PM Schedule form.

> **Note:** The schedule intervals that are associated with the six meter readings will be disabled if the Allow Meter Schedules option is not selected on the equipment master record.

Schedule Type

Enter a value from UDC 13/ST (Schedule Type) that indicates the type of maintenance schedule. Values are:

Blank: Interval-Based Schedule. This type of preventive maintenance schedule uses a service interval to determine when maintenance should be performed. Examples include an oil change that occurs every 3000 miles or an inspection that occurs every 30 days.

1: Unscheduled Maintenance. This type of preventive maintenance schedule entails maintenance that is performed on an ad hoc basis. You use the Work With Unscheduled Maintenance program (P13UM) to specify when the scheduled maintenance should be performed. Examples include replacing a windshield or washing a vehicle.

2: Condition-Based Schedule. This type of preventive maintenance schedule uses an alert level, indicated by the condition of the equipment, to determine when maintenance should be performed. Examples include replacing tires based on their tread depth or replacing an electric motor that is overheating.

Service Hours

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Enter the hour interval for maintenance.

For example, tractors typically run 100 hours before needing an oil change. This field is the number of hours in the interval between maintenance occurrences.

Service Miles

Enter the mileage interval for maintenance.

This field is the number of miles in the interval between maintenance occurrences.

Service Fuel

Enter the fuel interval for maintenance.

This field is the amount of fuel in the interval between maintenance occurrences.

Service Meter 4

Enter the meter 4 interval for maintenance.

This field is the interval between maintenance occurrences.

Service Meter 5

Enter the meter 5 interval for maintenance.

This field is the interval between maintenance occurrences.

Service Meter 6

Enter the meter 6 interval for maintenance.

This field is the interval between maintenance occurrences.

Service Days

Enter the number of days to elapse before you schedule maintenance.

You can enter a service interval based on service days and schedule date. If you enter both service days and a schedule date, the system schedules the maintenance to come due based on the schedule date.

The system calculates subsequent schedule dates for maintenance based on the last completed date in conjunction with the service days interval.

Schedule Date

Enter the date that you want to receive a reminder message about an asset.

This is the future date on which the scheduled maintenance is due. You can enter a service interval based on the schedule date and service days. If you enter both a schedule date and service days, the system schedules the maintenance to come due based on the schedule date that you indicate.

Subsequent schedule dates for maintenance are calculated based on the last completed date in conjunction with either the service days interval or frequency indicator.

Frequency Indicator

Indicate the frequency at which the system schedules maintenance when used in conjunction with Schedule Date.

When maintenance is completed, the system automatically schedules the next maintenance according to the value that you enter in this field. Values are:

Blank: No frequency indicator.

1: Same date each month.

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2: Last date each month.

3: Same date each quarter.

4: Same date each year.

5: Same day each week.

6: Semiannually (same date at six month intervals).

Multiple W.O. Code (multiple work order code)

Enter a code to determine whether maintenance service types can be rescheduled and can come due again before the maintenance task for the originally scheduled service type has been completed. Values are:

Blank: One cycle (default). Maintenance is not rescheduled until the original maintenance task has been completed.

1: Multiple cycle with multiple work orders. When the service type has come due, it is automatically rescheduled to come due again regardless of whether the original maintenance is completed. Multiple work orders can accrue.

2: Multiple cycle. When the service type has come due, it is automatically rescheduled to come due again regardless of whether the original maintenance is completed. Only one work order can accrue.

3: Maintenance route. The Update PM Schedule program assigns the Maintenance route code to PM schedules that are generated through maintenance routes. These PM schedules are not repeated in the PM cycle. Maintenance tasks for all equipment indicated in the maintenance route are performed under a single work order.

> **Note:** This value is a system-generated value. You should not manually enter a value of **3** in the Multiple W.O. Code field.

4: Warranty. A code that indicates that the equipment is under warranty. The system provides a warning on the Work Order Inventory Issues form and the Purchase Request form (when accessed from the Work Order Parts Detail form).

When a PM that includes warranty service types is completed, the system includes the warranty service in the PM history record, but does not reschedule the warranty service types.

Alert Level

Enter a value from UDC 13/AL (Alert Level) that indicates the functional status of a piece of equipment, as assessed by a condition-based maintenance system.

For maintenance schedules that are condition based, the JD Edwards EnterpriseOne Plant and Equipment Management system uses this code to determine whether maintenance is due.

> **Note:** The system does not typically update the Alert Level field from this form. Typically, you manually update the alert level from the PM Backlog (P12071) program or automatically by a condition-based alert that comes into the system.

Last Completed Date

Enter the date of last maintenance.

Model WO (model work order)

Enter a model work order.

Procedure

Enter a list of valid codes for a specific UDC list.

Occurrences

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Enter the estimated number of occurrences per year for the service type.

The PM Projections program uses information from this field, in combination with the last completed date, to project future schedule requirements.

You can use processing options to automatically calculate the estimated occurrences, based on:

- One year of PM history.
- Two years of PM history.
- Inception-to-date PM history.

If you use processing options to calculate the estimated occurrences, you cannot manually update this field.

Copying a PM Schedule (Release 9.2 Update)

You can use the Copy PM Schedule feature to copy PM schedules from one piece of equipment to another. The system allows you to select and copy one or more service type from one piece of equipment schedule to another.

Forms Used to Copy a PM Schedule

Form Name	Form ID	Navigation	Usage
Work With Equipment PM Schedule	W1207A	Plant & Equipment Maintenance (G1315), Equipment PM Schedule OR Daily Condition-Based Maintenance Processing (G13CBM10), Equipment PM Schedule	Copy a PM schedule from one piece of equipment to another.

Copying a PM Schedule from an Equipment

Access the Work With Equipment PM Schedule form.

Equipment Number
Enter the equipment number of the asset from which you want to copy the schedule and click Find.

Select one or more service types from the records list and click Copy.

To Equipment
Enter the equipment number of the destination asset to which you want to copy the records and click OK.

> **Note:** The To Equipment field is displayed in the Copy PM group box only after you search for the equipment, select records to copy, and click Copy.

The system copies all valid records to the destination equipment schedule and displays the updated PM schedule of the destination equipment. If any of the selected service is already added to the destination equipment schedule or if maintenance routes exist for the service, the system displays an error.

Linking Service Types

This section provides an overview of linking service types, and discusses how to link service types.

Understanding Linking Service Types

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

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

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

You use threshold percentages to specify when the system should include the maintenance tasks for linked service types when it schedules the primary service type. A threshold percentage is the percentage of a service interval that you define as the initiation point for maintenance to be scheduled. For example, you might set up a service type to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.

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

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

Forms Used to Link Service Types

Form Name	FormID	Navigation	Usage
Work with Equipment PM Schedule	W1207A	Plant & Equipment Maintenance (G1315), Equipment PM Schedule	Locate a service type.

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Form Name	FormID	Navigation	Usage
Associated Service Types	W1207E	Select a service type on the Work with Equipment PM Schedule form, and then select Associations from the Row menu.	Link service types.

Linking Service Types

Access the Associated Service Types form.

Separate Work Order

Enter a code that determines whether a separate work order is used when grouping maintenance tasks together. Values are:

1: The maintenance for separate tasks is done under separate work orders.

2: The maintenance for separate tasks is done under one work order or the maintenance for one task renders the maintenance for the other tasks unnecessary. If you are combining work orders, the system assigns a canceled work order status to any outstanding work order. For example, if you combine work orders for a 250-hour service and a 500-hour service, the system assigns a canceled work order status to the work order for the 250-hour service.

> **Note:** You can enter **Y** for **1** or **N** for **2.**

Threshold Percent

Enter a percentage measure that indicates how soon a piece of equipment needs maintenance.

This percentage is based on the greater of the actual date, miles, hours, or fuel consumption. A percentage of 090 indicates that the piece of equipment is almost due for maintenance. A percentage greater than 100 indicates that maintenance is past due.

The system uses this percentage to determine when to initiate the maintenance schedule. If the maintenance schedule is greater than or equal to the threshold percent, the schedule becomes due.

Miles, hours, and fuel are only examples of statistical units. You can define other statistical units that are appropriate to the organization within the automatic accounting instructions for JD Edwards EnterpriseOne Plant and Equipment Management.

> **Note:** The Threshold Percent field is not used for condition-based schedules. Condition-based schedules are initiated only by their alert-level value.

Threshold Days

Enter a daily measure of how close an equipment maintenance line item is to being eligible for being performed, taking into account the greater of the actual date, miles, hours, or fuel consumption compared to the threshold date, miles, hours, or fuel consumption.

> **Note:** Miles, hours, and fuel are only examples of statistical units. You can define other statistical units appropriate to the organization within the automatic accounting instructions for JD Edwards EnterpriseOne Plant and Equipment Management.

Creating a Maintenance Route

This section provides an overview of maintenance routes, lists prerequisites, and lists the forms that are used to create a maintenance route.

Understanding Maintenance Routes

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

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

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

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

You complete the work order for a maintenance route by accessing the work order directly from Work With Work Orders (P48201) or by using Preventive Maintenance Backlog (P12071).

When you complete the work order, the system indicates a completed status for all of the pieces of equipment that are included in the maintenance route. Use this method when you have completed the maintenance task for all of the pieces of equipment.

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

You can create a maintenance route by using a virtual or logical piece of equipment, such as a production line or department. The logical equipment encompasses the equipment that you want to include in the route. If you use a logical piece of equipment as the basis for a maintenance route, you must create an equipment master for the logical piece of equipment.

You use Preventive Maintenance Backlog to specify individual pieces of equipment for which you want to indicate a status of complete. This action is useful if you have completed the maintenance task for some of the equipment in a maintenance route but do not want to indicate a status of complete for other equipment. For example, a piece of equipment that is scheduled for inspection might not be available on the date of the inspection.

When you use the Preventive Maintenance Backlog program to complete individual PMs, the status of the work order remains open. To complete the work order for a maintenance route, you must manually change the work order status.

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Prerequisites

Before you complete the tasks in this section:

- Set up PM service types for maintenance route tasks.

- Create a PM schedule that includes the service type or types for which you want to establish maintenance routes.

Forms Used to Create a Maintenance Route

Form Name	Form ID	Navigation	Usage
Work with Equipment PM Schedule	W1207A	Plant & Equipment Maintenance (G1315), Equipment PM Schedule	Locate service types.
Equipment Routes	W1207D	Select a service type on the Work with Equipment PM Schedule form, and then select Routes from the Row menu.	Enter the equipment number for each piece of equipment that you want to include on the maintenance route.

Working with Model PM Schedules

This section provides an overview of model PM schedules and discusses how to set processing options for the Equipment PM Schedule program (P1207).

Understanding Model PM Schedules

Use model PM schedules to store preventive maintenance schedule information that you want to apply to multiple pieces of equipment. You create model PM schedules that are based on combinations of equipment category codes. When you need to create PM schedules for equipment, you can use a model PM schedule that contains the appropriate category codes.

The system stores model PM schedules in a table that it accesses when you apply a particular model to a piece of equipment. When you apply a model PM schedule to a piece of equipment, the system creates a unique record that you can modify to satisfy the maintenance requirements of that equipment. The model PM schedule remains unaltered and can be applied to other equipment as needed.

You create model PM schedules when you have multiple pieces of similar equipment for which a single PM schedule can apply. You create model PM schedules based on combinations of equipment category codes. After you apply a

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model PM schedule to a piece of equipment, you can modify the schedule to satisfy the particular requirements of the equipment without affecting the model.

After you create a model PM schedule, you can apply it to any piece of equipment, based on the category codes that you set up. After you apply a model PM schedule to a piece of equipment, you can modify the PM schedule to satisfy any unique maintenance requirements of the equipment. For example, you can delete a service type from the PM schedule for the equipment.

Forms Used to Work with Model PM Schedules

Form Name	FormID	Navigation	Usage
Work With Equipment PM Schedule	W1207A	Plant & Equipment Maintenance (G1315), Equipment PM Schedule Select Model PM from the Form menu.	Access the Model PM.
Work with Model PM Schedules	W1207C	Select Model PM from the Form menu on the Work with Equipment PM Schedule form.	Select to add or copy a model PM schedule.
Model PM Schedule	W1207H	Click Add on the Work with Model PM Schedules form.	Complete the schedule information.
Equipment PM Schedule	W1207B	Select a service type on the Work with Equipment PM Schedule form, and click Select.	Modify the service type, and click OK to save the changes.

Setting Processing Options for the Equipment PM Schedule Program (P1207)

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

Default

1. Calculate Estimated Occurrences
Specify the time period that the system uses to calculate the estimated occurrences of preventive maintenance. Values are:

Blank: Do not calculate estimated occurrences.

1: Calculate estimated occurrences based on one year of preventive maintenance history.

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2: Calculate estimated occurrences based on two years of preventive maintenance history.

3: Calculate estimated occurrences based on preventive maintenance history from inception to the current date.

Versions

1. Work Order (P17714) Version
Specify the version that the system uses for the Work Order Revisions program (P17714).

Blank: ZJDE0003

Updating PM Schedule Status Information

This section provides an overview of updating PM schedule status information, lists a prerequisite, and discusses how to set processing options for the Update PM Schedule Status program (R12807).

Understanding Updating PM Schedule Status Information

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

Update PM Schedule Status (R12807) is a batch program. When you select Update PM Schedule Status, the system displays Work With Batch Versions - Available Versions before submitting the job for processing. When you run this program, the system automatically:

- Updates the current meter readings.

  Only the meters that are in use are displayed on the printed report.
- Calculates the current maintenance interval, based on the last maintenance performed.
- Calculates the percentage due based on all intervals that are defined on the PM schedule to determine whether the service is required.
- Checks the Allowed Meter Schedules flag on the equipment to determine whether to use the process meter calculations.
- Changes the status for each PM service type, if necessary.
- Generates PM work orders, if necessary.

When you update a PM for a maintenance route, the system creates a PM for each piece of equipment in the route, but it creates only one work order.

When you change or update a warranty PM service type to Complete, the system does not create a new PM cycle for that service type and piece of equipment.

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> **Note:** Depending on whether you specified multiple work orders on the PM schedule for a service type that is due to be performed, the system might create a new PM cycle, regardless of the status of the maintenance task. If you do not want the system to recycle the PM for the service type until previously scheduled maintenance has been completed, you must leave the Multiple Work Order field blank when you create or revise the PM schedule. Other values for this field enable the system to reschedule the maintenance task and accrue multiple work orders.

Prerequisite

Create model work orders.

See *Creating Model Work Orders*.

Select one of these navigations:

- For Capital Asset Management: Plant & Equipment Maintenance (G1315), Update PM Schedule Status.
- For Condition-Based Maintenance: Daily Condition-Based Maintenance Processing (G13CBM10), Update PM Schedule Status.

Setting Processing Options for the Update PM Schedule Status Program (R12807)

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

Defaults

1. Through Date

Specify the through date that the system uses when calculating the percentage due.

The system uses this date to determine whether the preventive maintenance schedule is due as of this through date.

Blank: System date

2. Days Added to Through Date

Specify the number of days by which you want the system to advance the through date.

The through date pertains to the first processing option in Update PM Schedule Status (R12807). For example, if you enter **30** in this field, the system advances the through date by 30 days.

> **Note:** If you leave the Through Date field blank in the processing options for Update PM Schedule Status, the system adds the days that you enter here to the current date.

3. From Status:

Specify the PM status range that the system uses to determine whether maintenance is due.

Blank: Use the default value for Data Dictionary Item MSTS.

4. To Status:

Specify the PM status range that the system uses to determine whether maintenance is due.

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Blank: Use the default value for Data Dictionary Item MSTS.

5. Status Change To

Specify the status to which the PMs change.

Blank: Status from maintenance rule.

6. Job Status Message Recipient

Specify the address book number of the recipient of job status messages that result from the Update PM Schedule Status program (R12807).

Blank: The system uses the address book number of the current user.

Print

1. Print Report

Specify whether the system prints the Update PM Schedule Status report (R12807). Values are:

Blank: Do not print the report.

1: Print the report.

2. Equipment Number Format

Specify which equipment number the system displays on the Update PM Schedule Status report (R12807). Values are:

1: Display the asset number.

2: Display the unit number.

3: Display the serial number.

Edit

1. Create Work Order

Specify whether the system creates work orders for qualifying maintenance items that have model work order numbers. Values are:

Blank: Do not create a work order.

1: Create a work order.

2. Work Order Start Date

Specific Start Date:

Specify a specific start date to use when creating assigned work orders.

> **Note:** If you enter a value for this processing option, the Default System Date, and Project the PM and WO Start Date processing options should be set to blank.

Default System Date:

Specify the date to use when creating assigned work orders. Values are:

Blank: Do not use the system date.

1: Use the system date.

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> **Note:** If you enter **1** for this processing option, the Specific Start Date, Project PM, and WO Start Date processing options should be set to blank.

Project the PM and WO Start Date:

Specify whether the system forecasts the start date for preventive maintenance and work orders. Values are:

Blank: Do not forecast the start date.

1: Forecast the start date.

3. Past Projected Dates

Specify whether the system allows projected start dates to be calculated as dates in the past. Values are:

Blank: Do not allow dates in the past.

If you leave this processing option blank and a past date is calculated, the system uses the system date.

1: Allow dates in the past.

4. Work Order Cross Reference

Specify the value for the work order cross-reference. Values are:

Blank: Equipment's immediate parent.

1: Equipment's top level parent.

2: Value from model work order.

5. Create Individual Resource Assignments

Specify an option to automatically create individual resource assignments based on the Assigned To (ANP) address book number on the new work order.

The system verifies that the address book number appears in the Resource Master table (F48310).

This processing option applies only when the Update PM Schedule Status program (R12807) creates a work order, not when the program updates an existing work order. Values are:

Blank: Do not create assignments.

1: Create assignments.

6. Work Center

Specify a work center for which the system generates only work orders for service types, the model work orders of which include the specified work center in their routing instructions.

When you specify a work center, the program does not generate work orders for service types that have come due, but whose model work orders do not include the specified work center in their routing instructions.

Blank: Do not screen service types.

7. Update Last Completed

Specify whether the system updates the last completed statistics for all selected records as of the last completed date. Values are:

Blank: Do not update the last completed statistics.

1: Update the last completed statistics.

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> **Note:** If you select to update the last completed statistics, use data selection to limit the updated records to only preventive maintenance records that are not complete. Doing so limits excessive processing time.

8. Estimated Occurrences

Specify how the system calculates estimated occurrences of a PM. Values are:

Blank: Do not calculate.

1: Calculate occurrences based on one year of PM history.

2: Calculate occurrences based on two years of PM history.

3: Calculate occurrences based on PM history from inception to date.

4: Do not calculate estimated occurrences (default).

9. Forecast Type

Specify the forecast type that the system uses to determine whether the assigned work order and labor detail created should be added to the schedule for crew scheduling. If this processing option is populated, the system will check the PM Projections (F13411) table using the asset number, service type, forecast type, and work order date to determine whether the work should be added to the schedule. If the record that is found in the PM Projections table indicates that the work should be added to the schedule, the document type will be checked against UDC 48/RL (Resource Level) to determine whether the schedule records are created at the work order or labor detail level.

> **Note:** If you have this processing option populated, you must be using the work order start date processing option that projects the work order and PM start date. You should not use the processing options that enable you to either enter a specific date or use the system date.

Versions

1. Work Order Parts Detail (P17730) Version

Specify the version that the system uses for the Work Order Parts Detail program (P17730).

Blank: ZJDE0002

2. Work Order Labor Detail (P17732) Version

Specify the version that the system uses for the Work Order Labor Detail program (P17732).

Blank: ZJDE0002

3. Work Order Revisions (P17714) Version (Release 9.2 Update)

Specify the version that the system uses for the Work Order Revisions program (P17714).

Blank: ZJDE0001

Changing the Status of PMs to Complete

This section provides an overview of changing the status of PMs to complete and discusses how to:

- Change the status of PMs to complete.

- Set processing options for the Preventive Maintenance Backlog program (P12071).

Understanding Changing the Status of PMs to Complete

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

- Maintains a record of the PM with a status of 99 (complete) or 98 (canceled).

- Generates a new PM with a status of 01 and begins a new PM cycle (depending on the value of the multiple work order flag on the PM schedule).

> **Note:** The system does not begin a new PM cycle for warranty service types or maintenance routes.

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

You can use processing options to specify whether you want the system to display actual meter readings or lifetime maintenance amounts on the preventive maintenance schedule. The actual meter reading is the number that appears on the physical meter that is located on a piece of equipment. The lifetime maintenance amount is the total lifetime use of the equipment. In cases such as meter changes or meter rollovers, the lifetime maintenance amount is not the amount that is displayed on the meter. If you select an actual meter reading for this processing option, you must enter the meter reading as it appears on the actual meter. The system calculates the lifetime maintenance amount from this amount.

When you enter a value in the Status field in the processing options, the system attempts to update the work order status with the PM status if the value is valid. If the value is not valid, no update occurs to the work order status.

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

You can globally update multiple PMs when status, completion date, and employee responsible for the PM work order are the same. After you have narrowed the search to a specific group of PMs, select the Global Updates tab, enter values in these fields, and then click OK:

- PM Status

- Completion Date

- Employee

The system updates all selected PMs. In addition, when you update the Employee field, the system updates the Assigned To field on the PM work order.

Form Used to Change the Status of PMs to Complete

Form Name	FormID	Navigation	Usage
PM Backlog	W12071A	Plant & Equipment Maintenance (G1315), PM Backlog Select the General tab. Select the PM Schedule tab.	Change the status of PMs to complete.

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Form Name	FormID	Navigation	Usage

Changing the Status of PMs to Complete

Access the PM Backlog form.

General

Assigned WO

Enter the work order number that is related to a particular equipment maintenance line item.

The system assigns this number from next numbers.

PM Schedule

Maintenance Status

Enter a value from UDC 12/MS (Maintenance Status) that indicates the maintenance status of a piece of equipment, such as **50** for maintenance due or **60** for waiting for parts.

> **Note:** Status code **98** is reserved for canceled maintenance. Status code **99** is reserved for completed maintenance. Status code **01** (default) is reserved for initial maintenance setup.

% of Schedule Due (percent of schedule due)

Enter a percentage measure that indicates how close a piece of equipment is to requiring maintenance.

This percentage is based on the greater of the actual date, miles, hours, fuel consumption, meter 4, meter 5, or meter 6 compared to the threshold date, miles, hours, fuel consumption, meter 4, meter 5, or meter 6. A percentage of 090 means that the piece of equipment is 10 percent away from requiring maintenance. A percentage greater than 100 means that maintenance is past due.

Setting Processing Options for the Preventive Maintenance Backlog Program (P12071)

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

Defaults

1. Maintenance Status - From

Enter a value from UDC 12/MS (Maintenance Status) that specifies the beginning maintenance status in a range of maintenance statuses.

The system uses this default when searching for preventive maintenance schedules.

2. Maintenance Status - Thru

Enter a value from UDC 12/MS (Maintenance Status) that specifies the ending maintenance status in a range of maintenance statuses.

The system uses this default when searching for preventive maintenance schedules.

3. Service Type

Enter a value from UDC 12/ST (Service Types) that specifies the default service type.

The system uses this default when searching for preventive maintenance schedules.

4. Maintenance Due Percent - From

Specify the due percentage to use as the beginning in a range for the maintenance schedules.

The system uses this default when searching for preventive maintenance schedules.

5. Maintenance Due Percent - Thru

Specify the due percentage to use as the ending in a range for the maintenance schedules.

The system uses this default when searching for preventive maintenance schedules.

6. Downtime Required - From

Specify the amount to be used for the beginning downtime in a range of downtime required amounts.

The system uses this default when searching for preventive maintenance schedules.

7. Downtime Required - Thru

Specify the amount to be used for the ending downtime in a range of downtime required amounts.

The system uses this default when searching for preventive maintenance schedules.

8. Scheduled Date - From

Specify the beginning scheduled date in a range of scheduled dates.

The system uses this default when searching for preventive maintenance schedules.

9. Scheduled Date - Thru

Specify the ending scheduled date in a range of scheduled dates.

The system uses this default when searching for preventive maintenance schedules.

10. Completed Date - From

Specify the beginning completion date in a range of completion dates.

The system uses this default when searching for preventive maintenance schedules.

11. Completed Date - Thru

Specify the ending completion date in a range of completion dates.

The system uses this default when searching for preventive maintenance schedules.

12. Planned Start Date - From

Specify the beginning planned start date in a range of planned start dates.

The system uses this default when searching for preventive maintenance schedules.

13. Planned Start Date - Thru

Specify the ending planned start date in a range of planned start dates.

The system uses this default when searching for preventive maintenance schedules.

14. Location

Specify the default location business unit.

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The system uses this default when searching for preventive maintenance schedules. Enter a value from the Business Unit Master table (F0006).

15. Customer Number

Specify the default customer number.

The system uses this default when searching for preventive maintenance schedules. Enter a value from the Address Book table (F0101).

16. Site Number

Specify the default site number.

The system uses this default when searching for preventive maintenance schedules. Enter a value from the Address Book table (F0101).

17. Product Family

Specify the default product family.

The system uses this default when searching for preventive maintenance schedules. Enter a value from UDC 17/PA (Product Family).

18. Product Model

Specify the default product model.

The system uses this default when searching for preventive maintenance schedules. Enter a value from UDC 17/PM (Product Model).

Categories

1. PM Category Code 1

Enter a value from UDC 13/P1 (PM Category Code 1) that classifies preventive maintenance schedules.

The system uses this default when searching for preventive maintenance schedules.

2. PM Category Code 2

Enter a value from UDC 13/P2 (PM Category Code 2) that classifies preventive maintenance schedules.

The system uses this default when searching for preventive maintenance schedules.

3. Major Accounting Class

Enter a value from UDC 12/C1 (Major Accounting Class) that classifies assets into accounting classes.

The system uses this default when searching for preventive maintenance schedules.

4. Major Equipment Class

Enter a value from UDC 12/C2 (Major Equipment Class) that classifies assets into groups or classes.

The system uses this default when searching for preventive maintenance schedules.

5. Manufacturer

Enter a value from UDC 12/C3 (Manufacturer) that classifies assets into groups or classes.

The system uses this default when searching for preventive maintenance schedules.

6. Model Year

Enter a value from UDC 12/C4 (Model Year) that classifies assets into groups or classes.

The system uses this default when searching for preventive maintenance schedules.

7. Usage Miles or Hours

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Enter a value from UDC 12/C5 (Usage Miles or Hours) that classifies assets into groups or classes.

The system uses this default when searching for preventive maintenance schedules.

8. Category Code - F/A 6

Enter a value from UDC 12/C6 (Equipment Code) that classifies assets into groups or classes.

The system uses this default when searching for preventive maintenance schedules.

9. Category Code - F/A 7

Enter a value from UDC 12/C7 (Category Code 7) that classifies assets into groups or classes.

The system uses this default when searching for preventive maintenance schedules.

10. Category Code - F/A 8

Enter a value from UDC 12/C8 (Division) that classifies assets into groups or classes.

The system uses this default when searching for preventive maintenance schedules.

11. Category Code - F/A 9

Enter a value from UDC 12/C9 (Category Code 9) that classifies assets into groups or classes.

The system uses this default when searching for preventive maintenance schedules.

12. Category Code - F/A 10 (Rate Group)

Enter a value from UDC 12/C0 (Rate Group) that groups similar items for billing.

The system uses this default when searching for preventive maintenance schedules.

Display

1. Meter Readings Display

Specify how the system displays meter readings. Values are:

Blank: Display lifetime maintenance amounts.

1: Display current meter readings.

2. Global Update Display

Specify whether the system displays the Global Update tab on the PM Backlog form. Values are:

Blank: Display the Global Update tab.

1: Do not display the Global Update tab.

Process

1. Completion Date

Specify whether the system updates the completion date on the assigned work order. Values are:

Blank: Do not update the completion date.

1: Update the completion date.

2. Status

Specify whether the system updates the status on the assigned work order. Values are:

Blank: Do not update the status.

1: Update the status.

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3. Create Individual Resource Assignments

Specify whether to automatically create individual resource assignments, based on the Assigned To (ANP) address book number on the new work order.

The system verifies that the address book number appears in the Resource Master table (F48310).

This processing option applies only when the Update PM Schedule Status (R12807) creates a work order, not when the program updates an existing work order.

Values are:

Blank: Do not automatically create assignments.

1: Create assignments.

4. Update Alert Status - PM Canceled

Specify the alert status that the system uses to update any associated condition-based alerts when the preventive maintenance schedule is canceled (status 98) from the PM Backlog program (P12071).

Blank: The system does not update the alert status.

5. Update Alert Status - PM Completed

Specify the alert status that the system uses to update any associated condition-based alerts when the preventive maintenance schedule is completed (status 99) from the PM Backlog program (P12071).

Blank: The system does not update the alert status.

Versions

1. PM Update (R12807) Version

Specify the version that the system uses for the Update PM Schedule Status program (R12807).

Blank: XJDE0001

2. Equipment PM Schedule (P1207) Version

Specify the version of the Equipment PM Schedule program (P1207) that the system uses.

Blank: ZJDE0001

3. Work Order (P17714) Version

Specify the version that the system uses for the Work Order Revisions program (P17714).

Blank: ZJDE0003

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16 Creating Model Work Orders

Understanding Model Work Orders

When you set up maintenance tasks on an as-needed basis rather than a scheduled interval, you can create a work order to perform the tasks. The maintenance task that you use requires a model work order, which the system uses to create the work order for the unscheduled maintenance.

You can create model work orders to use with any service type on a PM schedule or for condition-based maintenance. When you create a model work order, the system assigns it a unique number. When you enter a model work order number for a service type, depending on how you set processing options on Update PM Schedule Status, the system automatically generates a new work order that is based on information from the model each time that the service type comes due. For example, the new work order might include the parts detail, labor detail, and any media objects that you attached to the model work order.

When you select Parts Detail from a model work order, the system accesses the Work With Bill of Material form. When you select Labor Detail, the system accesses the Work With Routing Operations form.

Prerequisites

Set up a PM service type for each unscheduled maintenance task and verify that the service type has no schedule date or service interval.

See *Creating a PM Schedule*.

For model work orders, you must enter a work order type that includes an X in the first position of the second description line for the user-defined code (UDC) table 00/TY (Work Order/ECO Type). When you search for work orders, you can specify that the system exclude model work orders from the search.

Verify that you have set up UDC 00/TY (Work Order/ECO Type) with at least one work order type that includes the X.

Creating Model Work Orders

This section discusses how to create model work orders.

Forms Used to Create Model Work Orders

Form Name	FormID	Navigation	Usage
Work with Work Orders	W48201F	Work Order Menu (G1316), Work Order Entry	Locate work orders.

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Form Name	FormID	Navigation	Usage
Work Order Revisions	W17714A	Click Add on the Work with Work Orders form, and specify the work order as a model.	Create a model work order.

Creating a Model Work Order

Access the Work Order Revisions form.

Type
Enter a value from UDC 00/TY (Work Order/ECO Type) that indicates the classification of a work order or engineering change order.

You can use work order type as a selection criterion for work order approvals.

The value that you enter must include an X in the first position of the second description line for the UDC that is indicated.

Setting Up Standard Parts Lists and Work Order Instructions

This section provides overview of standard parts lists and work order instructions and the Freeze Work Center Rates program (R30860), lists prerequisites, and discusses how to:

- Set up a standard parts list.
- Enter costing information for a work center.
- Update frozen costs for work centers.
- Set processing options for the Freeze Work Center Rates program (R30860).
- Set processing options for the Standard Work Order Instructions program (P3003).
- Set up standard work order instructions.

Note:

- *"Setting Processing Options for Bill of Material Revisions (P3002)" in the JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* .

- *"Creating Routing Instructions" in the JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* .

- *"Generating Resource Units Automatically" in the JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide* .

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Understanding Standard Parts Lists and Work Order Instructions

You can set up standard parts lists and standard work order instructions for work orders. You use a standard parts list when the maintenance task for which the work order applies is routine and repetitive, and when you have advance knowledge of the parts requirements.

For example, suppose that you overhaul the hydraulic assembly of a particular piece of equipment every 250 hours. Because the overhaul procedure requires the same repair kit, you would set up a standard parts list that includes all of the parts that are necessary to overhaul the hydraulic assembly.

Work order instructions specify the sequence of operations that is required to complete a work order, as well as the work centers that are responsible for each operation. You use standard work order instructions when the maintenance task for which the work order applies is routine and repetitive, and when you have advance knowledge of the labor requirements. To use standard work order instructions, you must set up work center information and information about the sequence of operations.

You can set up as many standard parts lists and standard work order instructions as you need. In addition, you can use a standard parts list or a version of standard work order instructions on as many work orders as you need. Typically, you assign standard parts lists and standard work order instructions to model work orders, but you can also use information from standard parts lists and standard work order instructions to create parts lists and routing instructions that you can attach to corrective work orders.

You use work centers to define each production facility on the shop floor where routing instruction operations occur. After you set up the work centers, you can enter costing and accounting information so that you can generate reports and journal entries.

This diagram illustrates how the system uses information from a standard parts list and standard work order instructions to generate a parts list and labor routing instructions for a work order that is assigned to a specific maintenance task:

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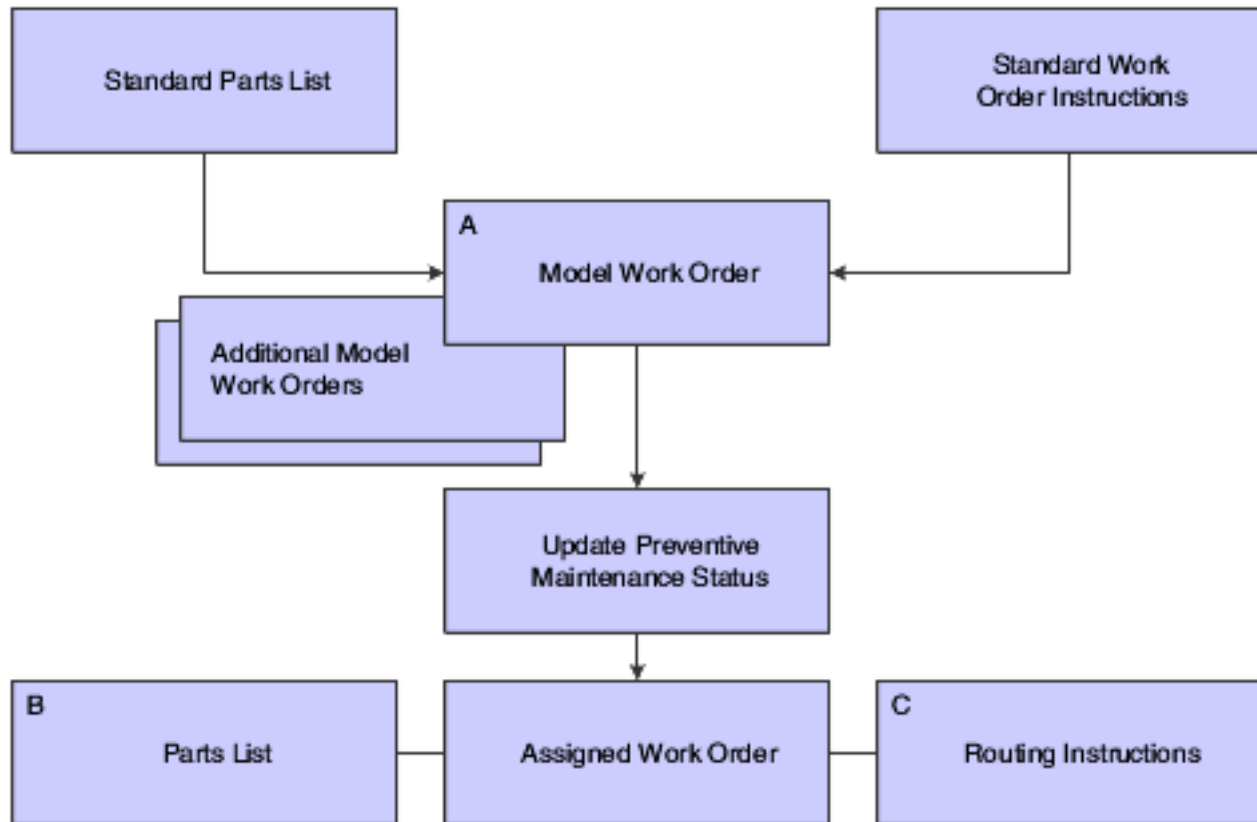
A

You can use standard parts lists and standard work order instructions for as many model work orders as you need.

B

Parts information for the assigned work order comes from the model work order. The system copies information from the standard parts list to the parts list that is attached to the assigned work order.

C

Routing instructions for the assigned work order come from the model work order. The system copies the standard work order instructions to the routing instructions that are attached to the assigned work order.

Standard Work Order Instructions

You can create standard work order instructions that establish labor routing steps for work orders. For example, assume that you have created a standard parts list for routine hydraulic maintenance. The hydraulic maintenance has multiple steps that must be performed in a specific sequence, such as machine lockout, disconnect motor, and so on. In addition, some of the steps must be performed by different work centers (crafts), such as electrical, mechanical, and so on. For this task, you would create standard work order instructions that specify the work centers and sequence of operations that are necessary to install the parts. You can then attach the instructions to each actual (firm) work order that is created for hydraulic maintenance.

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Understanding the Freeze Work Center Rates Program

After you enter the simulated costs for the work centers, you can run this program to update the frozen costs with the simulated values. The system uses these frozen costs to update the work order cost estimates.

You set the data selection to include the preferred work centers. The Freeze Work Center Rates program (R30860) uses the simulated costs to update labor and overhead rates in the Work Center Rates File table (F30008).

Prerequisites

Before you complete the tasks in this section:

- Verify that you have purchased and installed these systems. You must have installed these systems to be able to set up a standard parts list:

    - System 40: JD Edwards EnterpriseOne Inventory Base and Order Processing.

    - System 41: JD Edwards EnterpriseOne Inventory Management.

- Verify that inventory masters have been created for all parent items (part assemblies) and component items that you want to include on a standard parts list.

- Verify that inventory masters have been created for all of the parent numbers that are specified in Standard Instructions.

    See *"Entering Item Master Information" in the   JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*   .

- Define all work centers as business units.

Forms Used to Set Up Standard Parts Lists and Work Order Instructions

Form Name	FormID	Navigation	Usage
Enter Bill of Material Information	W3002A	Planning Setup (G1346), Standard Parts List Select a record on the Work with Bill of Material form, and then select BOM Revision from the Row menu.	Set up a standard parts list.
Enter Routing Information	W3003B	Planning Setup (G1346), Standard Work Order Instructions	Set up standard work order instructions.

Form Name	FormID	Navigation	Usage
		Complete the Branch/ Plant, Item, Number, and Batch Quantity fields on the Work with Routing Operations form, and click Add.	

Setting Up a Standard Parts List

Access the Enter Bill of Material Information form.

Batch Quantity

Enter a number that specifies the quantity of finished units that you expect this bill of material or routing to produce.

You can specify varying quantities of components based on the amount of finished units that have been produced. For example, assume that one ounce of solvent is required per unit for a maximum of 100 units of finished product. If 200 units are produced, then you need two ounces of solvent per unit of finished product. You can set up batch quantities for both 100 and 200 units of finished product by specifying the appropriate amount of solvent per unit.

Item Number

Enter a number that the system assigns to an item. The number can be in short, long, or third item number format.

The number of units that the system applies to the transaction.

A number that indicates how many components you use to manufacture the parent item. A quantity of **0** is valid. The default value is **1.**

Quantity

Enter a number that indicates how many components you use to manufacture the parent item.

A quantity of zero is valid. The default value is **1.**

UM (unit of measure)

Enter a user-defined code (00/UM) that identifies the unit of measure for an item.

For example, it can be each, case, box, and so on.

F V

Enter a code that indicates whether the quantity per assembly for an item on the bill of material varies according to the quantity of the parent item that is produced or is fixed regardless of the parent quantity.

This value also determines whether the component quantity is a percentage of the parent quantity. Values are:

F: Fixed Quantity

V: Variable Quantity (default)

%: Quantities are expressed as a percentage and must total 100 percent. For fixed-quantity components, JD Edwards EnterpriseOne Foundation - Work Order and JD Edwards EnterpriseOne Material Requirements Planning systems do not extend the component's quantity per assembly value by the order quantity.

Is Cd (issue code)

Enter a code that indicates how the system issues each component in the bill of material from stock.

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In JD Edwards EnterpriseOne Shop Floor Management, this code indicates how the system issues a part to a work order. Values are:

Blank: Shippable end item

I: Manual issue

F: Floor stock (there is no issue)

B: Backflush (when the part is reported as complete)

P: Preflush (when the parts list is generated)

U: Super backflush (at the pay-point operation)

S: Subcontract item (send to supplier)

You can issue a component in more than one way within a specific branch/plant by using different codes on the bill of material and the work order parts list. The bill of material code overrides the branch/plant value.

> **Note:**
>
> These fields have no application within JD Edwards EnterpriseOne Plant and Equipment Management:
>
> - Feature Planned Percent
>
> - Feature Cost Percent
>
> - From/Thru Grade
>
> - From/Thru Potency

Entering Costing Information for a Work Center

After you enter a work center, you can enter simulated rates for machine and labor hours.

You can update the simulated rates but not the frozen values. The system updates frozen values when you run Frozen Update.

> **Note:**
>
> - *"Entering Costing and Accounting Information for Work Centers" in the   JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide .*

Updating Frozen Costs for Work Centers

Select Product Costing (G3014), Freeze Work Center Rates.

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Setting Processing Options for the Freeze Work Center Rates Program (R30860)

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

Processing

Update Rates Mode

Specify whether the system simulates or freezes work center rates when you run the Freeze Work Center Rates program (R30860). Values are:

Blank: Simulate work center rates.

1: Freeze work center rates.

Print

Print Work Centers

Specify which records the system includes on the report when you run the Freeze Work Center Rates program (R30860). Values are:

Blank: Do not generate a report.

1: Include all work center records.

2: Include changed work center records only.

Setting Processing Options for the Standard Work Order Instructions Program (P3003)

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

Display

1. Line/Cell

Specify whether the system displays the Line/Cell field in the routing header.

The Line/Cell number defines a production line or cell in repetitive manufacturing. Values are:

Blank: Do not display the Line/Cell field.

1: Display the Line/Cell field.

2. Routing Type

Specify whether the system displays the routing type (40/TR) in the routing header.

You can define routing types to meet the needs of the organization. Values are:

Blank: Do not display the routing type.

1: Display the routing type.

3. Batch Quantity

Specify whether the system displays the Batch Quantity field in the routing header.

The batch quantity is the number of finished units that you expect this bill of material or routing to produce. You can specify varying quantities of components based on the amount of finished goods expected. Values are:

Blank: Do not display Batch Quantity.

1: Display Batch Quantity.

Defaults

1. Type of Routing

Specify the routing type that the system displays.

Routing types are defined in user-defined code 40/TR. You can define routing types that correspond to routing instructions. Examples include:

M: Standard Manufacturing Routing

RWK: Rework Routing

RSH: Rush Routing

If you choose to include the routing type in the routing header, the related routing instructions apply.

> **Note:** The product costing and capacity planning systems use only M routing types.

Process

1. Mode - Processing

Specify whether the system uses inquiry mode or revision mode for the Work with Routing Master program (P3003).

If you specify inquiry mode, you can add routings but you cannot revise existing routings. If you specify revision mode, you can add routings and make changes to existing routings. Values are:

0: Inquiry mode (default)

1: Revision mode

2. Update Component Operation Scrap Percent and Cumulative Yield

Specify whether the system updates these fields for the components in the operation when you update the operation yield percent:

- ○ Operation Scrap Percent in the Bill of Material Revisions program (P3002)
- ○ Cumulative Yield Percent in the Work with Routing Master program (P3003)

Values are:

Blank: Do not update the Operation Scrap Percent and Cumulative Yield Percent fields.

1: Update the Operation Scrap Percent and Cumulative Yield Percent fields.

Interop

1. Transaction Type

Specify the transaction type that the system uses for export processing or for the supply chain scheduling and planning.

Transaction Type is a user-defined code (00/TT) that specifies the type of transaction for the rate schedule.

> **Note:** Blank is a value if you do not use export processing.

2. Outbound Processing Version
Specify the version that the system uses when you access the Outbound Processing program (R00460) from the Work with Routing Master program (P3003).

Blank: ZJDE0001

3. Before Image Processing
Specify whether the system writes the before image for an outbound change transaction. Values are:

Blank: Do not write the before image for a change transaction.

1: Write the before image for a change transaction.

Versions

1. Bill of Material Revision (P3002)
Specify the version that the system uses when you access the Bill of Material Revisions program (P3002) from the Enter/Change Routings form.

Blank: ZJDE0001

2. Work With Assets (P1204)
Specify the version that the system uses when you access the Work With Assets program (P1204) from the Enter/Change Routings form.

Blank: ZJDE0001

3. Work with Item Master (P4101)
Specify the version that the system uses when you access the Item Master program (P4101) from the Enter/Change Routings form.

Blank: ZJDE0001

4. Work with Activity Based Costing Workbench (P1640)
Specify the version that the system uses when you access the Activity Based Costing Workbench program (P1640) from the Enter/Change Routing form.

Blank: ZJDE0001

Setting Up Standard Work Order Instructions

Access the Enter Routing Information form.

Work with Routing Operations

✓ Q + ☐ ✗   ⊗ View   ⊩ Form   ☰ Row   ⚙ Tools   ⟳ One View

	Branch/Plant ✱	M30

Item Number ✱	REPLACE INTAKE FILTERS	PM to replace intake Filters
Batch Quantity		EA
As of Date	09/11/15	Line/Cell	✱	Routing Type	M
Item Rev	✱	Drawing No		Skip to Op No.	✱

Records 1 - 5

	Work Center	Oper Seq#	Description	Activity Code	Run Labor	Run Machine	Setup Labor	Effective From
⦿	200-141	1.00	Lockout Electrical		.25			04/14/97
○	200-141	2.00	Replace Filters		.50			04/14/97
○	200-141	3.00	Replace Seals		.50			04/14/97
○	200-141	4.00	Inspect Motor		.25			04/14/97
○	200-141	5.00	Unlock		.25			04/14/97

◄   III   ►

Run Labor

Enter the standard hours of labor that you expect to incur in the normal production of this item.

The run labor hours in the Routing Master table (F3003) are the total hours that the specified crew size takes to complete the operation. The hours are multiplied by the crew size during shop floor release and product costing.

For Equipment/Plant, this is the estimated number of hours needed to complete a maintenance activity.

Queue Hours

Enter the total hours that an order is expected to be in queue at work centers and moving between work centers.

The system stores this value in the Item Branch table (F4102). You can calculate this value using the Leadtime Roll-up program or you can enter it manually. When you run the Leadtime Roll-up program, the system overrides manual entries and populates the table with calculated values.

Move Hours

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Enter the planned hours that are required to move the order from this operation to the next operation in the same work center.

If the Routing Master values are blank, the system retrieves the default value from the work order routing. However, the system uses these values only for backscheduling variable lead-time items.

Line/Cell

Enter a number that defines a production line or cell. Detailed work center operations can be defined inside the line or cell.

Crew Size

Enter the number of people who work in the specified work center or routing operation.

The system multiplies the run labor value in the Routing Master table (F3003) by crew size during costing to generate total labor amounts.

If the Prime Load Code is **L** or **B,** the system uses the total labor hours for backscheduling. If the Prime Load Code is **C** or **M,** the system uses the total machine hours for backscheduling without modification by crew size.

For JD Edwards EnterpriseOne Shop Floor Management, the Crew Size field on the Work Order Routing form contains the value that is entered on the Work Center Revision form (P3006). You can override the value by changing this field on the Work Order Routing form. However, the Work Center Revision form does not reflect this change.

Supplier

Enter the address book number of the preferred provider of this item.

Type Oper (Type Operation Code)

Enter a user-defined code (30/OT) that indicates the type of operation. Values are:

A: Alternate routing

TT: Travel time

IT: Idle time

T: Text

For JD Edwards EnterpriseOne Product Costing, only operations with a blank type operation code are costed.

Standard Desc.(standard description)

Enter a generic rates and message code (48/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 the Generic Message/Rate Types table (F00191).

Job Type

Enter a user-defined code (07/G) that defines the jobs within the organization.

You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.

PO (Y/N)

Enter a value that determines whether the Work Order Generation program (P31410) creates a purchase order for a subcontracted operation within a routing. Values are:

Y: Yes, create a purchase order.

N: No, do not create a purchase order.

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Next Oper (next operation)

Enter the operation number with which the current operation can be simultaneously processed.

Level From

Enter the value that sets the lowest value to be included in the rule criteria range for a competency level range selection.

Level To

Enter the value that sets the highest value to be included in the rule criteria range for a competency level range selection.

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17 Working with Work Orders

Understanding the Work Order Life Cycle

> **Note:** The Intelligent Graphic Solution (IGS) feature has been deprecated to address the bugs 21198035, 21198026, and 21198043.

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

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

In addition to these features, you can set up a work-order approval process within the JD Edwards EnterpriseOne Workflow Tools system. A predefined work-order approval process in the workflow system can be modified to suit your business needs.

The steps through which a work order must pass to accurately communicate the progress of the maintenance tasks that it represents are the life cycle of the work order. The work-order life cycle applies to work orders for preventive maintenance and corrective maintenance. You can select to display the Status Change form each time the work order advances through a step in the life cycle.

This diagram illustrates the flow of a work order through a typical work-order life cycle:

ORACLE
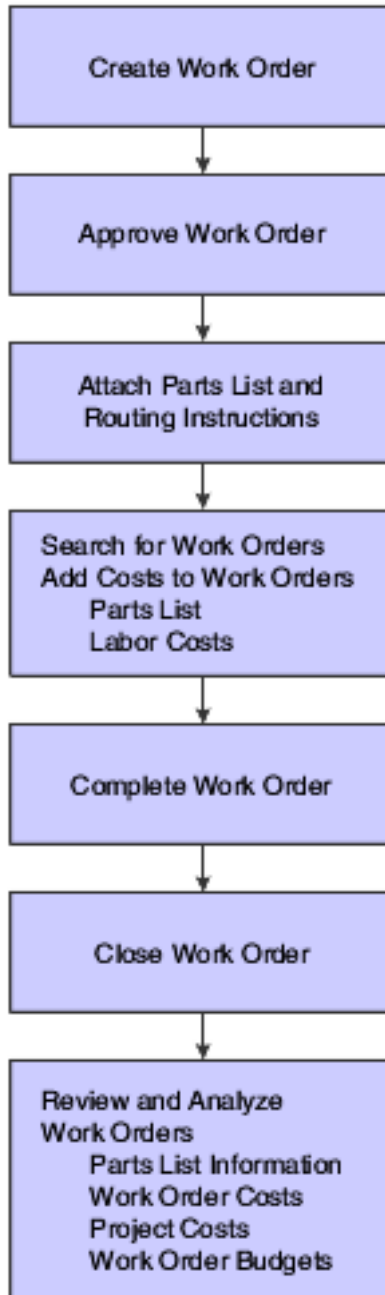
Understanding Workflow

Workflow offers a powerful means of automating various components of the work-order life cycle across the entire enterprise. Documents, information, and action messages automatically pass from one task to the next. The tasks are based on a set of procedural rules and initiating events, and require minimal involvement on your part. For example, you can use workflow to:

- Route a work order for approval.

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- Run the capacity plan for a work order.

- Send messages to appropriate personnel regarding the progress of a work order.

Some of these workflow examples are shipped with the software.

In addition, workflow enables you to:

- Define as many workflow processes as the business needs require.

- Attach any workflow process to any given event within an application.

- Run conditional processing, which is logic that is contingent upon supplied criteria, such as currency amount, status, and priority.

Example: Work Order Approval Process

This example helps you understand how the various components of the JD Edwards EnterpriseOne Workflow system, such as processes, subprocesses, and tasks, work together to provide a comprehensive workflow solution. The work order-approval process represents a typical workflow process within JD Edwards EnterpriseOne CAM. The example illustrates the particular workflow components that require modification to meet your business needs.

In the example, the approval process for a work order is based on the document type of the work order and the work order type. Document type and work order type are elements of the additional data structure that the JD Edwards EnterpriseOne Workflow system uses to approve work orders. To facilitate understanding, the example charts the workflow for a work order with the document type of WM and the work order type of Type 1. Document types and work order types are user-defined codes (UDCs). The codes that the organization uses most likely differ from the codes that the JD Edwards EnterpriseOne software provides as demonstration data.

In this example, the workflow process is initiated by the creation of a work order or any change that is made to the status of a work order. The system uses the Work Order Activity Rules to determine whether the status change is allowed. If the status change is not allowed, workflow does not begin, and an error message appears. Otherwise, workflow begins normally. In JD Edwards EnterpriseOne Plant and Equipment Management, regardless of any subsequent processes, the first workflow process for work orders is the WOactRules (Work Order Activity Rules) process. This process is hard-coded and cannot be modified.

These diagrams illustrate this example:

Figure 1

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Figure 2

WOActRules = Work Order Activity Rules Process
WMType = Work Order Type Process
WM1App1 = Work Order Approval Process
WMType1 = Work Order Type 1 Process
Con or OrgRule = Conditional or Organized Rule
Act = Activity
N Act = Next Activity
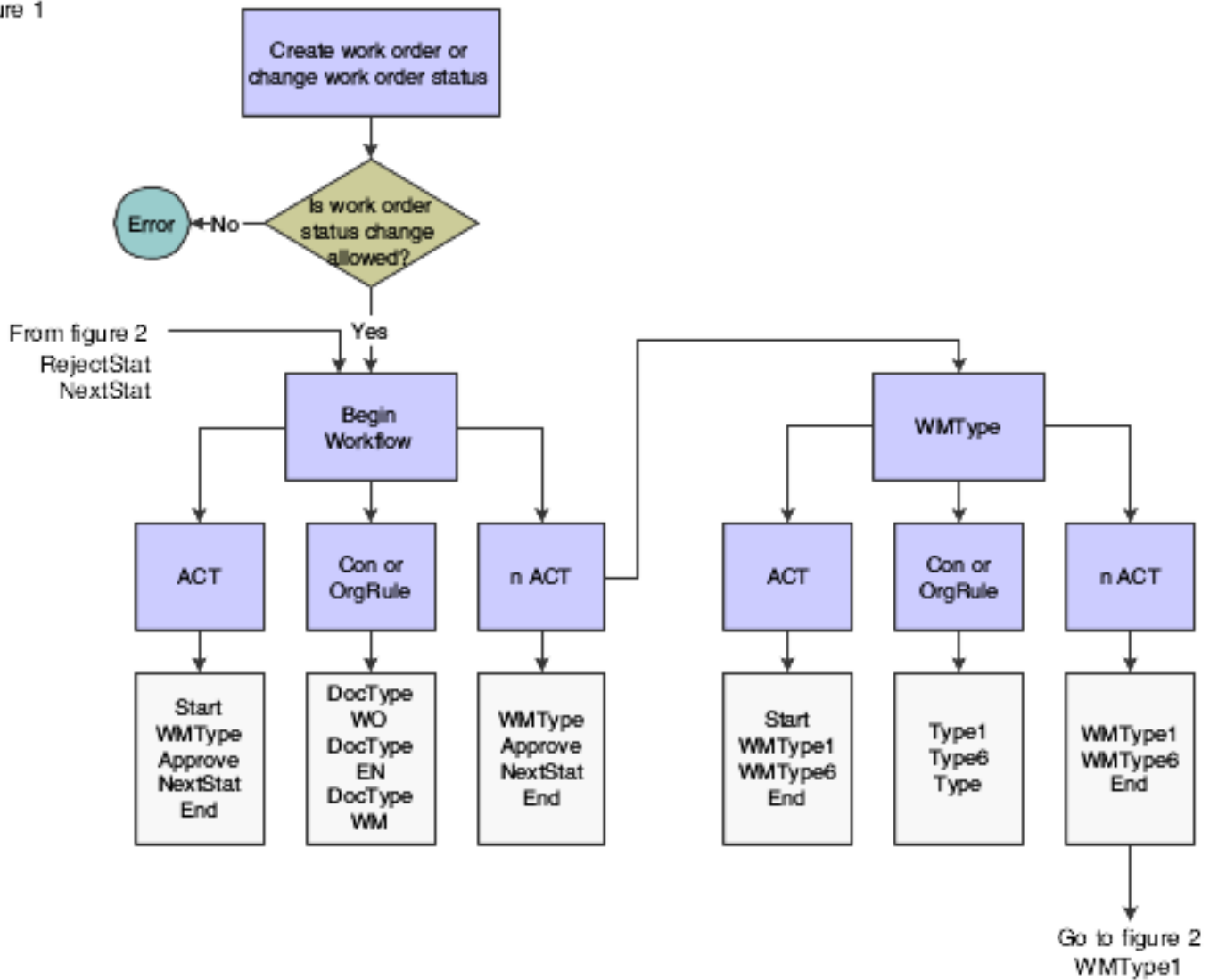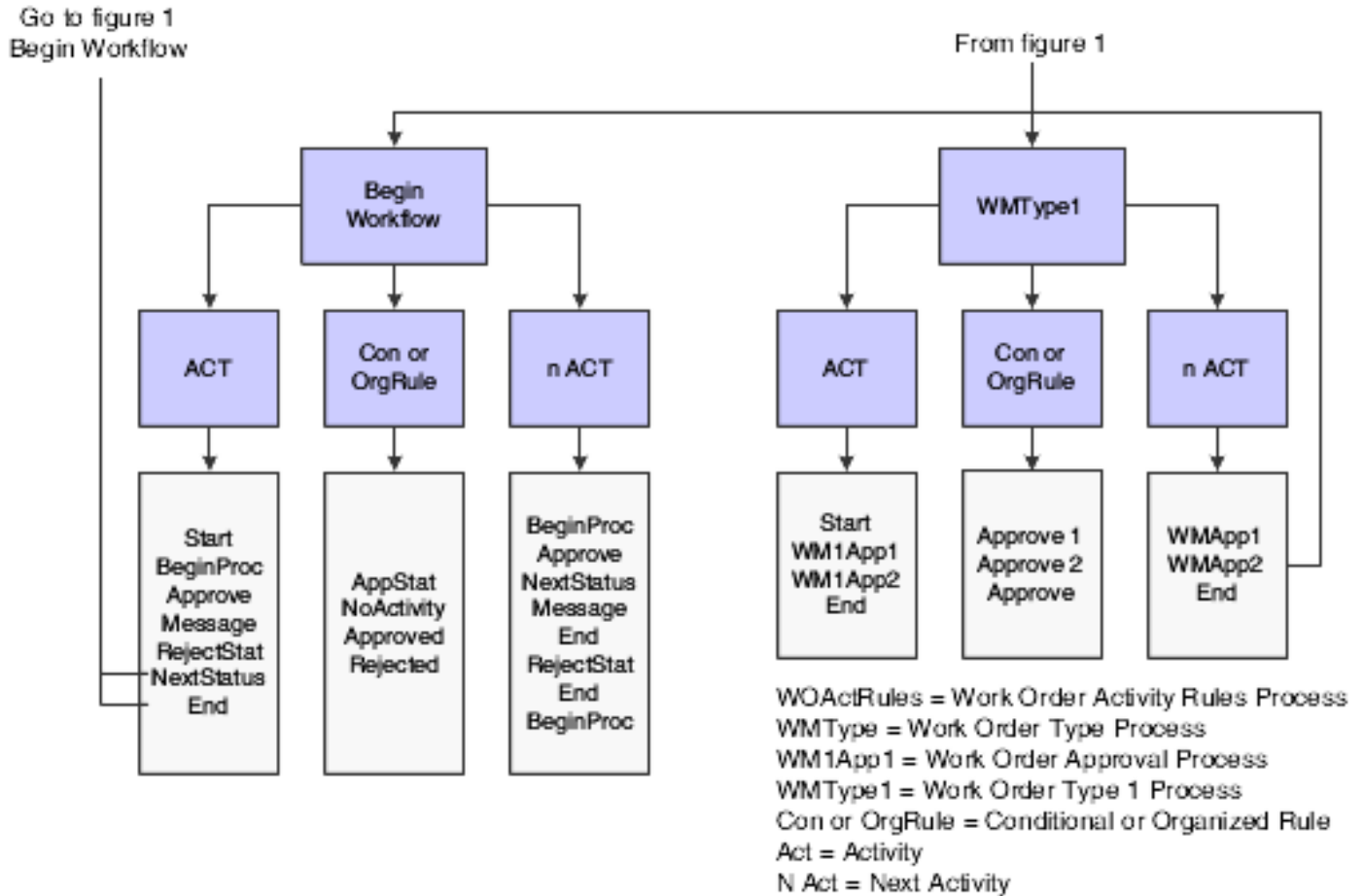
See *"Work Order Management Features" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide*

See also*"Entering Record Type Descriptions" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide*

Mobile Applications for Managing Work Orders

The following mobile applications are available, and can be used to manage work orders on a mobile device:

- Manage My Work Orders (Tablet and Smartphone)
- Manage My Work Orders Disconnected (Tablet and Smartphone)
- Review Team Service Orders (Tablet and Smartphone)
- Create Equipment Work Orders (Tablet)

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

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

- *Manage My Work Orders Mobile Applications*
- *Review Team Service Orders Mobile Applications*
- *Create Equipment Work Orders Mobile Application*

Understanding Work Order Mass Updates for Equipment Work Orders

The work order mass update process enables you to select and modify multiple work orders at the same time. You can use the mass update process for equipment work orders that are assigned a work order type of 04 (equipment) from the Order Type (48/OT) UDC table.

You use the Search for Work Orders program (P48022) to search for and select the work orders that you want to modify, and then use the Work Order Mass Update program (P48714) to enter the new values that you want to apply to the selected work orders. Alternatively, you can set up templates in the Work Order Mass Update Template program (P48710) to specify default values for the fields that you want to update. After you enter the new values, you run the Work Order Mass Update batch program (R48714) in draft mode, verify the changes that you want to make, and then run the R48714 program in final mode to commit the changes to the database.

See *"Using the Work Order Mass Update Process" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

Accessing the Work Order Mass Update Programs

Links to the Work Order Mass Update Template program and the Search for Work Orders program appear on the Periodic Processing menu (G1320). You access the Work Order Mass Update interactive program from the Search for Work Orders program, and access the Work Order Mass Update batch program from the Work Order Mass Update interactive program.

You can also access the Search for Work Orders program using these access points:

- An option in the Form menu in the Planning Workbench program (P13700).

  The system launches the version of the Search for Work Orders program that you specify in the Work Order Mass Update (P48022) Version processing option in the Planning Workbench program.

- An option on the Form menu in the Work With Work Orders program (P48201).

  The system launches the version of the Search for Work Orders program that you specify in the Work Order Mass Update (P48022) Version processing option in the Work With Work Orders program.

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Setting Up Your Environment to Use the Work Order Mass Update Process for Equipment Work Orders

Before you use the work order mass update process, you should set up versions and processing options for the programs used by the process. In addition to the processing options for the Search for Work Orders and Work Order Mass Update programs, the system uses some of the processing options from the versions of equipment work order management programs that you specify.

This table lists the programs for which you should set up processing options.

> **Note:** This table lists only the programs that have processing options that affect how work orders are processed in the work order mass update process. You will set up and specify versions of other applications if you do not want to use default versions. You specify the versions to use in the processing options of the Search for Work Orders program.

Program	Processing Options
Search for Work Orders (P48022)	You specify the version of this program to use in processing options in the Work With Work Orders (P48201) and Planning Workbench (P13700) programs. The Search for Work Orders program includes processing options in which you specify the versions of the programs to use when you use Form and Row menu options. You will need to set up versions of those programs if you choose to use a version other than the default version noted in the processing option description. See *"Setting Processing Options for Search for Work Orders (P48022)" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide .*
Work Order Mass Update (P48714)	You specify the version of this program to use in the Search for Work Orders program. See *"Setting Processing Options for Work Order Mass Updates (P48714)" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide .*
CAM - Manage Equipment Work Orders (P13714)	To use a specific version of this program: • Set the Work Order Revisions Application processing option in the Search for Work Orders program to 2. • Enter the version of the CAM - Manage Equipment Work Orders program that you want to use in the Work Order Revisions Version processing option in the Search for Work Orders program. See *Setting Processing Options for the CAM - Manage Equipment Work Orders Program (P13714)*
Work Order Revisions (P17714)	To use a specific version of the Work Order Revisions program (P17714), in the processing options for the Search for Work Orders program: • Specify1 in the Work Order Revisions Application processing option. • Specify 2 (equipment) in the Work Order Type processing option. • Specify the version name of the Work Order Revisions program to use in the Work Order Revisions Version processing option. See *Setting Processing Options for the Work Order Revisions Program (P17714)*

Program	Processing Options
Work With Work Orders (P48201)	You can access the work order mass update programs from an option on the Form menu in the Work With Work Orders program. Set the Work Order Mass Update (P48022) Version processing option in the Work With Work Orders program to use the appropriate version. See *"Setting Processing Options for Work With Work Orders (P48201)" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .
Planning Workbench (P13700)	You can access the work order mass update programs from an option on the Form menu in the Planning Workbench program. Set the Work Order Mass Update (P48022) Version processing option in the Planning Workbench program to use the appropriate version. See *Setting Processing Options for the Planning Workbench Program (P13700)*.

Equipment-Specific Work Order Mass Update Functions

You can use the work order mass update process to update manufacturing, tenant, service, and equipment work orders. When working with work orders for equipment, you should note that:

- Some of the options available in the work order mass update process are available for only specific work order types.

- Some actions that you can perform when working with individual equipment work orders are not supported when you work with multiple equipment work orders.

- Some of the processing options that you set up in the version of the CAM - Manage Equipment Work Orders program (P13714) or the Work Order Revisions program (P17714) that you use when working with work order mass updates affect the processing of the work order mass updates.

This table lists the functions that are specific to working with equipment work orders, the functions that are not supported when you work with multiple equipment work orders, and the processing logic in the CAM - Manage Equipment Work Orders program and Work Order Revisions program that affect work order mass updates for equipment work orders.

Function	Description
Display Children	The Search for Work Orders program includes a Display Children check box. As in the work with equipment work orders programs, when you select the check box and enter an equipment number, your search locates the child work orders of the equipment that you enter. Note: You can set a positive record limit for displaying the list of child work orders based on the search criteria in the Search for Equipment Work Orders (P48022) program by using the UDC (13/PI). When the number of records exceeds the limit set in the UDC, the Select Order/Equipment form is displayed. Using this form, you can select records based on either Order or Equipment. The selected order or equipment list is displayed in the original Search form - Search for Equipment Work Orders (P48022) program.
Include Models	The Search for Work Orders program includes an Include Models check box. As in the work with equipment work orders programs, your search includes model work orders when you select the check box.

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Function	Description
Craft	When you perform a search using a value in the Craft field, the system populates the grid in the Search for Work Orders program for only the work orders that have labor lines with a work center value that matches the value for the Craft field.
Prepayments	Mass updates for work orders for which prepayment processing is enabled is not supported.
Component change-out	The component change-out function is not supported when you work with mass updates for equipment work orders.
Entitlement checking	Entitlement checking is not supported when you work with mass updates for equipment work orders. When you set up the processing options for the Search for Work Orders program you must specify versions of these programs that do *not* have entitlement checking enabled: • Work Order Revision (P17714) • CAM - Manage Equipment Work Orders (P13714) If you use entitlement checking, the system assumes that the Service Order Entitlement Trigger field in the S/WM System Constants is set to 3 (customer), 6 (branch/plant) or 7 (site number). The work order mass update process verifies that entitlement checking is disabled only when the Service Order Entitlement Trigger field is set to one of these values. Changing the customer, site, or branch for a work order record can also trigger entitlements and require that labor and parts for the work order also be changed. If a work order has associated labor or parts records, you cannot change the customer, site or branch.
Field updates	Some fields that appear in equipment work orders are not editable when you work with multiple work orders. See *"Unsupported Fields by Work Order Type" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .
Default Date and Time for Status processing option	If you set this processing option to *1* to use the current system date and time on status change, the system will use the current system date and time will to update the completed date and time on the work order when you process work order mass updates.
Create Labor Detail processing option	If you set this processing option to *1* to create labor detail, the system creates the labor detail if the Lead Craft field is populated with an update value and no labor detail lines exist for the work order.
Email Manager/Crew processing option	If you set this processing option to *1* to send emails, the system sends an email to the crew if you change the value in the Crew field on the Equipment Work Order Mass Update form.
Create Individual Resource Assignments processing option	If you set this processing option to *1* to create assignments, the system creates resource assignments when you change the value in the Assigned To field on the Equipment Work Order Mass Update form.
Status Window on Update processing option	If you set this processing option to *1,* status related fields are *not* displayed on Equipment Work Order Mass Update form. Leave this processing option blank to display and enable status update fields.
Field-level validations	The system uses the same field-level validations for work order mass updates as it uses when you update single work orders. For example, the system validates the currency code when you change the branch or customer number, and validates the tax rate area and tax explanation code when you change the site number.

Function	Description
	The values that you enter in these fields on the Equipment Work Order Mass Update form take precedence over the logic used in the field-level validations: • Covered G/L Category • Non-Covered G/L Category • Planned Completion Date

Common Elements Used in This Chapter

Act. Payable Rate (actual payable rate)
Enter the actual payable rate that is associated with a transaction.

Actual Finish Date
Enter the date that the work order or engineering change order is completed or canceled.

If the status of the work order is Complete, the system uses the current date as the default value.

Asset Number
Enter an identification code that represents an asset. Use one of these formats:

     a. Asset number (a computer-assigned, eight-digit, numeric control number).
     b. Unit number (a 12-character alphanumeric field).
     c. Serial number (a 25-character alphanumeric field).

Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character that you enter indicates whether you are entering the primary (default) format that is defined for the system, or one of the other two formats. A special character (such as **/** or *****) in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats in the fixed assets constants.

Depending on the equipment constants that you set up on the SWM System Constants Revisions form, the system displays an equipment number, unit number, or serial number description. Based on this number, the system supplies customer and equipment information from the equipment record.

Assigned To
Enter the address book number of the person who is assigned to do the work.

For Service Management, the Assigned To person represents the primary technician.

Bill Y/N
Enter a value to specify whether a general ledger account should be billed. Values are:

Y: Yes, the account should be billed.

N: No, it should not be billed.

1: It is eligible only for invoicing.

2: It is eligible only for revenue recognition.

4: It is eligible only for cost.

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> **Note:** Codes 1, 2, and 4 relate only to the JD Edwards EnterpriseOne Service Billing system.

Capacity UOM (capacity unit of measure)

Enter a unit of measure that you use to express the capacity of a production line.

Examples of units of measure include:

- Hours
- Number of stampings
- Coats of paint

This item is used for repetitive processing only.

Category 02

Enter a value from UDC 00/W2 (Work Order Category Code 2) that indicates the type or category of a work order.

> **Note:** A processing option for some forms enables you to enter a default value for this field. The system enters the default value automatically in the appropriate fields on any work orders that you create on those forms and on the Project Setup form. You can either accept or override the default value.

Category 03

Enter a value from UDC 00/W3 (Work Order Category Code 3) that indicates the type or category of the work order.

Category 04

Enter a value from UDC 00/W4 (Work Order Category Code 4) that indicates the type or category of the work order.

Category 05

Enter a value from UDC 00/W5 (Work Order Category Code 5) that indicates the type or category of the work order.

Category 10

Enter a value from UDC 00/W0 (Work Order Category Code 10) that indicates the type or category of the work order.

Competency Level From

Enter the lowest value to be included in the rule criteria range for a competency level range selection.

Competency Level To

Enter the highest value to be included in the rule criteria range for a competency level range selection.

Country

Enter a value from UDC 00/CN (County Codes) that identifies a country.

The country code has no effect on currency conversion.

Address Book uses the country code for data selection and address formatting.

Coverage Group

Enter a UDC that specifies the coverage group.

The coverage group consists of unlimited cost codes and the percentage that is covered for each cost code.

Covered G/L Category

Enter a value from UDC 41/9 (G/L Posting Codes) that identifies the GL offset (general ledger offset) to use when the system is searching for the account to which it posts the covered portion (by warranty or contract) of the accounting transaction.

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If you do not want to specify a GL offset, you can enter four asterisks in this field or you can leave it blank. If you leave it blank, the system uses the GL offset from Inventory.

Document Number

Enter a number that identifies the original document, such as a voucher, invoice, or journal entry.

On entry forms, you can assign the document number or let the system assign it using the Next Numbers program (P0002). Matching document numbers (DOCM) identify related documents in JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable. Examples of original and matching documents are:

JD Edwards EnterpriseOne Accounts Payable:

- ᵒ Original document - voucher
- ᵒ Matching document - payment

JD Edwards EnterpriseOne Accounts Receivable:

- ᵒ Original document - invoice
- ᵒ Matching document - receipt

> **Note:** In JD Edwards EnterpriseOne Accounts Receivable, these transactions simultaneously generate original and matching documents: deductions, unapplied receipts, charge backs, and drafts.

The system supplies service contract values if the system is set up to check entitlements and the contract is valid.

The system uses next numbers to assign a work order number unless you override the information.

Entitlement Check

Enter a value from UDC 17/ER (Entitlement Check) that indicates the results of an entitlement check. Values are:

0: Not entitled.

1: Transaction entitled.

2: Contract found, but no existing service type.

3: Contract found, but no day and date assigned.

4: Covered under default warranty.

Est. Billable Rate

Enter the estimated billable rate that is associated with a service.

Est. Hours

Enter the estimated hours that are budgeted for this work order.

Est. Labor

Enter the estimated labor cost of a work order.

Est. Material

Enter the estimated material cost of a work order.

Est. Other

Displays an estimated amount.

If you associate routings with a work order, the system retrieves default values for the Labor Hours and Labor Amount fields. If you associate a parts list with a work order, the system retrieves default values for the Material Amount field. When you add a routing list, a parts list, or both, the program updates the cost to the work order header.

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Alternatively, to update the actual costs of a work order, you can run a batch program called Update W.O. Actual Amounts (R13800). This program summarizes transactions for labor and material, and updates the actual cost fields of the work order.

Est. Payable Rate

Enter the estimated payable rate that is associated with a transaction.

Estimated Downtime Hours

Enter the estimated duration of a work order. This defines how long the piece of equipment can be down and you can complete the work order, which is different from total estimated hours.

Estimated Hours

Enter the standard hours of labor that you expect to incur in the normal production of this item.

The run labor hours in the Routing Master table (F3003) are the total hours that are required for the specified crew size to complete the operation. The hours are multiplied by the crew size during shop floor release and product costing.

Estimated Payment Amount

Enter the estimated payment amount that is used in service billing.

Experience Level

Enter a value from UDC 00/W9 (PS Consulting Experience Lvl) that indicates the type or category of the work order.

Inspector

Enter the address book number of the inspector. For Service Management, the inspector represents the secondary technician.

Language

Enter a value from UDC 01/LP (Language) that specifies the language to use on forms and printed reports.

Before you specify a language, a code for that language must exist at either the system level or in user preferences.

Manager

Enter the address book number for the manager, or accept the default value. For JD Edwards EnterpriseOne Service Management, the manager represents the primary service provider.

> **Note:** A processing option for some forms enables you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. You set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the default information appears automatically on any work orders that you create if the category code criteria is met. You can either accept or override the default value.

Depending on the Default Manager processing option on the Process tab, you can enter either a valid address book number for the Manager and the Supervisor fields, or you can select to use the default hierarchy for managers and supervisors.

Message No

Enter a generic rates and message code (48/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 the Generic Message/Rate Types table (F00191).

Non-Covered G/L Category

Enter a value from UDC 41/9 (G/L Posting Code) that identifies the GL offset to use when the system is searching for the account to which it posts the noncovered portion of the accounting transaction.

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If you do not want to specify a GL offset, you can enter four asterisks in this field or you can leave this field blank. If you leave it blank, the system uses the GL offset from Inventory.

The values for the Covered G/L Category and Non-Covered G/L Category fields come from the service package for the service contract, based on the type of service on the work order.

Op St (operation status)

Enter a value from UDC 31/OS (Operation Status) that identifies the current status of a work order or engineering change order as the operation steps in the routing are completed.

Originator

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

The system verifies this number against the Address Book.

Paid Date

Enter the date on which a service provider was paid for a service.

Parent W.O. No (parent work order number)

Enter a number that identifies the parent work order.

You can use this number to:

- ᵒ Enter default values for new work orders, such as Type, Priority, Status, and Manager.
- ᵒ Group work orders for project setup and reporting.

Pay Price Method

Enter a code to use to determine whether this type of service should be priced based on a flat rate or based on actual time and materials. Values are:

Blank: Blank is valid only when you are defining the method of pricing for a service provider. It is used to indicate that the service provider is an internal service provider and should not be paid.

F Flat Rate: Charges for labor are based on one flat rate. Charges for parts are already included in the flat rate.

T Time and Materials: Charges for labor are based on actual labor hours. Charges for parts are based on actual parts used.

Payable Adj Schedule

Enter a value from UDC 40/AS (Schedule Name) that identifies a price and adjustment schedule.

A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through the customer billing instructions. When you enter a sales order, the system copies the schedule that is attached to the sold-to address into the order header. You can override this schedule at the detail line level.

Payable Y/N

Specify whether a general ledger account should be paid. Values are:

Y: The account should be paid.

N: The account should not be paid.

Payment Amount

Enter the amount of the payment in JD Edwards EnterpriseOne Accounts Payable.

Enter the amount of the receipt in JD Edwards EnterpriseOne Accounts Receivable. This amount must balance to the total amount that is applied to the invoice pay items.

Percent Complete

Enter a measurement that identifies the progress that is being made on an item such as an account, work order, and so on.

This is not always a calculated field and may need to be updated manually.

Percent of Overlap

Enter a number that indicates the percentage that successive operations can overlap.

The actual overlap percentage that you enter for the operation sequence is the percent by which that operation overlaps the prior operation. For example, if you enter 80 percent, the work can begin on the overlapped operation when 20 percent of the prior operation is completed.

> **Note:**
>
> Overlapping has no effect on move and queue calculations.
>
> The percent that you enter must be less than or equal to 100 percent.

Enter percents as whole numbers, for example, 5 percent as 5.00

Percentage Covered

Enter the percentage that is covered under warranty or contract.

This is used to calculate the amount to bill or the amount to cost for the line item that is being processed on the service order or call.

Phase

Enter a value from UDC 00/W1 (Phase/System Codes) 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.

> **Note:** Certain forms contain a processing option that enables 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.

Piecework Rate

Enter the rate to be paid for the type of component (piece) that is being produced.

Priority

Enter a value from UDC 00/PR (Work Order Priority) that indicates the relative priority of a work order or engineering change order in relation to other orders.

A processing option for some forms lets you enter a default value for this field. The value then appears automatically in the appropriate fields on any work order that you create on those forms and on the Project Setup form. You can either accept or override the default value.

Reference

Enter an alphanumeric value to use as a cross-reference or secondary reference number.

Typically, this is the customer number, supplier number, or job number.

Requested Finish Date

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Enter the date that the work order or engineering change order is planned to be completed.

This date can be calculated based on contract coverage.

Planned Finish Date

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

If the customer is entitled, the system calculates the commit date and time, based on the entitlement check process.

Planned Finish Time

Enter the time that the issue is scheduled to be finished.

Planned Start Date

Enter a start date.

The date is supplied by default from the system date or the date that you enter.

Planned Start Time

Enter the time that the issue is scheduled to be started.

Setup Crew

Enter the number of people who work in the specified work center or routing operation.

The system multiplies the Run Labor value in the Routing Master table (F3003) by crew size during costing to generate total labor amounts.

If the Prime Load Code is **L** or **B,** the system uses the total labor hours for backscheduling. If the Prime Load Code is **C** or **M,** the system uses the total machine hours for backscheduling without modification by crew size.

Skill Type

Enter a value from UDC 00/W8 (Country Code) that indicates the type or category of the work order.

Status Comment

Enter a brief description to explain the status of the work order.

W.O. Flash Message

Enter a value from UDC 00/WM (Work Order Flash Message) that indicates a change in the status of a work order.

The system indicates a changed work order with an asterisk in the appropriate report or inquiry form field. The system highlights the flash message in the Description field of the work order.

Creating Work Orders Using the Planning Workbench Program (P13700)

This section provides overviews of work orders and the planning workbench, lists prerequisites, and discusses how to:

- Enter work orders using the Planning Workbench.
- Set processing options for the Planning Workbench program (P13700).
- Set processing options for the CAM - Manage Equipment Work Orders program (P13714).

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Understanding Work Orders

You create work orders to formally request and schedule corrective maintenance, such as emergency repairs, and to record and communicate information about all of the details pertaining to the maintenance task. You create a work order in these circumstances:

- You need to bill for the parts and labor that are required to fix a piece of equipment.
- You need to send a technician to the site to repair the problem.
- You use a service provider to resolve the problem and you need to create a voucher for payment.

You can create work orders for equipment that is covered by warranties. When you create a work order for a piece of equipment that is under warranty, a message appears to alert you that a warranty is in effect. You indicate that a piece of equipment is under warranty by creating preventive maintenance (PM) service types for the warranty.

(Release 9.2 Update) When you create a work order for a piece of equipment that is obsolete, a warning message appears to alert you that the equipment is obsolete. To mark an item as obsolete, you need to have a value of O or U in the Stocking Type field, and a value other than T in the Line Type field for the item in the Item Master program (P4101).

Work orders contain basic information, such as the work order number, description, and business unit, to which the work order is charged. You can enter additional information, such as category codes, to further identify the work order. You can assign record types to work orders and then enter descriptive information into each record type to communicate important information about a task to others who are involved. For example, you might want to include special instructions and information about the parts and tools that are needed to complete the task.

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

- Identify each work center that is needed to perform the maintenance tasks.
- Specify the sequence in which the tasks are performed.
- Indicate the estimated duration of each maintenance task.

You can delete any work order from the system unless it has any of these characteristics:

- It is used as a parent work order.
- It has any account ledger transactions associated with it.
- It has a parts list or a routing attached.

When you enter a work order, the system creates a record in the Work Order Master File table (F4801) and creates an extension table to store information that is pertinent to JD Edwards EnterpriseOne Service Management or JD Edwards EnterpriseOne CAM work orders in the Service Order Extension table (F4817).

Understanding the Planning Workbench

The Planning Workbench provides an interface that improves usability and navigation. You can add and revise work orders, as well as parts and labor, without having to access the programs separately using form menus. Instead, programs are available from tabs and detail links from the Work Order - Manage [work order description and number] form.

If the organization is using scripting, use the Script Runtime program (P90CF180) to guide you through a script that can help you find a solution to a work order that you are working on. A script is a predefined set of questions or statements that are joined together in a specific order and used to gather information from respondents.

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For scripting, you can also use the JD Edwards EnterpriseOne Solution Advisor programs.

See *"Setting Up Solution Advisor" in the JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

Also see *"Setting Up and Managing Scripts" in the JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

Prerequisites

Before entering work orders, complete these tasks:

- Create a branch plant.
- Set up work order activity rules.

Forms Used to Create Work Orders Using the Planning Workbench Program (P13700)

Form Name	FormID	Navigation	Usage
Search for Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Search for or add equipment work orders.
Add Work Order	W13714A	Click Add on the Search for Equipment Work Orders form to create a work order. After you add work order information and click OK, the system displays the Status Change form (W17714C) if a processing option is set appropriately.	Enter work orders using the Planning Workbench.
Work Order - Manage [work order description]	W13714B	Click Save and Continue on the Add Work Order form to continue with the work order and make additional changes or start to add the parts and labor. Click Save and Exit on the Add Work Order form to save the work order and return to the Search for Equipment Work Orders form. Select a work order and click Select on the	Enter, view, or revise work orders. Select the Planning, Order Detail, Classification, Accounting, or Attachment tab to enter the relevant information.

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Form Name	FormID	Navigation	Usage
		Search for Equipment Work Orders form to view or revise work order information. Click Save and Add New on the Add Work Order form to save the work order and remain on the form to enter another work order.	
Work Order - Related Links for [work order description]	W13714C	Select the Related Links detail link on the Work Order - Manage [work order description] form.	Maintain or view the work order information as enabled by these links: • Work Order • Customer • Equipment
Work Order Parts - Manage [work order description]	W13730A	Select the Parts tab on the Work Order - Manage [work order description] form.	Review or revise parts detail for work orders.
Work Order Labor - Manage [work order description]	W13732A	Select the Labor tab on the Work Order - Manage [work order description] form.	Review or revise labor detail for work orders.
Work Order - Manage [work order description], Attempted Solutions	W1371401A	Select the Solution tab on the Work Order - Manage [work order description] form.	Review, revise, or assign solutions for work orders. **Note:** These solution items are applicable only if you are using Solution Advisor. Otherwise, access is not available.
Work Order - Manage [work order description], Frequently Used	W1371401B	Click the Frequently Used link on the Solution tab of the Work Order - Manage [work order description] form.	Find frequently used solutions for work orders and assign a solution to a work order if applicable.
Work Order - Manage [work order description], Search	W1371401C	Click the Search link on the Work Order - Manage [work order description] form.	Search for similar solutions for work orders.
Work Order - Manage [work order description], Create New	W1371401D	Click the Create New link on the Work Order	Create new work order solutions and add them to the solution database.

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Form Name	FormID	Navigation	Usage
		– Manage [work order description] form.	
Work Order – Manage [work order description], Status History	W90CD003B	Select the Status History tab on the Work Order – Manage [work order description] form.	View status history for work orders.
Work Order – Related Actions for [work order description]	W1371402A	Select the Related Actions tab on the Work Order - Manage [work order description] form.	Associate a script with a work order.

Entering Work Orders Using the Planning Workbench (P13700)

Access the Work Order – Manage [work order description] form.

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| Planning | Order Detail | Classification | Accounting | Attachments |

Status

| Status | M | Maintenance Work Request |

Est. Hours			Actual Hours	
Estimated Downtime Hours			Actual Downtime Hours	
Planned Comp		00:00:00	Guaranteed Response Time	.00
Start Date		00:00:00	Percent Complete	100.00
Requested		00:00:00	Parent W.O. No	1599
Completed		00:00:00	Priority	M
Status Comment				

Responsible Persons

Manager		
Lead Craft	ELECTRICIAN	Electrician
Supervisor	6140098	Lucy Frankfurter
Assigned To	2006	Walters, Annette
Inspector		
Originator	1411506	Parkinson, Rob

Setting Processing Options for the Planning Workbench Program (P13700)

Use these processing options to set default values for the Planning Workbench program.

Defaults

1. From Status Code W.O.

Enter a value from UDC 00/SS (Work Order Status) that specifies the beginning status code for a range of work orders.

The system uses this default when searching for work orders.

2. Thru Status Code W.O.

Enter a value from UDC 00/SS (Work Order Status) that specifies the ending status code for a range of work orders.

ORACLE

The system uses this default when searching for work orders.

3. Type - W.O.

Enter a value from UDC 00/TY (Work Order/ECO Type) that specifies the classification of work orders or engineering change orders.

The system uses this default when searching for work orders.

4. Document Type

Enter a value from UDC 00/DT (Document Type) that specifies the document type.

The system uses this default when searching for work orders.

5. Job or Business Unit

Specify the business unit or job that the system uses to search for work orders.

6. Models

Specify whether the system displays model work orders. Values are:

Blank: Do not include models.

1: Include models.

7. Originator

Specify the originator of the work order that the system uses to search for work orders.

8. Customer

Specify the customer of the work order that the system uses to search for work orders.

9. Crew

Specify the crew of the work order that the system uses to search for work orders.

10. Supervisor

Specify the supervisor of the work order that the system uses to search for work orders.

11. Assigned To

Specify the assigned to personnel of the work order that the system uses to search for work orders.

Categories

1. Phase

Enter a value from UDC 00/W1 (Work Order Category Code 1) that specifies the current stage or phase of development for work orders that the system uses to search for work orders.

2. Category Code 02, through 20. Category Code 20

Enter a value from the appropriate UDC that specifies the type or category of work orders that the system uses to search for work orders.

Versions

1. Work Order (P13714) Version

Specify the version of the Equipment Work Order program (P13714) that the system uses. If you leave this processing option blank, the system uses ZJDE0001.

2. Equipment Work Order Print (R48425) Version

Specify the version of the Maintenance Work Order Report program (R48425) that the system uses to print work orders. If you leave this processing option blank, the system uses XJDE0001.

3. Completed PM (P12071) Version

Specify the version of the Preventive Maintenance Backlog program (P12071) that the system uses. If you leave this processing option blank, the system uses ZJDE0001.

4. Inventory Issues (P31113) Version

Specify the version of the Work Order Inventory Issues program (P31113) that the system uses. If you leave this processing option blank, the system uses ZJDE0002.

5. Open Purchase Order (P4310) Version

Specify the version of the Purchase Orders program (P4310) that the system uses. If you leave this processing option blank, the system uses ZJDE0011.

6. Time Entry By Employee (P051121) Version

Specify the version of Speed Time Entry (P051121) that the system uses. If you leave this processing option blank, the system uses ZJDE0001.

7. Work with Failure Analysis (P17766) Version

Specify the version of the Work with Failure Analysis program (P17766) that the system uses. If you leave this processing option blank, the system uses ZJDE0001.

8. Failure Analysis (P17767) Version

Specify the version of the Failure Analysis program (P17767) that the system uses. If you leave this processing option blank, the system uses ZJDE0001.

9. Supplier Recovery Generation (R1776) Version

Specify the version of the Create Supplier Recovery Claims program (R1776) to use to generate a supplier recovery claim from a work order. If you leave this processing option blank, the system uses XJDE0001.

10. Work with Equipment Work Orders (P13220) Version

Specify the version of the Work with Equipment Work Orders program (P13220) to use. If you leave this processing option blank, the system uses XJDE0001.

11. Work Order Cost (P48211) Version

Specify the version of the Work Order Cost program (P48211) to use when you review the cost of an order. If you leave this processing option blank, the system uses ZJDE0001.

12. Resource Assignment (P48331) Version

Specify the version that the system uses for the Resource Assignment program (P48331). If you leave this processing option blank, the system uses ZJDE0001.

13. Equipment Search/Select (P17012S) Version

Specify the version to use for the Equipment Search/Select program (P17012S). If you leave this processing option blank, the system uses ZJDE0001.

14. Work With Unscheduled Maintenance (P13UM) Version

Specify the version of the Work With Unscheduled Maintenance program (P13UM) to use when you review the cost of an order. If you leave this processing option blank, the system uses ZJDE0001.

15. Estimate to Actual Variance (P48218) Version

Specify the version of the Estimate To Actual Variance program (P48218) to use when you review the cost of an order. If you leave this processing option blank, the system uses ZJDE0001.

16. Work Order Mass Update (P48022) Version

Specify the version of the Work Order Mass Update program (P48022) to use when you work with mass updates for work orders. If you leave this processing option blank, the system uses ZJDE0001.

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Process

1. Priority

Specify whether the system applies a contrasting color to the Priority field within the detail area. Values are:

Blank: Do not highlight and color code.

1: Highlight and color code.

> **Note:** Colors for the Priority field are hard-coded by the special handling field in UDC 00/PR (Work Order Priority).

Setting Processing Options for the CAM – Manage Equipment Work Orders Program (P13714)

Use these processing options to supply the default values for the CAM – Manage Equipment Work Orders program.

Defaults

These processing options enable you to specify the default values that the system uses when you revise or enter work orders.

1. Work Order Document Type

Enter a value from UDC 00/DT (Document Type - All Documents) that the system uses when you enter a work order. This code also indicates the origin of the transaction.

2. Work Order Type

Enter a value from UDC 00/TY (Work Order/ECO Type) that the system uses when you enter a work order.

The order type indicates the type classification of a work order or engineering change order. You can use work order type as a selection criterion for work order approvals.

3. Work Order Priority

Enter a value from UDC 00/PR (Work Order Priority) that specifies the default work-order priority that the system uses when you enter a work order.

This code indicates the priority of a work order or engineering change order in relation to other orders.

4. Customer

Specify an address book number of employees, applicants, participants, customers, suppliers, tenants, and any other address book members that the system uses as a default.

An address book number is a number that identifies an entry in JD Edwards EnterpriseOne Foundation - Address Book.

5. Crew

Specify the address book number of the crew that the system uses as a default when you enter a work order.

6. Supervisor

Specify the address book number of the supervisor that the system uses as a default when you enter a work order.

7. Assigned To

Specify the address book number of a person that the system assigns to do the work when you enter a work order.

8. Inspector

ORACLE

Specify the address book number of an inspector that the system uses as a default when you enter a work order.

9. Type Bill of Material

Enter a value from UDC 40/TB (Bill Type) that the system uses as a default.

The system reads the bill-of-material-type code on the work order header; this specifies which bill of material to use to create the work order parts list.

10. Type of Routing

Enter a value from UDC 40/TR (Routing Type) that the system uses as a default.

The system reads the routing type code on the work order header; this specifies which routing to use to create the work order labor instructions.

11. Failure Description

Specify the information type that the system retrieves for the failure description when you enter a work order. Values are:

Blank: Do not enter a failure description.

1: Use the default service type description.

2: Use the entitlement description.

3: Use the default work order description.

12. Supplier Recovery

Specify whether the system displays the supplier recovery fields. Values are:

Blank: Do not display the supplier recovery fields.

1: Display the supplier recovery fields.

13. Supplier Recovery Vendor

Specify which supplier or vendor the system uses when it creates a supplier recovery claim from a work order or a warranty claim.

14. Default Date and Time for Status

Specify whether the system displays the Actual Finish Date and Time or the system date and time. Values are:

- ○ Blank: The system displays the Actual Finish Date and Time. If there are no values in the Actual Finish Date and Time fields on the work order, the system displays the current system date and time on the Status Change form.
- ○ **1:** The system displays the current system date and time.

Edits

These processing options define what information is required when you enter a work order. When you activate these processing options, the system verifies that you have entered the appropriate information in the corresponding fields before it creates a work order. If you have activated any of these processing options and you do not have a value in a corresponding field, the system generates a hard error message and does not enable you to enter a work order.

1. Required Equipment Number

Specify whether you are required to enter an equipment number when you create a work order. Values are:

Blank: Do not require an equipment number.

1: Require the equipment number. If you do not enter an equipment number, the system generates an error message and stops processing until the error is corrected.

ORACLE

2. Require Customer Number

Specify whether to require a customer address number when you enter a work order. Values are:

Blank: Do not require a customer address number.

1: Require a customer address number.

3. Warn if Business Unit does not match BU associated with the Equipment Number

Specify whether the system issues a warning if the responsible business unit does not match the business unit that is associated with the equipment number. Values are:

Blank: Do not issue a warning.

1: Issue a warning.

4. Start Date Default

Specify whether to use the current date as the default if you leave the Start Date field blank. Values are:

Blank: Do not use the current date as the default.

1: Use the current date as the default.

5. Date Edits

Specify whether the system verifies dates when you enter or change a work order. Values are:

Blank: Do not verify dates.

1: Verify dates. If the system detects date errors, it generates a warning, but does not stop processing.

2: Verify dates. If the system detects date errors, it generates an error and stops processing until the error is corrected.

6. Required Caller Number

Specify whether the system requires you to enter the address book number for a caller when you are entering an order. Values are:

Blank: Caller number is not required.

1: Caller number is required.

7. Required Phone Number

Specify whether to require an area code and phone number when you create a work order. Values are:

Blank: Do not require an area code and phone number.

1: Require an area code and phone number.

8. Edit Case Number

Specify whether the system verifies that the request number on the work order exists in the Case table (F1755). Values are:

Blank: Do not verify the request number on the work order.

1: Verify the request number on the work order.

Process

These processing options define the processing that the system performs for this version of CAM - Manage Work Order (P13714). You can select whether the system retrieves default information that is based on the information that you

ORACLE

enter for a work order. You can perform additional processing, such as creating parts lists and routings, entitlement checking, and approval processing.

1. Default Crew

Specify the default values for manager and supervisor addresses on the work order. Values are:

Blank: The system does not supply default values for the manager and supervisor addresses.

1: The system uses default values for the manager and supervisor addresses based on this hierarchy:

Specify the default values for manager and supervisor addresses on the work order. Values are:

First: The system uses the values for the manager and supervisor from processing options.

Second: The system uses the manager value from the JD Edwards EnterpriseOne Service and Warranty Management (SWM) Address Book extension record for the customer.

Third: The system uses the manager value from the equipment record.

Fourth: The system uses the values for the manager and supervisor from the Work Order Default Coding File table (F48001), based on category codes 1, 2, and 3 from the work order.

> **Note:** The system uses the Assigned To address value from processing options first and information from the equipment record second.

2. Recalculate Dates

Specify whether the system automatically recalculates the start date (STRT) and the request date (DRQJ) for the labor detail, and the request date (DRQJ) for the parts detail. Values are:

Blank: Do not recalculate dates automatically.

1: Automatically recalculate the start and requested dates for the parts and labor detail.

3. Work Order Approval Type

Enter a value from UDC 48/AP (Approval Type) that specifies the approval type that the system uses for the work-order approval process.

The approval type indicates the type of approval path that a work order follows.

4. Work Order Cross Reference

Specify the work order cross-reference, which the system uses to determine the default parent equipment number. Values are:

Blank: The immediate parent of the equipment

1: The top level parent

2: The value from the parent work order

5. Entitlement Checking

Specify whether the system performs entitlement checking and the preferred method. Values are:

Blank: Bypass entitlement checking.

1: Check entitlements using the Entitlement Dates table (F1791).

2: Check entitlements without using the Entitlement Dates table.

6. Failure Analysis

ORACLE

Specify whether the system requires you to perform failure analysis when you enter a work order. Values are:

Blank: Do not perform failure analysis.

1: Perform failure analysis.

7. Display Entitlement Inquiry

Specify whether the system displays the Entitlement Inquiry form following an entitlement check. Values are:

Blank: Do not display the Entitlement Inquiry form.

1: Display the Entitlement Inquiry form.

8. Create Labor Detail

Specify whether the system creates labor detail when you create a work order. Values are:

Blank: Do not create labor detail.

1: Create labor detail.

9. Create Parts Detail

Specify whether the system automatically creates a parts list when you add a work order. Values are:

Blank: Do not automatically create a parts list.

1: Automatically create a parts list.

10. Display Who's Who Search

Specify whether the system displays the Who's Who Search & Select form when you move past the customer number field and the Caller Name field is blank. Values are:

Blank: Do not display the Who's Who Search & Select form.

1: Display the Who's Who Search & Select form.

11. Work Order Status Window

Specify whether the system automatically displays the work order status window when you add a work order. Values are:

Blank: Do not automatically display the work order status window.

1: Automatically display the work order status window.

12. E-mail Crew

Specify whether the system sends an email message to the crew when you create a work order. Values are:

Blank: Do not send a message.

1: Send a message.

13. Create Individual Resource Assignments

Automatically create individual resource assignments using address book number in the Assigned To (ANP) field on the form. The system validates the address book number against the Resource Master table (F48310). Values are:

Blank: Do not create assignments.

1: Create assignments.

14. Hide Order Detail Tab

Specify whether to hide the Order Detail tab on the Work Order Revisions form. Values are:

ORACLE

Blank: Do not hide the Order Detail tab.

1: Hide the Order Detail tab.

15. Hide Classification Tab

Specify whether to hide the Classification tab on the Work Order Revisions form. Values are:

Blank: Do not hide the Classification tab.

1: Hide the Classification tab.

16. Hide Accounting Tab

Specify whether to hide the Accounting tab on the Work Order Revisions form. Values are:

Blank: Do not hide the Accounting tab.

1: Hide the Accounting tab.

17. Hide Attachment Tab

Specify whether to hide the Attachment tab on the Work Order Revisions form. Values are:

Blank: Do not hide the Attachment tab.

1: Hide the Attachment tab.

18. Implicit Save

Specify where to use the Implicit Save option. When you change values on the equipment work order, parts, or labor forms, and you leave the form without saving, this option specifies whether the system prompts you to save the changes or whether the system implicitly saves the changes prior to closing the form. Values are:

Blank: Prompt for save.

1: Implicit save.

19. Status Window on Update

Specify whether the system displays the Status Change form when you update a work order. Values are:

- ○ Blank: The system displays the Status Change form each time a work order is updated.

- ○ **1:** The system hides the Status Change form when a work order is updated.

  If the Status Window on Update processing option is set to hide the Status Change form, and you update the work order status, the system writes a history record to the F1307 table with the date and time specified in the Default Date and Time for Status processing option on the Defaults tab.

20. Status Code to Remove Resource Assignments

Specify a user-defined code from the UDC table (00/SS) to automatically remove resource assignments associated with the work order when you change the status of the work order. For example, when you change the status of a work order to cancel, the resource assignments associated with it are removed.

If you leave this processing option blank, the system does not remove resource assignments associated with the work order.

Equipment Master

These processing options define whether the system updates information in a corresponding equipment record to match the information in a work order.

1. Customer Number Update

ORACLE

Specify how the system updates the Equipment Master when you change the customer number for an equipment record on a call, a contract, or a work order. Values are:

Blank: Do not update the Equipment Master.

1: Display a prompt to update the Equipment Master.

2: Automatically update the Equipment Master.

2. Site Number Update

Specify how the system updates the Equipment Master when you change the site number for an equipment record on a call, a contract, or a work order. Values are:

Blank: Do not update the Equipment Master.

1: Display a prompt to update the Equipment Master.

2: Automatically update the Equipment Master.

Versions

These processing options specify the versions of other programs that the system uses when you require additional information about the work orders. You can access these programs from Form and Row menu selections on the Work Order Revisions form.

1. Work Order Parts (P13730) Version

Specify the version of the Work Order Parts Detail program (P13730). If you leave this processing option blank, the system uses ZJDE0001.

2. Work Order Labor (P13732) Version

Specify the version of the Work Order Labor Detail program (P13732). If you leave this processing option blank, the system uses ZJDE0001.

3. Equipment Work Order Report (R48425) Version

Specify which version of the Maintenance Work Order Report (R48425) the system uses to print maintenance work orders. If you leave this processing option blank, the system uses XJDE0001.

4. Work Order Status History (P90CD003) Version

Specify the version of the Status History program (P90CD003) that the system uses when you inquire on the status history of a work order. If you leave this processing option blank, the system uses ZJDE0001.

5. Product Repair History (P17715) Version

Specify the version of the Work with Work Order History program (P17715) that the system uses for product repair history. If you leave this processing option blank, the system uses ZJDE0001.

6. Customer Repair History (P17715) Version

Specify the version of the Work with Work Order History program (P17715) that the system uses for customer repair history. If you leave this processing option blank, the system uses ZJDE0002.

7. Equipment Repair History (P17715) Version

Specify the version of Service Order History program (P17715) that the system uses for equipment repair history. If you leave this processing option blank, the system uses ZJDE0003.

8. Work With Contracts (P1720) Version

Specify the version to use for Work With Contracts (P1720). If you leave this processing option blank, the system uses ZJDE0001.

9. Work With Labor Master (P3003) Version

ORACLE

Specify the version of the Work With Routing Master program (P3003). If you leave this processing option blank, the system uses ZJDE0001.

103. Bill of Material Revisions (P3002) Version

Specify the version to use for Bill of Material Revisions (P3002). If you leave this processing option blank, the system uses ZJDE0001.

11. CRP/RCCP Regeneration (R3382) Version

Specify the version of the CRP Regeneration program (R3382) to use. If you leave this processing option blank, the system uses ZJDE0001.

12. Manager Address Book (P01012) Version

Specify which version the system uses for the Address Book program (P01012) for managers. If you leave this processing option blank, the system uses ZJDE0001.

13. Failure Analysis (P17767) Version

Specify which version the system uses for the Failure Analysis program (P17767). If you leave this processing option blank, the system uses ZJDE0001.

14. Work with Failure Analysis (P17766) Version

Specify the version of Work with Failure Analysis (P17766) to use. If you leave this processing option blank, the system uses ZJDE0001.

15. Failure Analysis Tree Search and Select (P17763S)

Specify which version of the Failure Analysis Tree Search and Select program (P17763S) the system uses. If you leave this processing option blank, the system uses ZJDE0001.

16. Failure Analysis Search and Select (P17768) Version

Specify which version of the Failure Analysis Search and Select program (P17768) the system uses. If you leave this processing option blank, the system uses ZJDE0001.

17. Equipment Master Revisions (P1702) Version

Specify the version to use for Equipment Master Revisions (P1702). If you leave this processing option blank, the system uses ZJDE0001.

18. Equipment PM Schedule (P1207) Version

Specify the version to use for Equipment PM Schedule (P1207). If you leave this processing option blank, the system uses ZJDE0001.

19. Equipment Status History (P1307) Version

Specify the version to use for the Status History program (P1307). If you leave this processing option blank, the system uses ZJDE0001.

20. Quick Customer/Contact Add (P01015) Version

Specify the version to use for Quick Customer/Contact Add (P01015). If you leave this processing option blank, the system uses ZJDE0001.

21. Customer Address Book (P01012) Version

Specify the version to use for Customer Address Book (P01012). If you leave this processing option blank, the system uses ZJDE0001.

22. Equipment Search/Select (P17012S) Version

Specify the version of the Equipment Search/Select program (P17012S). If you leave this processing option blank, the system uses ZJDE0001.

23. Work With Work Order History (P17715) Version

Specify the version of the Work With Work Order History program (P17715) to run. If you leave this processing option blank, the system uses ZJDE0001.

24. Work Order Quote (17717) Version

Specify the version of the Work Order Quote program (17717) to run. If you leave this processing option blank, the system uses ZJDE0001.

25. Resource Assignment Workbench (P48331) version

Specify the version for the Resource Assignment program (P48331) to run. If you leave this processing option blank, the system uses ZJDE0001.

26. Component Change-out (P17STAT) version

Specify the version of the Component Change-out program (P17STAT) to run. If you leave this processing option blank, the system uses ZJDE0001.

27. Status Change (P17714) Version

Specify the version of the Status Change program (P17714) to run. If you leave this processing option blank, the system uses ZJDE0001.

28. Case Update (P90CG501) Version

Specify the version of the Case Update program (P90CG501) to run. If you leave this processing option blank, the system uses ZJDE0001.

Category Codes

These processing options specify the values for category codes in the CAM - Manage Work Orders form. An additional 10 category codes are available for P13714.

Enter default category code values for:

1. Category Code 1, through 20. Category Code 20

Enter a value from the appropriate UDC table that the system uses as a default. This category code indicates the type or category of a work order.

> **Note:**
>
> - *"Entering Basic Work Order Information" in the   JD Edwards EnterpriseOne Applications Work Orders Implementation Guide   .*

Assigning Parts to a Work Order

This section provides an overview of parts assignment, lists prerequisites, and discusses how to:

- Assign parts from a standard parts list.
- Set processing options for the CAM - Manage Work Order Parts program (P13730).
- Set processing options for the Work Order Parts Detail program (P17730).

Understanding Parts Assignment

You can assign parts to a work order to satisfy parts requirements for maintenance tasks. Depending on how you set up the system, you can indicate how and when the system commits inventory to satisfy the parts requirements for a work order.

You can assign parts from a standard parts list that you enter when you create the work order. In addition, you can assign inventory parts that do not appear on a standard parts list, such as when you are creating a work order for an unanticipated emergency repair by using the Equipment Parts List program (P13017). You can also assign parts for which you do not maintain an inventory master, such as special order parts that you rarely need. All parts inventory information that is applicable to a work order appears on Work Order Parts List form.

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

You can also assign parts to a work order from the Equipment Parts List program. This is useful when you are carrying out a corrective repair and a standard parts list is not available for the particular job.

> **Note:** You can access the processing options for CAM - Manage Work Order Parts Program and Work Order Parts Detail by entering P13730 and P17730 in the Interactive Versions application.

Prerequisites

Verify that you have purchased and installed these systems. You must have installed these systems to be able to use Work Order Parts List form:

- System 30: JD Edwards EnterpriseOne Product Data Management.
- System 31: JD Edwards EnterpriseOne Shop Floor Management.
- System 40: JD Edwards EnterpriseOne Inventory Base and Order Processing.
- System 41: JD Edwards EnterpriseOne Inventory Management.
- System 43: JD Edwards EnterpriseOne Procurement.

Verify that standard parts lists are set up.

Verify that these fields on the Work Order Details form are complete before assigning parts from a standard parts list:

- Standard Parts or Instructions
- Start Date

Forms Used to Assign Parts to a Work Order

Form Name	FormID	Navigation	Usage
Search For Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Search for or add equipment work orders.

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Form Name	FormID	Navigation	Usage
Work Order Parts - Manage [work order description]	W13730A	Select the Parts tab on the Work Order - Manage [work order description] form.	Review or revise parts detail for work orders. Assign parts from a standard parts list. Accept the values or enter different values for parts lists.
Copy Screen	W17730D	Click the Copy BOM link on the Work Order Parts - Manage [work order description] form.	Copy Bill of Material information.
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry	Locate work orders.
Work Order Parts List Revisions	W17730A	Select a record on the Work With Work Orders form, and then select Parts Detail from the Row menu.	Assign parts from a standard parts list. Accept the values or enter different values for parts lists.
Copy Screen	W17730D	Select Copy BOM from the Form menu on the Work Order Parts List Revisions form.	Copy Bill of Material information.

Assigning Parts from a Standard Parts List

Access the Work Order Parts - Manage [work order description] form.

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Work Order Parts - Manage R/R Accessory (1599)

Work Order   Parts   Labor   Solution   Status History   Related Actions

Detail

Save Changes	Undo Changes	Print	Close

Work Order Detail

Order Number	1599	Branch / Plant	M30	Eastern Manufacturing Center
Equipment Number	2300	Planned Finish Date		
Inventory Item Number		Site Number	4242	
Customer Number	4242			

Parts Detail   Order Delivery Information   Purchase Order   Item Availability

More Form Actions:	-- Select One --	More Row Actions:	-- Select One --

Records 1 - 2

		Inventory Item Number	Description	Description Line 2	Estimated Quantity	Actual Quantity	Planned Finish Date
☐		30590	Safety Switch		1		
☐							

Setting Processing Options for the CAM - Manage Work Order Parts Program (P13730)

Use these processing options to supply the default values for the CAM - Manage Work Order Parts program.

Display

This processing option specifies whether to display certain fields.

1. Supplier Recovery

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Specify whether to hide the fields that are related to supplier recovery information. Values are:

Blank: Hide the Supplier Recovery fields.

1: Do not hide the Supplier Recovery fields.

Process

These processing options specify the default values for processing work-order parts detail.

1. Labor Details
Specify whether the system creates labor detail records when you create parts detail lines for a work order. Values are:

Blank: Do not create labor detail records.

1: Create labor detail records.

2. Substitute Processing Method
Specify the substitute processing method that the system uses when attaching parts detail information to a work order. Values are:

Blank: Do not use substitutes for shortages.

1: Use substitutes for shortages.

2: Display the Substitute Availability form when the substitute quantity can cover the shortage.

3. Commitment Processing
Specify whether the system generates component commitments when the parts detail is attached to the work order.

This feature is based on the commitment control settings that are stored in the Job Shop Manufacturing Constants table (F3009). Values are:

Blank: Use the commitment control settings in the Job Shop Manufacturing Constants table.

1: Do not use commitment processing.

4. Component's generic text
Specify whether to copy the text attachment for a component line item to the work order parts detail. Values are:

Blank: Do not copy the text attachment.

1: Copy the text attachment.

5. Prior Revision Levels
Specify whether to enable the attachment of prior revision levels. Values are:

Blank: Do not enable the attachment of prior revision levels.

1: Enable the attachment of prior revision levels.

6. Inventory search form exit (P40ITM2)
Specify which form the system accesses when you select the Form menu to search for inventory. Values are:

Blank: Item Search by Branch

1: Item Search by Supplier / Item

7. Material status code to:

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Enter a value from UDC 31/MS (Material Status) that specifies the status code that the system uses to update the material status of components on the work-order parts detail.

Warehousing

These processing options specify the default values to use with the warehousing options for parts.

1. Request processing mode:

Specify whether the system generates a warehouse pick request for the items on the parts detail. Values are:

Blank: Do not generate a pick request.

1: Generate a pick request only.

2: Generate a pick request and process it using the subsystem.

> **Note:** To use this processing option, you must complete all warehouse setup and ensure that warehouse control is activated in the Branch/Plant Constants program (P41001).

2. Version for Location Selection Driver (R46171)

If processing pick requests through the subsystem, enter the version of Location Selection to use.

Blank: XJDE0007

3. Default staging location

Specify the location that the parts that are picked from the warehouse are staged prior to use within manufacturing.

4. Default Staging Location for Availability

Specify the default location, if the part is available a request will *not* be generated.

This option applies only to parts without work center locations. Values are:

Blank: Do not verify part availability in the default staging location.

1: Verify part availability in the default staging location.

Versions

These processing options specify the programs to launch from the Work Order Parts Detail program.

1. Work Order Labor Details - P13732

Specify the version to use of the Work Order Labor Details program. If you leave this processing option blank, the system uses ZJDE0001.

2. Work Order Inventory Issues - P31113

Specify the version to use of the Work Order Inventory Issues program. If you leave this processing option blank, the system uses ZJDE0001.

EM Edits

Equipment Maintenance processing options specify default values for purchase order options.

1. Purchase Order Creation

Specify whether the system enables you to create a purchase order from the Work Order Parts Detail program (P13730). Values are:

Blank: Do not enable creation of purchase orders.

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1: Enable creation of purchase orders.

2. Purchase Order Message Consolidation by Vendor

Specify, when creating purchase orders, whether the system creates an order for each detail line or consolidates the detail lines by vendor onto an order. Values are:

Blank: Do not consolidate all detail lines.

1: Consolidate all detail lines.

Line Type for Non-Catalogued Items

Specify the line type that the system uses when copying noncataloged parts from the Intelligent Graphic Solution (IGS) program to the work order parts detail.

Enter a line type code from the Line Type Constants program (P40205).

Blank: The system uses the line type that is defined within IGS.

> **Note:** The Intelligent Graphic Solution (IGS) feature has been deprecated to address the bugs 21198035, 21198026, and 21198043.

EM Versions

Equipment Maintenance Versions processing options specify the versions of programs to launch from the Work Order Parts Detail program (P17730).

1. Supplier Master - P04012 (Not applicable in this release)

Specify the version of the Supplier Master program (P04012).

Blank: ZJDE0001

2. Open Order Inquiry - P4310

Specify the version for the Purchase Order Inquiry program (P430301).

Blank: ZJDE0006

3. Supply and Demand Inquiry - P4021

Specify the version for the Supply and Demand Inquiry program (P4021).

Blank: ZJDE0003

4. Item Availability by Time - P3413

Specify the version of the MPS Time Series program (P3413).

Blank: ZJDE0002

5. Purchase Order Entry - P4310

Specify the version of the Purchase Orders program (P4310).

Blank: ZJDE0001

6. Equipment Parts List Search and Select - P13017S

Specify the version of the Equipment Parts List Search and Select Inquiry program (P13017S) that you access from the Work Order Parts Detail form.

Blank: ZJDE0001

7. Work Order Pick List - R13415

Specify the version of the Work Order Pick List program (R13415) that you access from the Work Order Parts Detail form.

Blank: XJDE0001

Export

These processing options specify the default values for export and change transactions.

1. Transaction Type for the export transaction
Enter a value from UDC 00/TT (Transaction Type) that specifies the transaction type that the system uses for export processing or for supply chain scheduling and planning.

Blank: Do not use export processing.

2. Before Image Processing (Future)
Specify whether the before image of the record is to be written for change transactions. Values are:

Blank: Do not write before image for change transactions.

1: Write before image for change transactions.

Setting Processing Options for the Work Order Parts Detail Program (P17730)

Use these processing options to supply the default values for the Work Order Parts Detail program. Most of the processing options are the same as those for P13730; only the differences are discussed here.

See *Setting Processing Options for the CAM - Manage Work Order Parts Program (P13730)*.

Display

1. Billable Amounts Fields
Specify whether to hide the fields that are related to billable amounts information. Values are:

Blank: Hide the billable amounts fields.

1: Display the billable amounts fields.

2. Payable Amounts Fields
Specify whether to hide the fields that are related to payable amounts information. Values are:

Blank: Hide the payable amounts fields.

1: Display the payable amounts fields.

Process

5. Component Inclusion when performing a Copy
Specify whether the system includes all components when you copy orders.

Blank: Include all components.

1: Include only selected components.

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Versions

This processing option specifies the programs to launch from the Work Order Parts Detail program.

1. Work Order Labor Details - P17732

Specify the version to use of the Work Order Labor Details program.

Blank: ZJDE0001

Selecting Parts from Inventory

This section provides an overview of parts selection from inventory, lists a prerequisite, and discusses how to:

- Select parts from inventory.
- Revise the location for a part.
- Select a substitute part.

Understanding Parts Selection from Inventory

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

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

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

Prerequisite

Set up substitute parts through the Inventory Cross Reference program.

See *"Setting Up Item Cross-References" in the   JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*   .

Forms Used to Select Parts from Inventory

Form Name	FormID	Navigation	Usage
Search For Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Search for or add equipment work orders.

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Form Name	FormID	Navigation	Usage
Work Order Parts - Manage [work order description]	W13730A	Select the Parts tab on the Work Order - Manage [work order description] form.	Select parts from inventory. To update the material status on the Work Order Parts List, select Update Parts Status from More Row Actions. The status is defined in the processing options for Work Order Parts Detail (P13730). You can use the status change along with the R13415 processing options (Material Status From, and Material Status Thru) to selectively print certain lines on the parts list.
Work With Work Order Location Search	W3130A	Select the record for a part for which you want to revise the location on the Work Order Parts - Manage [work order description] form, and then select Location Search from More Row Actions.	Revise the location for a part.
Component Item Substitutions	W31042A	Select the record for a part for which you want to substitute on the Work Order Parts - Manage [work order description] form, and then select Item Substitutes from More Row Actions.	Select a substitute part.
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry	Locate work orders.
Work Order Parts List Revisions	W17730A	Select the record on the Work With Work Orders form, and then select Parts Detail from the Row menu.	Select parts from inventory. To update the material status on the Work Order Parts List, select Update Parts Status from the Row menu. The status is defined in the processing options for Work Order Parts Detail (P17730).

Selecting Parts from Inventory

Access the Work Order Parts - Manage [work order description] form.

Delivery

Select the Order Delivery Information tab.

You can add delivery information on the work order parts header or against detail lines on the parts list. Also, you can print delivery information on the Work Order Parts List (R13415).

Location Category Code 1

Enter a code that identifies a location category code.

Deliver To

Enter the address number of the person who receives the goods that are ordered.

The delivered to address might differ from the ship to address when ordered goods are processed through a distribution center (which is the delivered to address) before reaching their final destination (the ship to address).

Delivery Date

Enter the date that the customer took delivery of the product.

It is the effective date that is used for determining freight charges.

Delivery Time

Enter the amount of time that has elapsed between the date and time that you enter the case and the date and time that you assign the case.

Delivery Instructions Extended

Enter any delivery instruction text.

The system prints extended delivery instructions on the Material Pick List.

Revising the Location for a Part

Access the Work With Work Order Location Search form.

To revise the location for a part:

1. Select an alternate location for the part and click Select.
2. On Work Order Parts List Revisions, click OK to accept the change.

The system replaces the original location information with the new information.

> **Note:** You can specify multiple locations for a part. On Work Order Parts List, select Multi-Location. A window opens, indicating all of the locations that stock the part. Select the locations that you want to add. The system adds the new locations to the parts list and updates the on-hand quantity.

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Selecting a Substitute Part

Access the Component Item Substitutions form.

Assigning Labor to a Work Order

This section provides an overview of labor assignment, lists prerequisites, and discusses how to:

- Copy labor details from standard instructions.
- Assign labor details manually.
- Set processing options for the CAM - Manage Work Order Labor program (P13732).
- Set processing options for the Work Order Labor Detail program (P17732).

Understanding Labor Assignment

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

After you have created a work order, you can manually assign labor details for any task for which you have not set up standard instructions.

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

You can delete any work order from the system unless it has any of these characteristics:

- It is used as a parent work order.
- It has any account ledger transactions associated with it.
- It has a parts list or labor detail attached.

Note: You can access the processing options for the CAM - Manage Work Order Labor and Work Order Labor Detail programs by entering P13732 and P17732 in the Interactive Versions application.

Prerequisites

To use labor detail for work orders, verify that you have purchased and installed these required systems:

- System 30: JD Edwards EnterpriseOne Product Data Management.
- System 31: JD Edwards EnterpriseOne Shop Floor Management.
- System 40: JD Edwards EnterpriseOne Inventory Base and Order Processing.
- System 41: JD Edwards EnterpriseOne Inventory Management.
- System 43: JD Edwards EnterpriseOne Procurement.

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Forms Used to Assign Labor to a Work Order

Form Name	FormID	Navigation	Usage
Search For Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Search for or add equipment work orders.
Work Order Labor - Manage [work order description]	W13732A	Select the Labor tab on the Work Order - Manage [work order description] form.	Review or revise labor detail for work orders. Assign labor details from standard instructions. Accept the values or enter different values for labor details.
Copy by Item	W17732A	Click the Copy by Item link on the Work Order Labor - Manage [work order description] form. On Copy by Item, you can accept the values or enter different values. The system completes the Work Order Labor Details form with values from the standard instructions.	Copy labor detail information from standard instructions.
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry	Locate work orders.
Work Order Labor Details	W17732D	Locate a record on the Work With Work Orders form, and select Labor Detail from the Row menu.	Assign labor details.

Copying Labor Details from Standard Instructions

Access the Copy by Item form.

Click OK to copy the standard instructions for the displayed item and branch/plant to the work-order labor details.

You can accept the values on the Copy by Item form or enter different values. The system completes the Work Order Labor Details form with values from the standard instructions.

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On Work Order Labor Details, make any additional changes and click Save Changes.

Assigning Labor Details Manually

Access the Work Order Labor Details form.

Select the applicable instructions to attach to the work order, and click Save Changes.

Setting Processing Options for the CAM - Manage Work Order Labor Program (P13732)

Use these processing options to supply the default values for the CAM - Manage Work Order Parts program.

Process

1. Parts Detail

Specify whether the system creates parts detail records when you create labor detail lines for a work order. Values are:

Blank: Do not create parts detail records.

1: Create parts detail records. The system stores the parts detail information in the Work Order Parts List table (F3111).

2. Operation's Generic Text

Specify whether the system copies the generic text of an operation and attaches it to a work-order labor detail record. Values are:

Blank: Do not copy the generic text.

1: Copy and attach the generic text.

3. Queue and Move Hours

Specify whether the system enters the queue and move hours from the work center into the Work Order Labor Detail program (P13732) when the queue and move hours are blank in the Work With Routing Master program (P3003). Values are:

Blank: Do not enter the queue and move hours from the work center.

1: Enter the queue and move hours from the work center only when those fields are blank in the Routing Master program.

2: Enter the queue and move hours from the work center only when you manually add a routing step or instruction in the detail area for work orders.

4. Address Search Type for employees

Enter a value from UDC 01/ST (Search Type) that the system uses to search for an employee.

Blank: E

Display

1. Supplier Recovery

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Specify whether to hide the fields that are related to supplier recovery information. Values are:

Blank: Hide the fields.

1: Display the fields.

Defaults

This processing option specifies the time basis code.

1. Time Basis Code
Enter a value from UDC 30/TB (Time Basis Code) that the system uses as the default value.

Blank: U

Export

This processing option specifies the export transaction type.

1. Transaction Type
Enter a value from UDC 00/TT (Transaction Type) that specifies a transaction type for a work order to use for export processing or for supply chain scheduling and planning.

Blank: Do not use export processing.

Versions

These processing options specify the versions of programs to launch from the Work Order Labor Details form.

1. Capacity Load program (P3313)
Specify the version of the Capacity Load program (P3313).

The system uses this program to identify the capacity load in a work center for a specific operation in the work order routing.

Blank: ZJDE0003

2. Equipment Master Workbench (P1701)
Specify the version of the Work with Equipment Master program (P1701).

Blank: ZJDE0001

Setting Processing Options for the Work Order Labor Detail Program (P17732)

Use these processing options to supply default values for the Work Order Labor Detail program. Most of the processing options are the same as those for P13732; only the differences are discussed here.

See *Setting Processing Options for the CAM - Manage Work Order Labor Program (P13732)*.

Process

These processing options specify the default values for labor processing.

3. Queue and Move Hours

ORACLE

Specify whether the system enters the queue and move hours from the work center into the Work Order Labor Detail program (P17732) when the queue and move hours are blank in the Work With Routing Master program (P3003). Values are:

Blank: Do not enter the queue and move hours from the work center.

1: Enter the queue and move hours from the work center only when those fields are blank in the Routing Master program.

2: Enter the queue and move hours from the work center only when you manually add a routing step or instruction in the detail area for work orders.

Display

These processing options specify whether the system displays certain fields.

1. Billable Fields
Specify whether the system displays the billable-related fields in the labor detail area. Values are:

Blank: Display the billable-related fields.

1: Hide the billable-related fields.

2. Payable Fields
Specify whether the system displays the payable-related fields in the labor detail area. Values are:

Blank: Display the payable-related fields.

1: Hide the payable-related fields.

3. Hide Contract-related fields
Specify whether the system displays the contract-related fields, such as:

- Customer Number
- Site Number
- Entitlement Check
- Coverage Group
- Percentage Covered

Values are:

Blank: Display the contract-related fields.

1: Hide the contract-related fields.

Versions

2. Work with Activity Based Costing Workbench (P1640)
Specify the version of the Activity Base Costing Workbench program (P1640).

Blank: ZJDE0001

4. Work Order Process Resource Revisions (P3111P) (Future)
Specify the version of the Work Order Process Resource Revisions program (P3111P).

Blank: ZJDE0001

Creating Work Orders Using the Work Order Entry Programs (P48201 and P17714)

This section provides an overview of work orders, lists prerequisites, and discusses how to:

- Enter work orders using the Work Order Entry programs.

- Set processing options for the Work Order Revisions program (P17714).

See *"Setting Processing Options for Work With Work Orders (P48201)" in the   JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

Understanding Work Orders

You create work orders to formally request and schedule corrective maintenance, such as emergency repairs, and to record and communicate information about all of the details pertaining to the maintenance task. You would create a work in these circumstances:

When you set processing options for the Work With Work Orders program (P48201), enter an address book number in the Originator field on the Defaults 3 tab. The system uses this address book number to search for work orders that were entered by a user. To display all of the work orders when you click Find on Work With Work Orders, type **0** in this field.

For Service Management, you can enter the document type that you want the system to use for work orders on the Defaults 2 tab. This document type can be overridden if the work order is entitled by a contract.

> **Note:** You can access the processing options for Work Order Revisions by retrieving P17714 in the Interactive Versions application.

> **Note:**
>
> - *"Entering Basic Work Order Information" in the   JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

Prerequisites

The prerequisites for the Work Order Entry program are the same as for the Planning Workbench.

Forms Used to Create Work Orders Using the Work Order Entry Programs

Form Name	FormID	Navigation	Usage
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry	Locate or add work orders.
Work Order Revisions	W17714A	Click Add on the Work With Work Orders form.	Enter work orders using the Work Order Entry programs.

Entering Work Orders Using the Work Order Entry Programs

Access the Work Order Revisions form.

Select the Order Detail, Planning, Classification, and Accounting tabs.

> **Note:**
>
> Based on the business unit, the system checks the alternate tax rate/area assignment company constant setup for the corresponding company. If the functionality is enabled, the system retrieves the alternate tax rate/area assignment based on the business unit and site countries setup. Otherwise, the system retrieves the tax rate/area from the default site setup.
>
> For further information about alternate tax rate/area assignment functionality, please refer to *"Setting Up Alternate Tax Rate/Area Assignment Functionality" in the*
>
> *JD Edwards EnterpriseOne Applications Tax Processing Implementation Guide*
> .

Setting Processing Options for the Work Order Revisions Program (P17714)

Use these processing options to supply default values for the Work Order Revisions program. Most of the processing options are the same as those for P13714, so only the differences are discussed here.

See *Setting Processing Options for the CAM - Manage Equipment Work Orders Program (P13714)*.

Defaults

5. Manager

Specify the address book number of a manager or a planner that the system uses as a default when you enter a work order.

20. Override Address Visual Assist

Use this processing option to override the visual assist on the address fields on the Work Order Revisions form. If you leave this processing option blank, the system uses the default visual assist defined on the data dictionary item. Values are:

Blank: Use the default visual assist from the address data item.

1: Use A/B Word Search (P01BDWRD) as the visual assist for address fields.

Process

These processing options define the processing that the system performs for this version of Work Order Revisions (P17714).

1. Default Manager

Specify the default values for manager and supervisor addresses on the work order. Values are:

Blank: The system does not supply defaults for the manager and supervisor addresses.

1: The system uses defaults for the manager and supervisor addresses based on this hierarchy:

First: The system uses the values for the manager and supervisor from processing options.

Second: The system uses the manager value from the SWM Address Book extension record for the customer.

Third: The system uses the manager value from the equipment record.

Fourth: The system uses the values for the manager and supervisor from the Work Order Default Coding File table (F48001), based on category codes 1, 2, and 3 from the work order.

> **Note:** The system uses the Assigned To address value from processing options first and information from the equipment record second.

12. Create Work Order Tag files (future)

Specify whether the system creates the interoperability table (F4801Z). Values are:

Blank: Do not create the interoperability table.

1: Create the interoperability table (F4801Z).

13. Email Service Provider

Specify whether the system sends an email message to the primary service provider when you create a work order. Values are:

Blank: Do not send a message.

1: Send a message.

18. Create Individual Resource Assignments

Specify whether to automatically create individual resource assignments based on the Assigned To (ANP) address book number on the form.

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The system validates the address book number against the Resource Master table (F48310). Values are:

Blank: Do not create assignments.

1: Create assignments.

21. Status Code to Remove Resource Assignments
Specify a user-defined code from the UDC table (00/SS) to automatically remove resource assignments associated with the work order when you change the status of the work order. For example, when you change the status of a work order to cancel, the resource assignments associated with it are removed.

If you leave this processing option blank, the system does not remove resource assignments associated with the work order.

Self Service

These processing options enable you to specify default values for working with self-service processing on the web.

1. Default Responsible Business Unit
Specify the default responsible business unit that the system uses when you enter a customer self-service work order.

2. Default Branch
Specify the default branch that the system uses when you enter a customer self-service work order.

3. Enable Customer Number Field
Specify whether the system enables the customer number field on the Customer Self Service form. Values are:

Blank: Do not enable the customer number field.

1: Enable the customer number field.

4. Default Customer Number
Specify whether to use the user address book number as the default customer when you create a work order for customer self service. Values are:

Blank: Do not use a default customer.

1: Use the user address book number as the default customer.

Versions

27. Work With Work Order History (P17715) version
Specify the version of the Work With Work Order History program (P17715) that the system uses to verify existing work orders and prevent duplicate work orders for an equipment number.

Blank: ZJDE0001

28. Work Order Quote (P17717) version
Specify the version of the Online Work Order Quote Inquiry program (P17717) that the system uses after you enter the work order.

Blank: ZJDE0001

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> **Note:**
>
> - *"Entering Basic Work Order Information" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide .*
>
> - *"Setting Processing Options for Work With Work Orders (P48201)" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide .*

Creating Work Orders for Unscheduled Maintenance

This section provides an overview of unscheduled maintenance, lists prerequisites, and discusses how to create a work order for unscheduled maintenance.

Understanding Unscheduled Maintenance

When you set up maintenance tasks on an as-needed basis rather than a scheduled interval, you can create a work order to perform the tasks. The maintenance task that you use requires a model work order, which the system uses to create the work order for the unscheduled maintenance.

Prerequisites

Set up a PM service type for each unscheduled maintenance task, and verify that the service type has no schedule date or service interval.

Set up model work orders.

See *Creating Model Work Orders*.

See *Creating a PM Schedule*.

Forms Used to Create Work Orders for Unscheduled Maintenance

Form Name	FormID	Navigation	Usage
Search For Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Search for or add equipment work orders.
Work Order Labor - Manage [work order description]	W13732A	Specify the work order as a model on the Work Order - Manage [work order description] form.	Modify a work order for unscheduled maintenance.

ORACLE

Form Name	FormID	Navigation	Usage
Work With Unscheduled Maintenance	W13UMB	Select Unscheduled PMs from the Form menu on the Search For Equipment Work Orders form.	Create a work order for unscheduled maintenance.
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry	Locate work orders.
Work Order Revisions	W17714A	Specify the work order as a model.	Modify a work order for unscheduled maintenance.

Creating a Work Order for Unscheduled Maintenance

Access the Work With Unscheduled Maintenance form.

The Work With Unscheduled Maintenance form appears, displaying all of the unscheduled maintenance service types that are set up for the equipment.

Work Order Type
Enter a value that controls the type of work order that is created, as defined by document type maintenance.

ORACLE

18 Processing Work Orders

Understanding Work Order Processing

You can review existing work orders and update the life cycle information for work orders as necessary. You can approve work orders and track the costs that are associated with work orders, such as parts and labor costs.

The life cycle of a work order consists of the steps or statuses through which a work order must pass, indicating the progress of the work. For example, the life cycle might include these statuses:

- Work order request
- Work order approval
- Materials pending
- Work in progress
- Work order complete
- Work order closed

You can also perform a variety of tasks to manage work orders as they move through the life cycle, including:

- Searching for specific work orders or groups of work orders.
- Revising information as work orders move through the life cycle and as demands on the organization change.
- Reviewing information about the parts lists for work orders.
- Printing copies of work orders for use by maintenance staff.
- Changing the status of work orders.

Prerequisite

Set up all users of work order programs to be service providers. This action is necessary for the CAM - Manage Equipment Work Order program (P13714) and the Work Order Revisions program (P17714) to function.

Locating Work Orders

This section provides an overview of work order searches and discusses how to set processing options for the Work With Equipment Work Orders program (P13220).

Understanding Work Order Searches

You can use a variety of search criteria to locate work orders in the maintenance organization. You can locate work orders by using Work Order Entry program or Equipment Backlog program. The method that you select depends on the

ORACLE

information that you know about the work orders that you want to locate, as well as the tasks that you want to perform after you locate the work orders.

You can complete multiple tasks with a single work order. For example, after you locate a work order, you can access the Work Order Inventory Issues program, which enables you to issue parts to the work order.

You can search for equipment by:

- Company
- Equipment status
- Description
- Responsible business unit
- Location
- Category codes

When you use the backlog, you can quit to these programs:

- Equipment Master
- Location Transfer
- Parent History Inquiry
- Search Like Equipment
- Message Log
- Cost Summary
- Location History
- License Information
- Work Order Backlog
- Equipment Backlog
- Supplemental Data
- PM Schedule
- PM Backlog

Searches Using Work Order Entry

You can use the Work Order Entry program to locate work orders in the maintenance organization by entering a variety of search criteria. You can also complete multiple tasks with a single work order. For example, after you locate a work order, you can access a program that enables you to revise the parts list.

You can review work order information that is not specific to a piece of equipment or a category of equipment. You can use any combination of the information that is shared among work orders to locate them. For example, you can locate all the work orders for a business unit that is assigned to a particular supervisor. Depending on how you set up the system and on the processing options that are in effect, the system enters ***** in many of the search fields, such as:

- Status
- Supervisor
- Manager (Planner)
- Customer

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- Originator

You can perform a broad, relatively unfiltered search for work orders by accepting the wildcard values, rather than completing specific search fields. To search for work orders with specific characteristics, use tabs on the search form to access the appropriate data field.

Information that you can use to locate work orders includes:

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

You can perform a variety of tasks, including:

- Create a work order for unscheduled maintenance.
- Review a summary of equipment failures and downtime.
- Review or revise work order text.
- Review a summary of estimated and actual work order costs.
- Review a summary of selected work orders that appear:

  ○ The number of work orders that meet the criteria.

  ○ The estimated hours to complete all of the work orders.

  ○ The estimated average number of hours that is needed to complete each work order.

- Review parts and labor detail.
- Review open purchase orders for work orders.
- Issue parts to a work order.

Searches Using Equipment Backlog

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

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

- Access a work order master.
- Create a work order for unscheduled maintenance.

Forms Used to Locate Work Orders

Form Name	FormID	Navigation	Usage
Search for Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Locate work orders in the maintenance organization.
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry	Locate work orders in the maintenance organization.
Work With Equipment Work Orders	W13220A	Work Order (G1316), Equipment Backlog	Locate work orders that are associated with a particular piece of equipment or a group of equipment.

Setting Processing Options for the Work With Equipment Work Orders Program (P13220)

This section discusses how to set processing options for the Work With Equipment Work Orders program (P13220).

Use these processing options to supply the default values for the Work With Equipment Work Orders program.

Defaults

These processing options specify the beginning and ending status codes for a range of work orders.

1. From Status

Enter a value from user-defined code (UDC) table 00/SS (Work Order Status) that specifies the beginning status code for a range of work orders.

The system uses this default when searching for work orders.

2. Thru Status

Enter a value from UDC 00/SS (Work Order Status) that specifies the ending status code for a range of work orders.

The system uses this default when searching for work orders.

Categories

These processing options specify category codes for equipment work orders.

1. Major Accounting Class,2. Major Equipment Class,3. Manufacturer,4. Model Year, 5. Usage Miles or Hours, and 6. Category Code 6, through 10. Category Code 10

Enter a value from the appropriate UDC that classifies assets into accounting classes. The system uses this default when searching for work orders.

Versions

These processing options specify the versions of programs to launch from equipment work orders.

1. Equipment Master (P1702) Version

Specify the version of the Equipment Master Revisions program (P1702). If you leave this processing option blank, the system uses ZJDE0001.

2. Work Order Entry (P17714) Version

Specify the version that the system uses for the Work Order Revisions program (P17714). If you leave this processing option blank, the system uses ZJDE0003.

3. Work Order Backlog (P48201) Version

Specify the version of the Work With Work Orders program (P48201) that the system uses. If you leave this processing option blank, the system uses ZJDE0001.

Revising Work Orders

This section provides an overview of work order revisions and discusses how to revise detail information for a work order.

Understanding Work Order Revisions

You can revise work orders as they move through the work order life cycle. The life cycle consists of the steps or statuses through which a work order must pass, indicating the progress of the work.

As information changes or new information becomes available, you can revise any information except the work order number. If you use work order approvals, you might not be able to change some life cycle statuses, depending on the system setup. Some revisions might include:

- Life cycle statuses.

- Planned start and completion dates (for example, if the labor resources or parts are not yet available).

- Percentage of work completed.

- Estimated hours to complete the work.

You can use search criteria to narrow the search to specific work orders that need revision, which is useful when you need to revise certain fields for a group of related work orders.

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Forms Used to Revise Work Orders

Form Name	FormID	Navigation	Usage
Search for Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Locate work orders in the maintenance organization.
Work Order - Manage [work order description]	W13714B	Locate and select a work order on the Search for Equipment Work Orders form.	Revise work orders. Revise detail information for a work order.
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry	Locate work orders.
Work Order Revisions	W17714A	Locate a work order on the Work With Work Orders form, and click Select.	Revise work orders. Revise detail information for a work order.

Revising Detail Information for a Work Order

Access the Work Order - Manage [work order description] form.

You can select any of the tabs to access fields that you need to revise.

Updating the Life Cycle Information of a Work Order

This section provides an overview of life cycle information and discusses how to change the status of a work order.

Understanding Life Cycle Information

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

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

- Work in progress

When you have completed all of the tasks that are requested on a work order, you can change the work order's status to complete. When you change the status of a work order to complete, the system provides a warning message that alerts you to any open purchase orders that are associated with the work order.

You can also close a work order to prevent transactions from being entered against it.

Forms Used to Update the Life Cycle Information of a Work Order

Form Name	FormID	Navigation	Usage
Search for Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Locate work orders in the maintenance organization.
Work Order - Manage [work order description]	W13714B	Locate and select a work order on the Search for Equipment Work Orders form.	Change the status of a work order.
Status Change	W17714C	Select the Planning tab on the Work Order Revisions form, complete the Status field, and then click Save Changes.	Change the status of a work order to indicate the progress of the tasks that are indicated on the order.
Work With Work Orders	W48201F	For Capital Management: Work Order (G1316), Work Order Entry For Service Management: Daily Work Order Processing (G1712), Work Order Entry	Locate work orders.
Work Order Revisions	W17714A	Select a work order on the Work With Work Orders form and click Select.	Change the status of a work order.

Changing the Status of a Work Order

Access the Status Change form.

Update Children Status

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Enter updated children status.

When you change the status of a piece of equipment, the system prompts you to update the status of the children of the equipment as well. Values are:

Blank: The default value is **N.**

Y: Update the status of the children with the parent item.

N: Do not update the children. Update only the equipment item that is being processed.

Reviewing the Status History of a Work Order

This section provides an overview of work order status history and discusses how to set processing options for the Status History program (P1307).

Understanding Work Order Status History

You can review a history of the statuses that you have assigned to a work order, such as new order, parts list attached, in progress, and so on. This is especially useful when you need to quickly review the status of a work order and determine how long a work order has been at various statuses in the work order life cycle. When you review the status history of a work order, you can also review:

- Remarks that were entered when you changed the work order status.
- The beginning dates, ending dates, and times of each status change.
- The hours that are associated with each occurrence of a particular status.

Processing options for the Status History program (P1307) enable you to revise existing remarks for any status change, enter a new remark if you did not do so when you changed the status, or protect the Remarks field from future revisions.

When you access the Work With Status History form, the system displays a history of each status that is assigned to the work order, from the creation of the work order to the present.

Form Used to Review the Status History of a Work Order

Form Name	FormID	Navigation	Usage
Work With Status History	W1307A	For Capital Asset Management: Work Order (G1316), Status History For Service Management: Daily Work Order Processing (G1712), Work Order Status History	Review status history information.

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Setting Processing Options for the Status History Program (P1307)

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

Process

1. Remarks

Specify whether the system protects the remarks field. Values are:

Blank: Allow modifications to the remarks field.

1: Protect the remarks field regardless of whether it contains text.

2: Protect the remarks field only if it contains text.

2. Work Day Calendar

Specify the work day calendar that the system uses to calculate the number of days for equipment analysis.

Defaults

1. Starting Effective Date

Specify the starting date that the system uses for downtime analysis in the Status History program (P1307).

The system uses this date when calculating the mean time between failures. Values are:

Blank: Use the acquired date from the equipment master.

1: Use the installation date from the equipment master.

> **Note:** If you select **1,** but the installation date is blank, the system uses the acquired date.

2. Equipment Downtime Status

Enter a value from UDC 12/ES (Status or Disposal Code) that indicates a downtime status in the Status History program (P1307).

The system uses this status when determining the mean time between failures.

Blank: Use the default from current status.

Versions

1. Work Order Revisions (P17714) Version

Specify the version that the system uses for the Work Order Revisions program (P17714).

Blank: ZJDE0003.

2. Equipment Master (P1702) Version

Specify the version that the system uses for the Equipment Master Revisions program (P1702).

Blank: ZJDE0001.

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Swapping Components

This section provides an overview of the Component Changeout program (P17STAT) and discusses how to swap a component.

Understanding the Component Changeout Program (P17STAT)

You can use the Component Changeout program for different purposes:

- For JD Edwards EnterpriseOne Capital Asset Management (CAM), you can swap components.
- For JD Edwards EnterpriseOne Service Management, you can exchange a piece of equipment.

For JD Edwards EnterpriseOne CAM, to simplify moving equipment components from parent to parent, you can swap an equipment component for another component on a work order. When you swap a component, you can specify changes that you want to make to the parent and component relationships for each component. For example, you might need to install a new exhaust fan in Production Line 1 while you service the old exhaust fan. You can update the parent and component relationships to indicate that the new exhaust fan is now a component of Production Line 1.

When you swap components, you can update the status of each component that is affected by the swap. For example, you can indicate a status of **Down** for the exhaust fan that you removed from Production Line 1 and a status of **Working** for the new exhaust fan that you installed.

You can also revise the responsible business unit of the old component. In addition, you can revise the location information for either component. When you revise the location information for the new component, you can specify a location or use the location of the component's parent.

For JD Edwards EnterpriseOne Service Management, when a customer returns a piece of equipment for repair, and the service technician decides that the repair is more costly than a replacement, you can indicate that the equipment was replaced on the work order. You must add a return material authorization to record the shipment of the new equipment. The component change-out optionally changes the owner, site, responsible business unit, and contract coverage of the replaced component and the new component.

Forms Used to Swap a Component

Form Name	FormID	Navigation	Usage
Search for Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Locate work orders in the maintenance organization.
Work Order - Manage [work order description]	W13714B	Locate and select a work order on the Search for Equipment Work Orders form.	Change the status of a work order.
Component Changeout	W17STATC	Click the Related Links link on the Work Order	Swap a component.

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Form Name	FormID	Navigation	Usage
		- Manage [work order description] form. Select Swapping Component.	
Work Order Revisions	W17714A	Locate the work order on the Work With Work Orders form, and click Select.	Revise work orders

Swapping a Component

Access the Component Changeout form.

Start Effective Date
Enter the date on which an address, item, transaction, or table record becomes active.

The meaning of this field differs, depending on the program. For example, the effective date can represent:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Replaced Component
Enter an identification code that represents an asset. You enter the identification code in one of these formats:

- Asset number (a computer-assigned, eight-digit, numeric-control number).
- Unit number (a 12-character alphanumeric field).
- Serial number (a 25-character alphanumeric field).

Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character that you enter indicates whether you are entering the primary (default) format that is defined for the system, or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format that you are using. You assign special characters to asset number formats in the fixed assets constants.

New Component
Enter an identification code that represents an asset.

You enter the identification code in one of these formats:

- Asset number (a computer-assigned, eight-digit, numeric-control number).
- Unit number (a 12-character alphanumeric field).
- Serial number (a 25-character alphanumeric field).

Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character that you enter indicates whether you are entering the primary (default) format that is

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defined for the system, or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format that you are using. You assign special characters to asset number formats in the fixed assets constants.

Move Children

Enter a code to indicate whether the children of the component being changed-out stay with the component. Values are:

On: Attach children to the new component

Off: Do not attach children to the new component

Detail From Parent

Enter a code that specifies whether the new component retrieves default values from the new parent.

Examples of default values are location, business unit, equipment status, customer, and site. Values are:

On: Retrieve default values from the new parent.

Off: Do not retrieve default values from the new parent.

Replaced Component

Select the Replaced Component tab. For new components, select the New Component tab.

Update Children

Enter information to update the status of the children of a piece of equipment when you change the status of the piece of equipment. Values are:

Blank: The default value is **N.**

Y: Update the status of the children with the parent item.

N: Do not update the children. Update only the equipment item that is being processed.

Create Work Order

Enter a code to determine whether the system creates a work order for the old component when you do a component change-out.

When the system creates a work order, it uses default values from the processing options from the ZJDE0001 version of Work Order Entry (P48011). Values are:

Blank: Do not create a work order

1: Create a work order

On: Create a work order

Off: Do not create a work order

Reviewing Work Order Parts Lists

This section provides an overview of reviewing work order parts lists and discusses how to:

- Review a work order parts list.
- Set processing options for the Work Order Parts List Inquiry program (P3121).

Understanding Reviewing Work Order Parts Lists

Review work order parts lists to view the most current information about the parts requirements of the work orders. Use the Parts List Inquiry program to review information for individual work orders or a selection of related work orders. You can review:

- Parts requirements that are based on work order status.
- Parts requirements that are based on the start date.
- Parts with a negative availability.

Forms Used to Review Work Order Parts Lists

Form Name	FormID	Navigation	Usage
Work With Work Order Parts List	W3121A	For Capital Asset Management: Work Order (G1316), Parts List Inquiry For Service Management: Daily Work Order Processing (G1712), Parts List Inquiry	Locate parts lists.
Parts List Detail Inquiry	W3121B	Locate and select a work order on the Work With Work Order Parts List form, and then select Detail Inquiry from the Row menu.	Review a work order parts list.
Work with Supply and Demand	W4021B	Select a record on the Work With Work Order Parts List form, and select Supp/Dem Inquiry (Supply and Demand Inquiry) from the Row menu.	Determine which work orders are creating a demand for a part.

Reviewing a Work Order Parts List

Access the Parts List Detail Inquiry form.

Requirements
Enter a value to indicate whether to display all parts or only those parts with a requirement. Values are:

1: Display all parts.

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2: Display only those parts with a requirement.

Availability

Enter a value to indicate whether to display all parts or only those parts with a negative availability.

1: Display all parts.

2: Display only those parts with a negative availability.

Setting Processing Options for the Work Order Parts List Inquiry Program (P3121)

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

Versions

1. Purchase Order Inquiry Version (P4310)

Specify the version of the Purchase Orders program (P4310).

Blank: ZJDE0001.

2. Supply/Demand Version (P4021)

Specify the version for the Supply and Demand Inquiry program (P4021).

Blank: ZJDE0001.

3. Manufacturing WO Parts List (P3111)

Specify the version that the system uses when you select the row option to the Work Order Parts List program (P3111) from the Work With Manufacturing Work Orders form or the Work Order Details form.

Versions control how the Parts List program displays information. Therefore, you might need to specify the processing options to specific versions to meet your needs.

Blank: ZJDE0001.

4. Equipment/Service Order Parts List (P17730)

Specify the version of the Work Order Parts Detail program (P17730) that the system uses.

Blank: ZJDE0001.

Purchasing Parts for a Work Order

This section provides an overview of purchase orders from parts lists, lists a prerequisite, and discusses how to purchase a part for a work order.

Understanding Purchase Orders from Parts Lists

You can purchase parts for a work order by creating purchase orders directly from the work order parts list. This is particularly useful if a maintenance task requires parts that you do not usually keep in stock, such as unusually costly parts or parts that have long order lead times.

When you create purchase orders directly from the work order parts list, you can use processing options to specify the initial status of the purchase order, as well as the approval route for the purchase order. After the system creates the purchase order, the purchase order number and document type appear in the work order parts list.

When you create a purchase order for a piece of equipment for which you have defined a warranty service type, the system displays a warning message to alert you that a warranty is in effect.

Purchasing Parts on a Recurring Basis

When you need to purchase parts for which you have a recurring need, such as parts for PM work orders, you can create purchase orders by using JD Edwards EnterpriseOne Procurement, or you can generate purchase orders by using the parts planning features in JD Edwards EnterpriseOne Plant and Equipment Management.

Prerequisite

Verify that the processing options for the Work Order Parts List program are set to enable you to create purchase orders directly from the work order parts list.

Forms Used To Purchase Parts for a Work Order

Form Name	FormID	Navigation	Usage
Search for Equipment Work Orders	W13700B	Work Order menu (G1316), Planning Workbench	Locate work orders in the maintenance organization.
Work Order Parts - Manage [work order description]	W13730A	Locate and select a work order on the Search for Equipment Work Orders form, and then select the Parts tab.	Add or update a work order parts list.
Work With Work Orders	W48201F	Work Order (G1316), Work Order Entry	Locate work orders.
Work Order Parts List Revisions	W17730A	Select the work order, and then select Parts Detail from the Row menu.	Purchase a part for a work order.

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Purchasing a Part for a Work Order

Access the Work Order Parts - Manage [work order description] form.

To enter a purchased part on a work order:

1. For each part that you want to purchase, select the record, and then click the Create Purchase Order link.

   You can select multiple parts records. The system processes each row that is selected.
2. On the Work Order Parts - Manage [work order description] form, to review the purchase order, select the record, and then select the Purchase Order tab.
3. On the Work Order Parts - Manage [work order description] form, select the record, and then select Purchase Order Information from More Row Actions list.

   The system displays the Work with Order Details form.

Working with Work Orders on the Web

This section provides an overview of work orders on the web, lists prerequisites, and discusses how to enter work orders on the web.

Understanding Work Orders on the Web

As part of the company's internal or external service solution, you can provide customer self-service over the web. An internal customer might be an equipment operator or plant supervisor. An external customer might be a person who has purchased a home appliance with a warranty agreement.

Self-service enables customers to enter requests for maintenance or to report problems at any time. You can use the versions of Work Order Revisions (P17714) and Work With Work Orders (P48201) programs that are set up for self-service and enable customers to enter or review the status of work orders on the web.

> **Note:** The navigations, forms, steps, and data that appear in these tasks might not correspond to the configured self-service internet site.

Prerequisites

Before you complete the tasks in this section:

- Verify that you have set up address book records, including SWM extension records, as well as accounts receivable information, for customers to enter JD Edwards EnterpriseOne Service Management information.

- Verify that you have set up a user profile that limits customer access in the JD Edwards EnterpriseOne software to only the Customer Self-Service menu (G42314).

  The customers cannot sign in without a profile.

- Verify that you have set up the work order features, such as SWM constants, to process customer cases.

- Set the processing options in these programs to use customer self-service:

  - Work With Work Orders (P48201) to locate work orders.
  - Work Order Revisions (P17714) to enter work orders.
  - Equipment Search/Select (P17012S) to review associated parts and equipment.

    Reference the version of the Equipment Search/Select program that is set up for Customer Self-Service in the Work Order Revisions program.

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Form Used to Work with Work Orders on the Web

Form Name	FormID	Navigation	Usage
Self Service	W17714F	Daily Self-Service Processing (G1715), Work Order Entry	Enter work orders on the web.

Entering Work Orders on the Web

Access the Self Service form.

When you enter a work order, the work order document type and service type are based on the processing options or customer information.

Working with Work Orders on an iPad

This section provides an overview of field service work orders and discusses how to:

- Work with work orders on an iPad.

- Set processing options for field service work orders.

Understanding Field Service Work Orders

Field technicians often travel to a site to perform service and do not have access to a desktop or laptop but may be able to connect wirelessly on an iPad. They must be able to see their work assignments, know where they must go to perform the service, know the contact information of the service location, understand the nature of the problem, and have access to information that will help them perform the service. They must be able to access all of this information easily from the JD Edwards EnterpriseOne system. They must also be able to update the status of the work easily with minimal or no typing.

The Field Service Work Order application for JD Edwards EnterpriseOne was built to run on an iPad to support these unique needs of field service technicians while leveraging the features of an iPad. The Field Service Work Order application includes:

- The Field Service Inquiry program (P48100).

- The Field Service Revisions program (P17100).

You use these programs to review work orders and associated information, such as labor details, parts details, address book details, and so on. You set a processing option to view either service or equipment type work orders, depending on whether you are performing maintenance on customer-owned equipment or company-owned equipment. You can also set a processing option to view only work orders that are assigned to you. You can view information helpful in

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performing the service through media objects (text, documents, images, and so on). The system enables you to view maps of customer and service locations.

Updating the Status of a Work Order

You can easily update the status of a work order after you have finished working on it using push button functionality. When you choose this button, the system advances the work order status with the next status based on the work order activity rules and displays the text of the next status on the button. If work order activity rules are not applicable for your work order or if the status is complete and no more statuses are available, then this button does not appear.

> **Note:** If you get an error message in the Field Service Revisions program that the selected work order is locked, that means the work order is opened for editing in another program (record reservation).

Mobile Applications for Managing Work Orders

The following mobile applications are available, and can be used to manage work orders on a mobile device:

- Manage My Work Orders (Tablet and Smartphone)

- Manage My Work Orders Disconnected (Tablet and Smartphone)

- Review Team Service Orders (Tablet and Smartphone)

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

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

- *Manage My Work Orders Mobile Applications*

- *Review Team Service Orders Mobile Applications*

Forms Used to Work With Work Orders on an iPad

Form Name	FormID	Navigation	Usage
Work With Field Service	W48100A	Enter P48100 in the Fast Path field.	You can: • Search and select work orders. • Choose the Customer Number link to view a map of the customer's location. • Choose the Site Number link to view a map of the service location.

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Form Name	FormID	Navigation	Usage
Work With - Manage Work Order	W17100A	On the Work With Field Service form, select a work order and choose Select.	You can: • Update work order status. • Choose the Customer link to view a map of the customer's location. • Choose the Site link to view a map of the service location. • View, add, update, or delete media objects.
Work Order Parts Inquiry	W17100B	On the Work With - Manage Work Order form, choose the Parts button.	Review parts details for work orders.
Work Order Labor Inquiry	W17100C	On the Work With - Manage Work Order form, choose the Labor button.	Review labor details for work orders.

Updating Work Orders

Access the Work With - Manage Work Order form.

> **Note:** Choose the Advance Status button to advance the work order to the next status as set up in the Work Order Activity Rules. If Work Order Activity Rules are not applicable for the work order or if the work order is at completed status and no more statuses are available, this button does not appear.

Customer

The system populates this field with a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Choose the Customer link to view a map of the customer's location.

Site

The system populates this field with a unique numeric identifier for a physical location at which utility service is delivered. A service address often corresponds to a parcel of land or a unit in an apartment building. The system assigns this identifier through Next Numbers if it is not provided when a new service address is added.

Choose the Site link to view a map of the site location.

Contact Name

The system populates this field with the name of the customer or a contact person.

Prefix

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The system populates this field with the first segment of a telephone number. In the U.S., the prefix is the three-digit area code.

Contact Phone

The system populates this field with a phone number without the prefix or special characters, such as hyphens or periods, that makes up the telephone number for an entity. You can use any applicable telephone number format for a country. This field is used in conjunction with the Prefix field (AR1).

When you search for an address using a phone number, you must enter the number exactly as it is set up in the JD Edwards Address Book system, including any special characters.

Equipment Number

The system populates this field with an identification code that represents an asset. The identification code can be in any one of these formats:

Asset number (a computer-assigned, eight-digit, numeric control number).

Unit number (a 12-character alphanumeric field).

Serial number (a 25-character alphanumeric field).

Failure Description

The system populates this field with a description of the customer's issue.

Priority

The system populates this field with a value from UDC 00/PR (Work Order Priority) that indicates the relative priority of a work order in relation to other orders.

Status

The system populates this field with a value from UDC 00/SS (Work Order Status) that describes the status of a work order.

Any status change between 90 through 99 triggers the system to automatically update the completion date.

Requested Finish Date

The system populates this field with the date on which the work order is planned to be completed.

This date can be calculated based on contract coverage.

Requested Finish Time

The system populates this field with the time that the work order is scheduled to be completed.

Setting Processing Options for Field Service Work Orders

This table lists the processing options that you use to set up Field Service Work Orders.

> **Note:** To access the processing options, enter IV in the Fast Path field. On the Work with Interactive Versions form, enter P48100 in the Interactive Application field. Select your version from the grid and select Processing Options from the Row menu.

1. Work Order Type

Specify the type of work order that the system returns when you search for valid work orders. Values are:

1: Service

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2: Equipment

2. Only Show User's Work Orders

Specify whether the system should show only the work orders that are assigned to you. Values are:

Blank: Show only work orders that are assigned to you.

1: Show all work orders.

The default value is Blank.

19 Reviewing Cost Information

Understanding Costs

Because JD Edwards EnterpriseOne Capital Asset Management (CAM) is closely integrated with JD Edwards EnterpriseOne General Ledger, you can enter and track the equipment costs, review those costs, and print a variety of equipment cost reports. The system identifies costs that are specific to equipment, based on the fixed asset (FX) range of accounts in the automatic accounting instructions (AAIs). The FX range of accounts includes:

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

Maintenance Expense Accounts

Maintenance expense accounts track costs that are associated with the upkeep of equipment, such as labor and parts.

Operating Expense Accounts

Operating expense accounts track costs that are associated with operating the equipment, such as fuel, licensing, and certification.

Equipment Revenue Accounts

Equipment revenue accounts track the revenue that is generated by a piece of equipment.

Statistical Accounts

Statistical accounts track units, such as hours, miles, gallons, and so on, that are associated with the use of a piece of equipment. Although statistical accounts are within the FX range of accounts, they are not used for maintenance costing.

Although most maintenance costs for equipment enter the system through maintenance work orders, you can enter equipment costs through any JD Edwards EnterpriseOne system that creates journal entries for business transactions in the Account Ledger table (F0911), such as:

- JD Edwards EnterpriseOne General Ledger.
- JD Edwards EnterpriseOne Accounts Payable.
- JD Edwards EnterpriseOne Payroll.

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- JD Edwards EnterpriseOne Inventory Management.

- JD Edwards EnterpriseOne Procurement.

- JD Edwards EnterpriseOne Foundation - Work Order.

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

- Review one subledger or all subledgers for a specific piece of equipment.

- Review detailed or summarized account balance information.

You can view equipment costs either by cost account or by repair code. When you review costs and expenses by cost account, the system displays all accounts in object account order. By reviewing costs by cost account, you get a financial perspective of business costs. For example, you can review:

- Acquisition costs

- Depreciation amounts

- Maintenance expenses

- Operating expenses

When you review costs by repair code, the system displays accounts in subsidiary account order, beginning with the account that you indicate. For example, you might have a cost account for labor. You can set up repair codes to track labor costs for different types of repairs, such as preventive maintenance repairs, emergency repairs, electrical repairs, and mechanical repairs, within the labor cost account.

View costs by repair code to access:

- All repair costs for a particular piece of equipment.

- Subsidiary accounts to review costs that are associated with a certain type of repair.

- Object accounts, such as labor, parts, or materials that are specific to a particular repair code.

You can use processing options to assign default values for the:

- Ledger type

- Detailed or summarized information

- Amounts or statistical units

This diagram illustrates the types of journal entries that affect equipment costs and how those entries are assigned to equipment:

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

You can revise equipment journal entries that have been posted to the general ledger but not yet posted to equipment records. For example, you might want to review journal entries to ensure that all of the necessary equipment information, such as equipment numbers, is included. You can also work with journal entries to prevent certain transactions that are within the FX range of accounts in the AAIs from posting to equipment records. For example, if you have transactions that you record to make corrections to the general ledger, you might want to prevent them from posting to equipment records. In addition, you can print a report that displays transactions that have not been posted to equipment records. When you are satisfied with the integrity of the journal entries, you can post them to equipment records.

> **Note:**
>
> - *"Reviewing Asset and Maintenance Costs" in the   JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide .*
>
> - *"Inquiring on Job Information" in the   JD Edwards EnterpriseOne Applications Job Cost Implementation Guide .*
>
> - *"Reviewing Basic Job Information" in the   JD Edwards EnterpriseOne Applications Job Cost Implementation Guide .*

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Reviewing Shop Costs by Cost Account

This section provides an overview of cost accounts and discusses how to set processing options for the Trial Balance/ Ledger Comparison program (P09210A).

Understanding Cost Accounts

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

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

Forms Used to Review Shop Costs by Cost Account

Form Name	FormID	Navigation	Usage
Trial Balance/Ledger Comparison	W09210AA	Cost Inquiries and Reports (G1312), By Cost Account	Specify the Skip To Account, the Period/ Date for which you want to review account balance information, and the ledger types to compare.
Account Balances	W0902P1A	Select a record on the Trial Balance/Ledger Comparison form, and then select Balance by Month from the Row menu.	Review period and cumulative amounts for a particular account.
Work With Account Ledger	W09200A	Select a record on the Trial Balance/Ledger Comparison form, and then select Account Ledger from the Row menu.	Review account ledger information, such as individual journal entries for a specific account.

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Setting Processing Options for the Trial Balance/Ledger Comparison Program (P09210A)

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

Default

1. Ledger Type 1

Specify the default ledger type 1.

For example, you can use **AA** or **CA** ledger types.

Blank: Use the **BA** ledger type for the default ledger type 1.

2. Ledger Type 2

Specify the default ledger type 2.

For example, you can use **BA** or **CA** ledger types.

Blank: Use the **AA** ledger type for the default ledger type 2.

3. Exit with Ledger Type

Specify the ledger type that the called application should use when exiting to another application. Values are:

Blank: Use ledger type **1.**

1: Use ledger type 1.

2: Use ledger type 2.

Display

1. Suppress Zero Balances

Specify whether to display posting accounts with zero balances. Values are:

Blank: Display posting accounts with zero balances.

N: Display posting accounts with zero balances.

Y: Do not display posting accounts with zero balances.

> **Note:** This processing option applies only to posting accounts. Non-posting header accounts appear on the Trial Balance/Ledger Comparison form (P09210A) regardless of this processing option.

2. Calculation Method

Specify the calculation method to be used when calculating variances. Values are:

Blank: Subtraction

S: Subtraction

A: Addition

M: Multiplication

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D: Division

3. Additional Ledger Type 1

Specify an additional ledger type to be used in calculating account balances for ledger type 1.

For example, you can use **AA** or **CA** ledger types.

Blank: No additional ledger types are used.

4. Additional Ledger Type 2

Specify an additional ledger type to be used in calculating account balances for ledger type 2.

For example, you can use **AA** or **CA** ledger types.

Blank: No additional ledger types are used.

5. Subledger

Specify the subledger that the system uses for calculating account balances.

Enter ***** to display all transactions with subledgers.

Blank: Blank subledger

6. Subledger Type

Specify the subledger type to be used for calculating account balances.

For example, you can use **A** or **C** subledger types.

Blank: Blank subledger type

7. Account Level Of Detail

Specify the account level of detail (from **3** to **9**) to be used.

Blank: 9

Currency

1. Currency Code

Specify the currency code to be used for calculating account balances.

Blank: All currencies.

> **Note:** Use this processing option only if multicurrency is being used.

Select

1. Date Effective Balances

Specify whether to either calculate date-effective balances or to use period-end dates. Values are:

Blank: Use period-end dates.

N: Use period-end dates.

Y: Calculate date-effective balances.

2. Default Thru Period Display

Specify whether to either display thru-periods or thru-dates. Values are:

Blank: Display thru-dates

N: Display thru-dates.

Y: Display thru-periods.

Reviewing Work Order Costs

This section provides an overview of work order costs.

Understanding Work Order Costs

You can review a wide variety of information that is related to work order costs. For example, you might need to review all of the work orders that are over-budget or review all of the current costs that are associated with a project to determine future budgeting requirements.

Work Order Transactions

Use the Work Order Cost program (P48211) to review work order transactions to track specific costs at the individual work order level. Use the Cost by Work Order form to review all posted and unposted general ledger transactions that are associated with a work order. First, ensure that summary document types from user-defined code (UDC) table 48/ DC (Summary Document Types) are set up.

You can use date selections to limit the number of transactions that appear. You also can specify a ledger type to review actual amounts or budget amounts.

Work Order Costs from Equipment Backlog

Use the Work With Work Order program (P48201) to review a summary of estimated and actual costs for a specific group of work orders. This feature is especially useful when you need a quick cost summary for work orders that match a variety of search criteria that you refine as needed. After you refine the search to the specific group of orders, you can review:

- The number of work orders that match the search criteria.

- The estimated and actual hours for the work orders, as well as the variance.

- The average amount of time that is needed to complete each work order.

- The estimated and actual costs for labor, materials, and other costs, as well as the variance.

- A total of the estimated costs, the actual costs, and the variance of the total costs.

Work Order Costs by Category Code

Use the Category Code Analysis program (P13CCA) to review work order costs that are summarized based on work order category codes. This feature is especially useful for reviewing the total number of work orders, based on the category of work order, as well as the costs that are associated with them and the characteristics of the work that is performed. For example, you can set up a work order category code to represent equipment failures, and use each code to represent a different type of failure, such as inadequate lubrication or operator error. You can then review work order costs by category code and see the costs that are associated with operator error. The summary of work order costs includes the number of work orders for each type of failure.

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Work Order Costs by Parent Work Order

Use the Parent Work Order Inquiry program (P48220) to review all of the work order costs that are associated with a parent work order. Use the Work With Cost by Parent Order form to review the total amounts and hours at the parent work order level. Individual work orders can be summarized as:

- Estimated amount or hours.

- Actual amount or hours.

- Variance between estimated and actual.

You review costs by amounts or hours. After you review a summary of costs for the parent work order, you can review detailed costs for each work order in the project.

Estimated and Actual Work Order Amounts

Use the Budget to Actual Variance program (P48218) to review and analyze labor costs for each operation sequence that is charged to a work order. In addition, you can review:

- Total labor amounts or hours charged to a work order.

- Individual parts amounts charged to a work order.

- Total parts amounts charged to a work order.

- Miscellaneous costs charged to a work order, such as an accounts payable voucher for an outside service.

- Actual amounts versus estimated amounts, provided that you have set up inventory document types, which are set up in UDC 48/ID (Inventory Document Types), and unit quantities or currency amounts.

  Note: To review actual amounts for a specific routing, you must enter the operation sequence when you enter time against a work order.

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20 Adding Costs to Work Orders

Understanding Adding Costs to Work Orders

You add costs to a work order whenever you issue parts and materials to a work order. You can use any JD Edwards EnterpriseOne system that creates transactions (journal entries) with a subledger type of W in the Account Ledger table (F0911) to add costs to a work order. Each transaction contains the work order number.

When the maintenance tasks that are associated with a work order require parts, you add the cost of the parts to the work order by issuing parts to the work order. Depending on the parts requirements of the maintenance tasks and how you have applied parts to a work order, you can select from the methods discussed in this section to issue parts to a work order.

Issue Parts Included on Parts Lists

Use this method if you have set up parts lists for the work orders. When you issue parts that are included on the work order parts list, the system reflects a reduction in available inventory for the parts by reducing the commitment for the parts.

Issue Miscellaneous Parts to a Work Order

Use this method to issue miscellaneous parts to a work order when you need to assign a different account number to each part. You can also use this method if you want to add parts costs directly to a piece of equipment without using a work order.

Prerequisites

Before you complete the tasks in this section:

- Set up the 4122 and 4124 Automatic Accounting Instructions (AAIs) in JD Edwards EnterpriseOne Inventory Management.

  See *"Set Up AAIs" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

- Set up branch/plant constants in JD Edwards EnterpriseOne Inventory Management to specify how you want the system to display parts transactions in the general ledger.

  You can specify either part numbers or part descriptions, but not both.

  See *"Defining Branch Plant Constants" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

Issuing Parts Included on the Work Order Parts List

This section provides an overview of issuing parts included on the work order parts list, lists a prerequisite, and discusses how to issue parts.

Understanding Issuing Parts Included on the Work Order Parts List

You issue parts included on the work order parts list when you need to add costs for parts to a work order. This method is especially useful when you want to issue all parts from the parts list to the work order at the same time.

You can also use Work Order Inventory Issues to issue parts that are not included on the work order parts list to a work order. When you issue parts that are not included on the work order parts list, the system updates the parts list to include the additional parts. You can use processing options to restrict the parts that are issued to a work order to only those parts that are included on the parts list.

You can issue nonstock parts to a work order if you have defined them on the work order parts list. When you use Work Order Inventory Issues to issue nonstock parts, the system updates the work order parts list but does not create any accounting transactions.

> **Note:** When you issue parts to a work order for a piece of equipment for which you have defined a warranty, the system provides a soft warning indicating the warranty status.

> **Note:**
>
> - *"Setting Processing Options for the Work Order Inventory Issues Program (P31113)" in the JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* .

Prerequisite

Review the processing options for Work Order Inventory Issues, and verify that you have chosen the option for the Equipment Management selection. JD Edwards EnterpriseOne Capital Asset Management (CAM) shares Work Order Inventory Issues with other JD Edwards EnterpriseOne Manufacturing systems. In addition to the Equipment Management selection, other processing options apply specifically to JD Edwards EnterpriseOne CAM.

See *"Setting Processing Options for the Work Order Inventory Issues Program (P31113)" in the JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* .

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Forms Used to Issue Parts

Form Name	FormID	Navigation	Usage
Work With Work Order Inventory Issue	W31113H	Work Order Processing (G1317), Work Order Inventory Issues	Locate work orders to issue parts.
Inventory Issue Revisions	W31113A	Locate a work order on the Work With Work Order Inventory Issue form, and click Select.	Issue parts.

Issuing Parts

Access the Inventory Issue Revisions form.

This table provides information about various fields for the Inventory Issue Revisions form:

Data Item	Glossary
Issue Material For/UOM	The total quantity requested.
Issue To	A number that identifies an entry in JD Edwards EnterpriseOne Foundation - Address Book, such as employee, applicant, participant, customer, supplier, tenant, or location.
Component Branch	A secondary or lower-level business unit. The system uses the value that you enter to indicate that a branch or plant contains several subordinate departments or jobs. For example, assume that the component branch is named MMCU. The structure of MMCU might be: Branch/Plant - (MMCU) Dept A - (MCU) Dept B - (MCU) Job 123 - (MCU)
Location	The storage location from which goods are moved.
Lot Serial Number	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.
Pick Slip Number	An automatic next number assigned by the system. The pick slip number can be used to track picking information through the system. This number is assigned during the printing of pick slips. The shipment confirmation program enables inquiry and confirmation by this number.

Issuing Miscellaneous Parts to a Work Order

This section provides an overview of issuing miscellaneous parts to a work order, lists prerequisites, and discusses how to set processing options for the Inventory Issues program (P4112).

Understanding Issuing Miscellaneous Parts to a Work Order

Use the Inventory Issues program to issue miscellaneous parts to a work order when you need to assign a different account number to each part. You can also use this method if you want to add parts costs directly to a piece of equipment without using a work order.

> **Note:** If you use the Inventory Issues program to issue parts from inventory that are already included in the parts list for the work order, the system does not relieve the inventory commitment. If you need to relieve the inventory commitment, use Work Order Inventory Issues program.

Prerequisites

Before you complete the tasks in this section:

- Verify that you have purchased and installed these systems.

  You must have installed these systems to access the Inventory Issues program:

  - System 40 - JD Edwards EnterpriseOne Inventory Base and Order Processing.
  - System 41 - JD Edwards EnterpriseOne Inventory Management.

- Set processing options to display equipment-based issues, or equipment- and subledger-based issues to enter an equipment number and a work order number on the Inventory Issues program.

> **Note:**
>
> - *Issuing Parts Included on the Work Order Parts List*.

Forms Used to Issue Miscellaneous Parts to a Work Order

Form Name	FormID	Navigation	Usage
Work With Inventory Issues	W4112D	Work Order Processing (G1317), Inventory Issues	Add an inventory issue.

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Form Name	FormID	Navigation	Usage
Inventory Issues	W4112A	Click Add on the Work With Inventory Issues form.	Enter the branch/ plant, explanation, and optionally, the general ledger date. For each part, enter the item number, quantity, location, lot/serial number, and account number. You also can enter a unit of measure, extended amount, branch/plant, and subledger type.

Setting Processing Options for the Inventory Issues Program (P4112)

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

Defaults

1. Document Type

Specify the document type that the system uses as the default in the Inventory Issues program (P4112) when you enter an issue.

The default document type is typically II (inventory issues). You can enter the document type or select it from the Select User-Define Code form.

Blank: No default value in the Document Type field.

2. Location/Lot

Specify whether the system supplies default values for location and lot fields when you enter an issue. Values are:

Blank: Do not supply default values for the location and lot fields.

1: Supply the primary location and lot as the default.

> **Note:** You can use the primary location as the default only if all secondary locations have a physical location (for example, aisle and bin). If any of the secondary locations has a blank location and lot, you cannot set the primary location as the default.

Versions

1. Journal Entries (P0911)

Specify the version that the system uses when you select the row exit from the Work With Inventory Issues form or, in some cases, the form exit from the Inventory Issues form to the Journal Entries program (P0911).

Blank: ZJDE0001

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> **Note:** If you leave this processing option blank, the Journal Entries program uses version ZJDE0001, which determines how the Journal Entries program displays information. Therefore, for the version to meet the needs, you might need to set this processing option for a specific version.

2. Item Ledger (P4111)

Specify the version that the system uses when you access the Item Ledger Inquiry (CARDEX) program (P4111) from the Row menu on the Work With Inventory Issues form or from the Form menu on the Inventory Issues form.

Blank: ZJDE0001.

3. Warehouse Request (P46100)

Specify the version that the system uses when you access the Manual Replenishments program (P46100) from the Form menu on the Inventory Issues form.

Blank: ZJDE0001.

> **Note:** If you leave this processing option blank, the system uses version ZJDE0001. You might need to set this processing option for a specific version.

Process

1. Issue Type

Specify whether equipment and subledger information appears in the detail area of the Inventory Issues form. Values are:

Blank: Display the standard issue format, without equipment and subledger information fields. The Inventory Issues program disables the Subledger Information exit from the Form menu.

1: Display the Equipment field and hide the Account Number, Subledger, and Subledger Type fields in the detail area. When you select Subledger Information from the Form menu, the Account Information form displays the Equipment field but does not display fields for account number and subledger information.

2: Display the Account Number, Subledger, and Subledger Type fields and hide the Equipment field in the detail area. When you select Subledger Information from the Form menu, the Account Information form displays the fields for account number and subledger information, but does not display the Equipment field.

3: Display the Equipment, Account Number, Subledger, and Subledger Type fields in the detail area.

When you select Subledger Information from the Form menu, the Account Information form displays fields for equipment, account number, and subledger information.

> **Note:** If you enter **2** or **3** for this processing option, you can set the Inventory Issues program's (P4112) Account Number processing option, which is located on the Process 1 tab, to require entry in the Account Number field.

2. Account Number

Specify whether the system requires entry of account numbers (for example, business unit.object.subsidiary) in the detail area of the Inventory Issues form. Values are:

Blank: Enable transactions that use the expense account from the inventory default AAI item 4124.

1: Require an entry in the Account Number field in the detail area. This field is available only when you enter **2** or **3** in Inventory Issues program (P4112), Process 1 tab, Issue Type processing option.

3. Cost Entry

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Specify whether the Unit Cost and Extended Amount fields appear or are disabled on the Inventory Issues form. Values are:

Blank: Display the fields.

1: Display the fields with default values from the Item Cost table (F4105), but do not enable them to be updated.

2: Do not display the fields.

4. Journal Entries

Specify whether the Inventory Issues program (P4112) creates detailed or summarized journal entries in the general ledger.

If the Inventory Issues program creates detailed journal entries, the system creates one journal entry (debit and credit) for each detail line in an issue, using a batch type of N.

> **Note:** This processing option affects journal entries in the Account Ledger table (F0911) only.

The AAIs that are most commonly used are 4122 (Inventory) and 4124 (Expense or COGS). If you use standard costs, the system might create journal entries for the variance based on AAI item 4141 (Inventory or Expense COGS). The Item Ledger File table (F4111) contains information for each detail line in each issue regardless of the value of this processing option.

If the Inventory Issues program creates summarized journal entries by account number, the system creates a summarized debit total and a summarized credit total per account number for all lines in an issue. Values are:

Blank: Create one journal entry for each detail line in an issue.

1: Create journal entries that are summarized by account number.

5. Issue Quantity

Specify whether to enable an issue quantity that is greater than the available quantity, which could result in a negative on-hand quantity. Values are:

Blank: Do not enable an issue quantity that results in a negative on-hand quantity.

1: Enable an issue quantity that results in a negative on-hand quantity.

> **Note:** Enabling a negative on-hand quantity is not compatible when using weighted average costs.

6. Lots on Hold

Specify whether the system enables issues to lots that are on hold. If the Lot Status Code field on the Item/Branch Plant Information form is blank, the lot is not on hold. Values are:

Blank: Do not enable issues to lots that are on hold.

1: Enable issues to lots that are on hold.

7. Item Sales History

Specify whether to update the Item History table (F4115) if you use the JD Edwards EnterpriseOne Inventory Management system but do not use the JD Edwards EnterpriseOne Sales Order Management system.

For example, a company that operates a consignment warehouse might use only the Inventory Issues program to reduce inventory. However, the company might want to review historical information about issues by reviewing buyer's information, which you can access from the Inventory Inquiries menu (G41112).

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If you use the JD Edwards EnterpriseOne Sales Order Management system, the system can update the Item History table as a result of sales transactions that are part of the sales updating process. Values are:

Blank: Do not update the fields.

1: Update the Item Number, Branch, Fiscal Year, and Period fields in the Item History table with information from an issue transaction.

Interop

1. Transaction Type

Enter a value from user-defined code (UDC) table 00/TT (Transaction Type) that the system uses when creating outbound interoperability transactions.

Blank: No outbound interoperability processing is performed.

Agreement

1. Agreement Assignment (FUTURE)

Specify how the system searches for agreements.

This processing option applies only if you use the JD Edwards EnterpriseOne Inventory Management system with the JD Edwards EnterpriseOne Agreement Management system. Values are:

Blank: Do not search for agreements.

1: Display one agreement. If the system finds multiple agreements, the system displays a check mark in the row header that is located in the detail area and in the Agreement Exists column, and you must select an agreement.

2: Display all agreements.

3: Display the agreement that has the earliest expiration date.

Reviewing Inventory Issues

This section discusses how to review inventory issues.

Understanding Reviewing Inventory Issues

You can review inventory issues for errors before posting them to the general ledger. You can review a variety of detailed information about inventory issue batches, such as individual journal entries for an inventory issue.

Forms Used to Review Inventory Issues

Form Name	FormID	Navigation	Usage
Work With Batches	W0011A	Work Order Processing (G1317), G/L Journal Review	Locate the appropriate batch.

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Form Name	FormID	Navigation	Usage
General Journal Review	W0911BA	Locate and select the appropriate batch on the Work With Batches form.	Review the issue information.

Posting Inventory Issues to the General Ledger

When you issue parts to a work order, the system creates unposted general ledger transaction records in the Account Ledger table (F0911). Each transaction contains the work order number and the equipment number. You must post these transactions to the general ledger. You can use the Post Inventory to General Ledger program to post transactions to the general ledger. When you post transactions to the general ledger, the system updates the Account Balances table (F0902).

After you post inventory transactions to the general ledger, you must post them to equipment to update the Asset Account Balances table (F1202). Processing options in the general ledger post program enable you to post transactions to equipment at the same time that you post to the general ledger.

Select Work Order Processing (G1317), Post Inventory to the General Ledger.

> **Note:**
>
> - *"Setting Processing Options for General Ledger Post (R09801)" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide .*

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21 Working with Time Entry

Understanding Time Entry

For JD Edwards EnterpriseOne CAM, the time entry program uses employee-based labor rates. Employee-based time entry captures costs that are more accurate by using the employee's labor rate when costing labor. If you currently use JD Edwards EnterpriseOne Plant and Equipment Management and are upgrading to JD Edwards EnterpriseOne CAM, you are probably using employee-based labor rates.

To enter time using employee-based labor rates, you use programs from JD Edwards EnterpriseOne Payroll. For employees who work on equipment, you can track time information during this method of time entry.

JD Edwards EnterpriseOne CAM includes access to all setup, entry, and batch programs that are needed to run a complete time-entry cycle for entries against work orders.

> **Note:** Because these procedures are derived from JD Edwards EnterpriseOne Payroll, not all steps in this topic apply to JD Edwards EnterpriseOne CAM.

Prerequisites

Before you complete the tasks in this section:

- Set up payroll automatic accounting instructions (AAIs) to create the journal entries for labor expense and offset accounts.
- Set up master business function (MBF) processing options.

Entering Employee Time Information

This section discusses how to:

- Enter employee time.
- Set up the Time Entry MBF Processing Options program (P050002A).

Forms Used to Enter Employee Time

Form Name	FormID	Navigation	Usage
Search for Equipment Work Orders	W13700B	Work Order (G1316), Planning Workbench	Locate work orders.

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Form Name	FormID	Navigation	Usage
Work with Time Entry by Individual	W051121A	Select Order Processing from the Row menu on the Search for Equipment Work Orders form, and then select Payroll Time Entry.	Locate time entry records.
Speed Time Entry Revisions	W051121C	Click Add on the Work with Time Entry by Individual form.	Enter employee time.

Entering Employee Time

Access the Speed Time Entry Revisions form.

Interim ID
Specify a code that identifies a group of employees for whom you are processing payroll.

Use this ID to process each step of the payroll cycle. This code is also used to identify the interim ID that you select when you enter interim payments.

Batch
Specify a number that identifies a group of transactions that the system processes and balances as a unit.

When you enter a batch, you can either assign a batch number or let the system assign it using the Next Numbers program.

You do not need to enter a batch number if you have set automatic batch numbering in the processing options (P050002A).

Equipment Worked
Specify an identification code that represents an asset.

You enter the identification code in one of these formats:

    a. Asset number (a computer-assigned, eight-digit, numeric control number).
    b. Unit number (a 12-character alphanumeric field).
    c. Serial number (a 25-character alphanumeric field).

Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character that you enter indicates whether you are entering the primary (default) format that is defined for the system, or one of the other two formats.

A special character (such as **/** or *****) in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats in the fixed assets constants.

Equipment Worked is not required if you are using speed coding.

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Note:

- *"Setting Up AAIs for Labor, Billings, and Equipment Distribution" in the JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide* .

- *"Setting Up AAIs for Labor Billings" in the JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide* .

- *"Setting Up Journal Summarization Rules" in the JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide* .

- *"Setting Processing Options for the Speed Time Entry Program (P051121)" in the JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide* .

- *"Approving Batches" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .

Setting Up the Time Entry MBF Processing Options Program (P050002A)

JD Edwards EnterpriseOne Human Capital Management has one master business function, Time Entry MBF Processing Options (P050002A), which interacts with all time entry programs. You need to set up processing options for this master business function to define default values, values, and functions for time entry programs.

Considerations

Keep in mind these considerations when you set up MBF Time Entry processing options:

- JD Edwards EnterpriseOne CAM uses only the payroll program Speed Time Entry (P051121).
- In Interactive Versions (IV) for Time Entry MBF Processing Options (P050002A), these processing options affect JD Edwards EnterpriseOne CAM:
  - On the Pay Rates tab, the Pay Rate option defines where the system finds the employee rate.
  - On the Equipment tab, the Equipment Worked On option enables the program to enter the equipment number as the default value for the Equipment Worked On field.
  - On the Batches tab, the Batch Number option enables you to assign batch numbers automatically.

Note:

- *"Setting Processing Options for the Time Entry MBF Processing Options Program (P050002A)" in the JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide* .

Processing Journal Entries

You process journal entries to update the general ledger with labor, payroll burden, and equipment expenses. The way in which you process journal entries depends on whether you use Payroll.

Note: If you are using the Generate Timecard Entries program (R052901), verify the setting of the Intercompany Settlements processing option on the Process tab. When generating timecards, the program uses the accrual account of the employee's company. If this account is different from the target account of the work order, you must set this processing option value to **1**.

Note:

- *"Processing Journal Entries" in the   JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide   .*

22 Working with Maintenance Forecasts

Understanding Maintenance Planning

Use maintenance planning to accurately forecast the parts and labor resources that are needed to complete the maintenance tasks. Use maintenance planning to minimize equipment downtime by ensuring that the necessary parts, materials, and maintenance personnel are available when a piece of equipment requires maintenance.

When you use maintenance planning, you define a range of maintenance work orders for which the system projects parts requirements and labor requirements. You can integrate this information with forecasted (planned) work orders that the system generates when you run a preventive maintenance projection.

After the system generates a preventive maintenance projection, you can:

- Review information from the preventive maintenance projection.
- Generate a parts plan.
- Respond to system recommendations for purchasing parts and materials.
- Generate a labor plan.
- Revise a labor plan to accommodate available resources.
- Review the maintenance plan within the resource assignments crew scheduling processes.

To use Maintenance Planning, you must have purchased and installed these systems:

- JD Edwards EnterpriseOne Product Data Management.
- JD Edwards EnterpriseOne Shop Floor Management.
- JD Edwards EnterpriseOne Resource & Capacity Planning.
- JD Edwards EnterpriseOne Material Planning.
- JD Edwards EnterpriseOne Inventory Base and Order Processing.
- JD Edwards EnterpriseOne Inventory Management.
- JD Edwards EnterpriseOne Procurement.

Check with the system administrator to verify which systems you have purchased and installed.

You should be familiar with these terms and concepts:

- PM projections
- Parts plans
- Labor plans

Updating PM Projections

This section provides an overview of the Update PM Projections program, lists a prerequisite, and discusses how to:

- Set up processing options for the Update PM Projections program (R13411).
- Run the Update PM Projections program (R13411).

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Understanding the Update PM Projections Program

Run the Update PM Projections program to forecast parts and labor requirements for future PMs. When you run this program, you specify the dates for which you want the projection to apply.

The system uses information from the Asset Master File (F1201) and the Maintenance Schedule File (F1207), specifically the estimated occurrences value and the last completed date for each service type, to determine when a piece of equipment is due for maintenance. The system uses parts and labor resource information from the model work order to determine future parts and labor requirements. The system also uses information from the Maintenance Rules File (F1393) to determine if a crew schedule should be created, and determines the work order coding information when the work order is created by the PM Update Status program (R12807).

When you set processing options for the Update PM Projections program (R13411), use forecast types (34/DF) to distinguish projections. For example, you can specify forecast types to distinguish manufacturing and maintenance projections. Within maintenance, you could specify forecast types to set up multiple projections based on:

- Short-term planning.
- Long-term planning.
- Area, such as production line 1, line 2, and so on.
- Planner.

This table describes the tables that the system updates when you run the Update PM Projections program:

Table	Description
Update PM Projections (F13411)	This table provides information for Work With PM Projections and Print PM Projection programs.
Forecast File (F3460)	The system uses values from this table to calculate parts and labor requirements for projected preventive maintenance.

Note: You must have purchased and installed the JD Edwards EnterpriseOne Material Planning system and the JD Edwards EnterpriseOne Resource & Capacity Planning system to use parts and labor planning functions. In addition, you must associate model work orders with PM schedules to supply the system with the necessary data to determine parts and labor requirements.

Prerequisite

Create model work orders for PM schedules.

See *Creating Model Work Orders*.

Setting Processing Options for the Update PM Projections Program (R13411)

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

Defaults

1. Schedule Pattern

Specify the schedule pattern that the system uses to retrieve schedule period information from the Maintenance Schedule Period (F48302) table.

This information is used when creating PM projection information. This processing option works in conjunction with the Starting Period and Number of Periods to Project processing options.

> **Note:** This processing option is intended for use with the Maintenance Scheduling product. Entering a value in this processing option results in the system overriding the values entered in the From Date and Through Date processing options. If you leave this processing option blank, the system uses the values entered in the From Date and Through Date processing options when creating the PM projection information.

2. Starting Period

Specify the starting period.

The system uses this period start date as the PM projection from date. The start date for the period specified overrides the From Date processing option. Values are:

1: Current period (default)

2: Next period

3: Following period

> **Note:** This processing option works in conjunction with the Schedule Pattern and Number of Periods to Project processing options. Schedule periods must exist in the Maintenance Schedule Periods (F48302) table for the schedule pattern specified in the processing option

3. Number of Periods to Project

Specify how many periods, including the period specified in the Starting Period processing option, that the system considers in determining the ending period.

The system uses this period end date as the PM projection through date. The end date for the determined period overrides the Through Date processing option.

Blank: 1 Period.

> **Note:** This processing option works in conjunction with the Schedule Pattern and Starting Period processing options. Schedule periods must exist in the Maintenance Schedule Periods (F48302) table for the schedule pattern specified in the processing option.

4. From Date

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Specify the from date that the system uses to project PMs.

Blank: System date.

5. Through Date
Specify the through date that the system uses to project PMs.

Blank: System date.

6. Forecast Type
Enter a value from user-defined code (UDC) table 34/DF (Forecast Type) that specifies the forecast type to be used when creating PM projections.

7. Job Status Message Recipient
Specify the address book number of the recipient of job status messages that result from the Update PM Projections program (R13411).

Blank: The system uses address book number of the current user.

Running the Update PM Projections Program (R13411)

Select Maintenance Planning (G1322), Update PM Projections.

Revising PM Information

This section provides an overview of PM information and discusses how to revise PM projections.

Understanding PM Information

You can review detailed information about future preventive maintenance. For example, you can review:

- Projected dates for preventive maintenance.
- Projected service types for specific pieces of equipment.
- Estimated hours and amounts for labor and materials for each service type.
- A summarized total of estimated hours and amounts for all service types that match the search criteria that you enter.

You can use any of these types of information to limit the PM information that appears:

- Forecast type
- Schedule dates
- Service types
- Equipment location
- Equipment number
- Equipment category codes

When you run the PM projection, you can use the information that the system generates to help plan the maintenance activities. You specify the time period for which you want the system to forecast when equipment requires maintenance. The PM projection includes this information:

- All equipment that requires maintenance.

- Dates when the equipment requires maintenance.

- Parts and materials that are required for the maintenance.

- Estimated amount of time that is required to perform the maintenance.

- Work Order coding based on the Maintenance Rules File (F1393).

The Update PM Projections program uses information from the equipment masters and the preventive maintenance schedules for the equipment to update these tables:

Table	Description
PM Projections (F13411)	This table stores this information: • Equipment numbers. • Service types that are associated with the equipment. • Projected start dates for each service type. • Estimated hours for each service type. • Estimated parts and labor costs. • Forecast type.
Forecast File (F3460)	This table stores this information: • Standard parts list and routing instructions from the model work order that is associated with a PM. • Branch where parts are stocked. • Requested date for maintenance. • Forecast type. • Document type.

Forms Used to Revise PM Projections

Form Name	FormID	Navigation	Usage
Work With PM Projections	W13011A	Maintenance Planning (G1322), PM Projections	Locate information about projected PM.
Work With Forecasts	W3460B	MPS Daily Operations (G3412), Enter/Change Detail Forecast.	Locate forecast information.

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Form Name	FormID	Navigation	Usage
Detail Forecast Revisions	W3460A	Select or add a record on the Work With Forecasts form.	Revise PM projections. Add or delete a parts forecast. Enter descriptive text for the forecast. When you revise forecast information, the changes affect only the Forecast File table (F3460); they do not affect the PM Projections table (F13411).

Revising PM Projections

Access the Work With PM Projections form.

Forecast Type
Enter a value in UDC 34/DF (Forecast Type) that indicates one of these:

- o The forecasting method used to calculate the numbers that appear for the item.

- o The actual historical information for the item.

Generating a Parts Plan

This section provides an overview of parts plans, lists a prerequisite, and discusses how to:

- Generate a parts plan.
- Set up processing options for the Message Summary program (P3401).
- Review parts by planning family.

Understanding Parts Plans

Use the parts plan to review the availability of required parts. When you generate a parts plan, the system generates messages that you should review to identify various parts planning needs. For example, you review parts messages to determine the quantity needed of a particular part at a future date. You can also direct the system to create purchase orders for parts that are currently not on hand but needed for the future.

You can generate a parts plan to assist you in planning parts and materials requirements for work orders. When you generate a parts plan, the system compares the parts inventory that you have on hand with the parts that are needed for work orders. The system determines parts requirements for actual work orders, such as work orders that are generated for corrective maintenance and forecasted (planned) work orders.

Based on this comparison, the system determines the availability of the parts that are needed for work orders. The system also generates messages that you can review to ensure that the right parts are available when they are needed. The messages include these recommendations:

- Which parts and materials you should order.

- When you should place orders for parts.

- What quantity you should order.

- Whether you should cancel, defer, expedite, or increase existing orders.

You use processing options to define a planning horizon for the parts plan. A planning horizon refers to the period for which a plan applies and how the period is ordered for display purposes. You can include up to 52 periods in a planning horizon. For example, you can generate a parts plan with a six-month planning horizon ordered as:

- Days: 14

- Weeks: 7

- Months: 4

When you review parts availability by time, the system uses the planning horizon as the basis for the parts projection information that appears.

When you use processing options for generating a parts plan:

- JD Edwards EnterpriseOne Plant and Equipment Management users set the Generation Mode field to **2** (gross regeneration).

- JD Edwards EnterpriseOne Plant and Equipment Maintenance users set the Generation Type field to **4** (MRP with or without MPS).

- JD Edwards EnterpriseOne Plant and Equipment Maintenance users select the default value, **QT,** in the UCD Type field. This UDC table contains all quantity types.

Every time that you generate a parts plan, the system deletes all of the previous messages regarding parts availability. The system also deletes all of the detail messages for the parts that you specify, except messages that you enter manually and messages that you direct the system to hold.

> **Note:** For the system to include an inventory part when the system calculates part availability, the inventory part must have an item balance record.

To ensure accurate information when you generate a parts plan, other system users should not access programs that use inventory or planning tables. When you run the Plan Generation program, the processing options appear before submitting the job for processing.

When the system generates a parts plan, it updates several forms and generates a variety of messages. You can review these forms and messages to plan the parts requirements for the maintenance tasks. The forms and messages include these types of information:

Form	Types of Information
Planning family	You can view messages by planning family or individuals within a planning family. You use planning families to group individuals who are responsible for parts. For example, you can review messages pertaining to: • Parts for which the maintenance planning family is responsible. • Parts for which only the buyer is responsible.

Form	Types of Information
Inventory parts details	You can review parts detail messages when you want to review detailed ordering information about a particular part. The messages include recommendations about when you should order the part. In addition, you can review: • Inventory locations where the part is needed. • Required dates. • Part suppliers. After you review the messages, you can take appropriate action on the messages.
Inventory parts availability by time	You can review the activity affecting the availability of an inventory part over a time period that you specify. You can review the activity in daily, weekly, or monthly increments. Activity that affects availability includes: • Beginning available amounts. • Supplies that are created by purchase orders. • Demands that are created by maintenance work orders.
Supply and demand	You can review detailed supply and demand information for a particular part. For example, you can review detailed information about a work order that creates a demand for a part or a purchase order that creates a supply for a part.
Component parts	You can review component part information when you want to review all of the standard parts lists (or bills of material) for which a component part is used.
Parts cross-reference	You can review parts cross-reference information when you want to determine which parts can be used as substitutions or replacements for parts that are not available. You can also review substitute suppliers.

Prerequisite

Verify that the workday calendar has been set up for the time period for which you want to generate the parts plan. If the parts planning requires order lead time, you must account for backward and forward scheduling to accommodate the lead time.

Form Used to Review a Parts Plan

Form Name	FormID	Navigation	Usage
Work with Message Summary	W3401D	Material Planning (G1323), Review Planning Family	Parts by planning family. When you select the person or planning family for which you want to review parts

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Form Name	FormID	Navigation	Usage
			information, all parts associated with the person or planning family that have outstanding messages appear. You can specify the type of messages that you want to appear.

Generating a Parts Plan

Select Material Planning (G1323), Plan Generation.

Setting Processing Options for the Message Summary Program (P3401)

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

Versions 1

1. Manufacturing Work Bench Version

Specify a valid version for the Manufacturing Workbench (Version 001).

2. Message Detail Version

Specify a valid version for the Message Detail (Version 002).

3. Item Availability Version

Specify a valid version for the Item Availability (Version 003).

4. Time Series Version

Specify a valid version for the Time Series (Version 4).

5. Forecast Maintenance Version

Specify a valid version for the Forecast Maintenance (Version 005).

6. Supplier Schedule Version

Specify a valid version for the Supplier Schedule (Version 006).

Versions 2

1. Supplier Master Version

Specify a valid version for the Supplier Master (Version 007).

2. Item Branch (P41026)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

> **Note:** Versions that begin with *XJDE* or *ZJDE* are set up in the JD Edwards EnterpriseOne software and should not be changed.

Defaults

1. Planning Code

A code that indicates how Master Production Schedule (MPS), Material Requirements Planning (MRP), or Distribution Requirements Planning (DRP) processes this item. Valid codes are:

0: Not Planned by MPS, MRP, or DRP.

1: Planned by MPS or DRP.

2: Planned by MRP.

3: Planned by MRP with additional independent forecast.

4: Planned by MPS, Parent in Planning Bill.

5: Planned by MPS, Component in Planning Bill.

Enter the MPS type or **for all.**

These codes are hard coded.

Taxes

1. Tax Area flag

Specify an option that indicates the type of processing for an event.

Blank: Tax area from the supplier address number.

1: Use the tax area from the ship to address.

Reviewing Parts by Planning Family

Access the Work with Message Summary form.

Planning Family

Enter a value from UDC 41/P4 (Master Planning Family) that represents an item property type or classification, such as commodity type or planning family.

The system uses this code to sort and process like items.

This field is one of six classification categories available primarily for purchasing purposes.

Message Type

Enter a code that distinguishes different messages generated in the Distribution Requirements Planning/Master Production Schedule/Material Requirements Planning system. Valid codes are:

A: Warning messages (user controlled).

B: Order and expedite.

C: Cancel.

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D: Defer.

E: Expedite.

F: Frozen order (user controlled).

G: Increase order quantity to (user controlled).

H: Decrease rate quantity to.

I: Increase rate quantity to.

L: Decrease order quantity to (user controlled).

M: Manual reminder.

N: Create rate.

O: Order.

P: Firm order

S: FPO adjustment suggestion.

T: Past due order.

Working with Parts Detail Messages

This section consists of an overview of parts detail messages and discusses how to set processing options for the MRP/MPS Detail Message Revisions program (P3411).

Understanding Parts Detail Messages

When you generate a parts plan, the system produces messages that identify when planning conflicts exist. For example, depending on how you set up the system, if a part's usage exceeds availability, the system produces an order message. You can process the messages according to the system's recommendations, delete them, or clear them. You can also create personalized messages to serve as reminders about particular parts.

The types of messages that the system produces are determined by UDC 34/MT (Message Type). You can add or change any message that appears on the Item Detail Messages form. You can also direct the system to perform actions on messages that you add or change. Standard message types include warning messages and planned purchase order messages. Other messages include:

- Expedite an order

- Defer an order

- Increase an order

- Decrease an order

This table describes the actions you can do after you review a message:

Command	Description
Process the message	Use this command to resolve the planning conflict. When you direct the system to process an order message, it carries out actions to resolve the planning conflict. For example, when you direct the system to process a planned purchase order message, it automatically creates a purchase requisition.
Delete the message	Use this command to delete obsolete messages.
Clear the message	Use this command to prevent the message from appearing. You can retrieve a cleared message by choosing Processed Messages from the View menu.

After you review parts planning messages, you can also create purchase requests or purchase orders for parts for which you have an immediate need. You can do so without accessing additional menus or programs.

Forms Used to Revise Parts Detail Messages

Form Name	FormID	Navigation	Usage
Work With Detail Messages	W3411D	Material Planning (G1323), Item Detail Messages	Locate and review detail messages.
Suppliers Selected for Order	W43032A	Select a record from the grid and select Process Message(s) from the Row menu on the Work With Detail Messages form, and then click Close. The system changes the message type. The message type that is associated with the part must be a message type for which the system can create a purchase request or order. For example, if the message that appears for a part is a manual reminder message, the system does not create a purchase request or order.	Create a purchase request or order for a part.
Generated Purchase Orders	W43032C	Select Generate Order(s) from the Form menu on the Suppliers Selected for Order form.	Review the purchase request or purchase order number.

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Setting Processing Options for the MRP/MPS Detail Message Revisions Program (P3411)

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

PO Info

1. Line Type

Specify how the system processes lines on a transaction.

The line type affects the systems with which the transaction interfaces (JD Edwards EnterpriseOne General Ledger, JD Edwards EnterpriseOne Job Cost, JD Edwards EnterpriseOne Accounts Payable, JD Edwards EnterpriseOne Accounts Receivable, and JD Edwards EnterpriseOne Inventory Management). The line type also specifies the conditions for including a line on reports and in calculations. Some examples of values, which have been defined on the Line Type Constants Revisions form (P40205), are:

S: Stock item.

J: Job cost, subcontracts, or purchasing to the general ledger.

B: General ledger account and item number.

N: Nonstock item.

F: Freight.

T: Text information.

M: Miscellaneous charges and credits.

W: Work order.

2. Beginning Status

Enter a value from UDC 40/AT (Activity/Status Code) that specifies the beginning status, which is the first step in the order process.

You must specify a value that has been set up on the Order Activity Rules form for the order type and the line type that you are using.

3. Consolidate

Specify that you want to consolidate all processed messages that apply to one supplier on one purchase order. Values are:

Blank: Do not consolidate messages.

1: Consolidate messages.

4. Price Control

Specify whether the system retrieves the price from a blanket order or the JD Edwards EnterpriseOne Procurement Price Management system. Values are:

Blank: The system retrieves the price from the blanket order.

1: The system retrieves the price from the JD Edwards EnterpriseOne Procurement Price Management system.

WO Info

1. Beginning Status

Enter a value from UDC 00/SS (Work Order Status) that identifies the default status of the work order to use when a work order is created.

2. Cancelled Orders Status

Enter a value from UDC 00/SS (Work Order Status) that identifies a canceled work order.

OT Info

1. Consolidate

Specify whether you want to consolidate all processed messages that apply to one branch/plant on one transfer order. Values are:

Blank: Do not consolidate messages.

1: Consolidate messages.

Blanket Info

1. Blanket Order Document Type to Release

Specify whether you want the program to perform an interactive release against a matching blanket order when processing messages to create purchase orders.

Enter a document type to release against.

Blank: The program does not release against a blanket order.

Versions

1. Blanket Order Release (P43216)

Specify a version of the Blanket Order Release program.

The system calls this version when you access the Blanket Order Release form from this program.

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

2. Time Series (P3413)

Specify a version of the Time Series program.

The system calls this version when you access the Work with Time Series form from the Form menu of the Work with Detail Messages or Detail Message Revisions forms.

3. Pegging Inquiry (P3412)

Specify a version of the Pegging Inquiry program.

The system calls this version when you access the Work with Pegging Inquiry form from the Form menu of the Work with Detail Messages or Detail Message Revisions forms.

4. Supply/Demand Inquiry (P4021)

Specify a version of the Supply and Demand Inquiry program.

The system calls this version when you access the Work with Supply and Demand form from the Form menu of the Work with Detail Messages or Detail Message Revisions forms.

5. Purchase Order Entry (P4310)

Specify a version of the Purchase Orders program.

The system calls this version when you access the Work with Order Details form from the Row menu of the Work with Detail Messages or Detail Message Revisions forms.

6. Work Order Entry (P48013)

Specify a version of the Work Order Processing program.

The system calls this version when you access the Work Order Processing form from this program.

> **Note:** This program is designed for use with manufacturing work orders, and not service or maintenance work orders.

7. Rate Schedule Revisions (P3109)

Specify a version of the Enter/Change Rate Schedule program.

The system calls this version when you access the Work with Rate Schedules form from the Form menu of the Work with Detail Messages or Detail Message Revisions forms.

8. Transfer Order Entry (P4210)

Specify a version of the Sales Order Entry program.

The system calls this version when you access the Sales Order Entry form from this program.

9. Scheduling Workbench (P31225)

Specify a version of the Manufacturing Scheduling Workbench program.

The system calls this version when you access the Work with Work Order Scheduling form from the Form menu of the Work with Detail Messages or Detail Message Revisions forms.

10. Bill of Material Inquiry (P30200)

Specify a version of the Bill of Material Inquiry program.

The system calls this version when you access the Bill of Material Inquiry form from the Row menu of the Work with Detail Messages or Detail Message Revisions forms.

11. Item Branch (P41026)

Specify a version of the Item Branch program.

The system calls this version when you access the Plant Manufacturing Data form from the Row menu of the Work with Detail Messages or Detail Message Revisions forms.

Display

1. Viewing Messages For

Specify whether to view messages for demand branch/plant or supply branch/plant. Values are:

Blank: View messages for demand branch/plant.

D: View messages for demand branch/plant.

1: View messages for supply branch/plant.

S: View messages for supply branch/plant.

Reviewing Parts Supply and Demand

This section provides an overview of reviewing parts supply and demand.

You can review the individual supply and demand for a particular maintenance part by date. You can also review the documents that affect the supply and demand for a part, and then take appropriate action.

You determine which type of documents that the system includes when it calculates supply and demand for a part by setting up supply and demand inclusion rules.

Forms Used to Review Parts Supply and Demand

Form Name	FormID	Navigation	Usage
Work With Supply and Demand	W4021B	Material Planning (G1323), Supply and Demand Inquiry	Locate supply and demand records.
Parts Availability - Multi Level Indented	W30200C	Select the record and select BOM Availability from the Form menu.	Review the availability of component parts of an item, such as BOM Inquiry, Parts Availability, or Leadtime Inquiry.
Work With Manufacturing Work Orders	W48013J	Select Work Order Inquiry from the Row menu on the Work With Supply and Demand form.	Review information about the work order that is creating a demand for a part. **Note:** This program is designed for use with manufacturing work orders, and not service or maintenance work orders.

Reviewing Parent Information for Component Parts

This section provides an overview of parent information for component parts and discusses how to set processing options for the Bill of Material Where Used program (P430201).

Understanding Parent Information for Component Parts

You can review information for all parent assemblies or kits for which a maintenance part is a component. This feature is particularly useful if you need to locate an alternative source for a component part.

When you review parent information for component parts, the system displays each bill of material that includes the component part. The current parent information for a component part appears, but you can request that the system display historical or future parent information. You can also review:

- Effective dates of each bill of material.

- Inventory master information for each parent part.

Forms Used to Review Parent Information for Component Parts

Form Name	FormID	Navigation	Usage
Work With Bill of Material Where Used	W30201B	Material Planning (G1323), Where Used Inquiry	Locate BOM where-used records. Review where-used information for components
Work With Item Master Browse	W4101E	Select the record for the parent part on the Work With Bill of Material Where Used form, and then select Item Master from the Row menu.	Review additional information from the standard parts list. Use the form menus to review equipment, work orders that use the component part, pieces of equipment that use a particular parent bill of material for a component, or work orders that use a particular parent bill of material for a component.

Setting Processing Options for the Bill of Material Where Used Program (P30201)

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

Defaults

1. Enter the Screen Default type:

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Specify the processing mode used in Purchase Order Consolidator to signify when specific orders are being processed. Values are:

1: Single level

2: Multi level

3: Multi-level indented

2. Enter the default Bill Type to be used.

Enter a value from UDC 40/TB (Bill Type) that designates the type of bill of material.

You can define different types of bills of material for different uses. For example:

Blank: M

M: Standard manufacturing bill

RWK: Rework bill

SPR: Spare parts bill

The system enters bill type **M** in the work order header when you create a work order, unless you specify another bill type. The system reads the bill type code on the work order header to know which bill of material to use to create the work order parts list. MRP uses the bill type code to identify the bill of material to use when it attaches MRP messages. Batch bills of material must be type **M** for shop floor management, product costing, and MRP processing.

Versions

Item Search (P41200)

Specify a user-defined set of specifications that control how applications and reports run.

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

Blank: ZJDE0001.

Material Where Used Print (R30420)

Specify a brief information (a remark or an explanation) about an item.

Item Master (P4101B)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

> **Note:** Do not modify the JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes.

Where Used Inquiry (P13226)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

Manufacturing Work Order Processing (P48013)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

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> **Note:** This program is designed for use with manufacturing work orders, and not service or maintenance work orders.

Bill of Material Inquiry (P30200)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

Revising Parts Cross-References

This section provides an overview of parts cross-references and discusses how to set processing options for the Item Cross Reference program (P4104).

Understanding Parts Cross-References

You can use parts cross-references to track the maintenance parts in a variety of ways. When you set up parts cross-references, you assign cross-reference types to each part. For example, you can assign cross-reference types for:

- Replacements for discontinued parts
- Substitute parts
- Alternate suppliers
- Alternate parts numbers

You can change cross-reference information as new information becomes available. This feature is particularly useful when you need to access the most current information about a part. You can add or revise this cross-reference information for a part:

- Cross-reference type code
- Address number
- Cross-reference part number
- Cross-reference description

Forms Used to Revise Cross-References for Parts

Form Name	FormID	Navigation	Usage
Work With Item Cross Reference	W4104A	Material Planning (G1323), Item Cross Reference	Locate cross-reference information.
Item Cross Reference Revisions By Item	W4104C	Select the record for the item that you want to revise and then select Cross Rf by Item (cross-reference by item) from the Row menu.	Revise parts cross-references.

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Setting Processing Options for the Item Cross Reference Program (P4104)

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

Processing

1. Revise by Item or Address

Specify an option that specifies the type of processing for an event.

Blank: Use the revisions form by address.

1: Use the revisions form by item.

> **Note:** This option does *not* affect the display of the browse form.

Working with Labor Plans

This section provides overviews of labor plans and labor plan generation, lists a prerequisite, and discusses how to:

- Generate the labor plan.
- Set processing options for the Capacity Message Summary program (P3301).
- Review labor messages by dispatch group.
- Set processing options for the Capacity Planning Message Revisions program (P3311).
- Review messages by work center.

Understanding Labor Plans

Use the labor plan to review the demands that maintenance tasks place on the labor resources. When you generate a labor plan, the system generates messages that alert you to over-capacity or under-capacity conditions. You can adjust the labor resources accordingly, or reschedule selected maintenance tasks to alleviate the over-capacity or under-capacity conditions.

When the system generates a labor plan, it updates several forms and generates a variety of messages. You can review these forms and messages to plan the resource units that are needed to complete the maintenance tasks. The forms and messages include this information:

Form	Description
Labor messages	You can quickly identify over-capacity and under-capacity conditions by reviewing labor messages. You can review messages for an individual work center or for a dispatch group. A dispatch group consists of related work centers that report to one business unit. Dispatch groups enable you to organize work centers according to common functions, similar operations, or steps in routing.

Form	Description
Capacity load	You can use capacity load to analyze the difference between the required labor resources (load) and the available labor resources (capacity) for any time period that you specify. You can review load versus capacity for a dispatch group or for individual work centers within the dispatch group.
Period summary	You can review detailed information about the work orders that are scheduled to be completed within a time period that you specify. You can also review a summary of the total capacity load for all work orders within a time period.

Understanding Labor Plan Generation

You can generate a labor plan to assist you in planning labor resources for the maintenance tasks. When you generate a labor plan, the system compares available labor resources with the labor resources that are required by forecasted (planned) work orders and actual (firm) work orders. Based on this comparison, the system generates messages that alert you to over-capacity and under-capacity conditions:

Message	Description
Over-capacity Over-capacity: explanation	When the system identifies an over-capacity condition, fewer labor resources are available than needed. You must adjust the resources or reschedule the sequence of maintenance tasks to correct an over-capacity condition.
Under-capacity Under-capacity: explained	When the system identifies an under-capacity condition, it indicates that the labor resources are not being used to their full potential. You should adjust the resources or reschedule the sequence of maintenance tasks to better use the labor resources.

Ideally, you adjust the resources and schedule the maintenance tasks to achieve 100 percent capacity throughout the maintenance organization.

Every time that you generate a labor plan, the system deletes all of the previous capacity messages, except messages that you direct the system to hold and messages that you enter manually.

When you select data for labor plan generation, it is recommended you set critical work centers not equal to 4. A critical work center is a work center that you want the system to include as a demand for labor resources when the system processes a labor plan.

When you set processing options on the Process tab, JD Edwards EnterpriseOne Plant and Equipment Management users should:

- Select the same version of inclusion rules for material planning and capacity planning.

- Select the Capacity Requirements Planning option to include all work centers in the labor plan.

Prerequisite

You must generate a parts plan before you generate a labor plan.

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See *Generating a Parts Plan*.

Forms Used to Review Labor Messages

Form Name	FormID	Navigation	Usage
Work With Capacity Message Summary	W3301A	Labor Planning (G1324), Review Dispatch Group	Review labor messages by dispatch group or by work center.
Work With Capacity Messages	W3311B	Select the record for the work center with the message that you want to review. To prevent the system from deleting a message when you run the Labor Plan Generation program, select the record for the message and then select Hold/Release from the Row menu. To clear a message from the form without deleting it, select the record for the message and then select Clear from the Row menu.	Review detailed capacity requirements for each work center.
Capacity Message Revisions	W3311A	Select the record for the message on the Work With Capacity Messages form, and click Select.	Delete a message.

Generating the Labor Plan

Select Labor Planning (G1324), Labor Plan Generation.

> **Note:**
>
> - *"Setting Processing Options for CRP, RCCP Regeneration (R3382)" in the   JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide   .*

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Setting Processing Options for the Capacity Message Summary Program (P3301)

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

Defaults

1. Enter the Critical Work Center Code to be displayed or blank for all Work Centers.
Specify a code that indicates whether the work center is critical or not critical when the system calculates capacity. Values are:

Blank: All Work Centers.

N: Not a critical work center.

1: A critical work center in calculating RRP only.

2: A critical work center in calculating RCCP and CRP.

3: A critical work center in calculating RRP, RCCP, and CRP. The system also displays Type 3 work centers when you select type **1** or type **2** in this field.

4: Not a capacity work center. The system does not include this work center in capacity planning.

> **Note:** The data selection is a system feature that processes certain groups of information with the RRP, RCCP, and CRP programs.

2. Enter the Capacity Mode:
Specify a code indicating which planning is being used. Values are:

1: Resource Requirements Planning.

2: Rough Cut Capacity Planning.

3: Capacity Requirements Planning.

3. Enter the default Unit of Measure.
Enter a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity.

For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

Versions

Work Center Revision (P3006)
Specify the version for each program.

Blank: ZJDE0001.

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Reviewing Labor Messages by Dispatch Group

Access the Work With Capacity Message Summary form.

Work Center Branch

Enter a code that represents a high-level business unit.

Use this code to refer to a branch or plant that might have departments or jobs, which represent lower-level business units, subordinate to it. For example:

- ○ Branch/Plant (MMCU)
- ○ Dept A (MCU)
- ○ Dept B (MCU)
- ○ Job 123 (MCU)

Business unit security is based on the higher-level business unit.

Setting Processing Options for the Capacity Planning Message Revisions Program (P3311)

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

Defaults

1. Enter the Capacity Mode:

Specify a code indicating which planning is being used. Values are:

1: Resource Requirements Planning.

2: Rough Cut Capacity Planning.

3: Capacity Requirements Planning.

2. Enter the default Unit of Measure.

Enter a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity.

For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

3. Enter the default version of Work Center Revision (P3006)

Specify a version of the Work Center Revisions program (P3006).

Blank: ZJDE0001.

Reviewing Messages by Work Center

Access the Work With Capacity Message Summary form.

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Regarding the Capacity Mode (1) processing option for the Capacity Planning Message Revisions program (P3311), the JD Edwards EnterpriseOne Maintenance Planning System does not use JD Edwards EnterpriseOne Resource Requirements Planning.

Reviewing Capacity Load

This section provides an overview of capacity loads and discusses how to:

- Set processing options for the Capacity Load program (P3313).
- Review capacity load by work center.
- Set processing options for the Period Summary program (P3312).
- Reviewing capacity load by period summary.

Understanding Capacity Load

You can use capacity load information to help you optimize the labor resource allocations. You can compare the load that is created by the maintenance tasks with the labor resources that are available to perform the maintenance tasks.

When you review detailed capacity load information by work center, you specify a work center and the unit of measure, such as hours, by which you track the maintenance tasks.

You can review all of the maintenance tasks that make up the capacity load on a work center. You can also specify the planning period that you want to review. In addition, you can:

- Identify the percentage of the total load for the work center for which each maintenance task accounts.
- Identify the resource units, such as hours, that are required for each maintenance task.

Forms Used to Review Capacity Load

Form Name	FormID	Navigation	Usage
Review Work Center Load	W3313A	Labor Planning (G1324), Capacity Load	Review capacity load by work center.
Work With Period Summary Review	W3312A	Labor Planning (G1324), Period Summary	Review capacity load by period summary

Setting Processing Options for the Capacity Load Program (P3313)

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

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Defaults

1. Enter the Capacity Mode.

Specify a code indicating which planning is being used. Values are:

1: Resource Requirements Planning.

2: Rough Cut Capacity Planning.

3: Capacity Requirements Planning.

2. Enter the User-Defined Code for the list of row descriptions to appear.

Specify a code that identifies the table that contains UDCs.

The table is also referred to as a user-defined code type.

3. Enter the default Unit of Measure.

Enter a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity.

For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

4. Enter the version of the Dispatch List program to call.

Specify a user-defined set of specifications that control how applications and reports run.

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

Blank: ZJDE0001.

Versions

Operation Dispatch Inquiry (P31220)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

Blank: ZJDE0001.

> **Note:** Do not modify the JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes.

Reviewing Capacity Load by Work Center

When you review detailed capacity load information by work center, you specify a work center and the unit of measure, such as hours, by which you track the maintenance tasks. Depending on how you set up the system, the system provides some or all of this information by period:

Information	Description
Released load	The load that is created from actual (firm) work orders.
Planned load	The load that is created from forecasted (planned) work orders.

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Information	Description
Total load	The released load, plus the planned load.
Gross capacity	The units that are available from the work center.
Rated capacity	The available units, factored by efficiency and utilization. Efficiency is a user-defined value that indicates how efficiently a work center operates. Utilization is a ratio of the actual time that a work center charges for maintenance activities to the planned time.
Percent of capacity used	The total load, divided by the rated capacity.
Available capacity	The rated capacity, minus the total load.
Accumulated available capacity	A running total of available capacity.

Setting Processing Options for the Period Summary Program (P3312)

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

Defaults

1. Enter the Capacity Mode.
Specify a code indicating which planning is being used. Values are:

1: Resource Requirements Planning.

2: Rough Cut Capacity Planning.

3: Capacity Requirements Planning.

2. Enter the default Unit of Measure.
Enter a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity.

For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

3. Enter the version of the Dispatch List to call.
Specify a user-defined set of specifications that control how applications and reports run.

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

Blank: ZJDE0001.

Versions

1. Work Center Revision (P3006)

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Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

Blank: ZJDE0001.

2. Forecast Revision (P3460)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

Blank: ZJDE0001.

3. MRP/MPS Message Revision (P3411)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

Blank: ZJDE0001.

4. Mfg Scheduling Workbench (P31225)

Specify a specific set of data selection and sequencing settings for the application.

Versions may be named using any combination of alpha and numeric characters.

Blank: ZJDE0001.

Reviewing Capacity Load by Period Summary

Use period summary to review all of the maintenance tasks that make up the capacity load on a work center. You can also specify the planning period that you want to review. In addition, you can:

- Identify the percentage of the total load for the work center for which each maintenance task accounts.
- Identify the resource units, such as hours, that are required for each maintenance task.

Revising Labor Resources

This section provides an overview of labor resources and discusses how to set processing options for the Operation Dispatch Inquiry program (P31220).

Understanding Labor Resources

After you have identified which work centers have over-capacity and under-capacity conditions, you should revise labor resources to correct the conditions and balance the workload. When you correct over-capacity and under-capacity conditions, you help maximize the efficiency of the maintenance organization and save costs.

You can use these methods to revise labor resources:

- Change the date to perform the maintenance task.
- Revise the labor resources that are allocated to a work center.

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For example, suppose that you have several work orders scheduled on a day that is 40 percent over capacity. You notice the next workday is 35 percent under capacity. You can balance the capacity load by rescheduling a portion of the work orders for the next day. You also can reschedule individual operation sequences (routing steps) on a work order.

You can make short-term revisions to the work center that is responsible for the maintenance tasks. For example, you can:

- Indicate additional resources for a particular workday.

- Add workdays to a workweek.

- Revise the efficiency of the work center.

You can revise work order dates to correct over-capacity and under-capacity conditions. For example, supposed that you have several work orders scheduled on a day that is 40 percent over capacity. You notice the next workday is 35 percent under capacity. You can balance the capacity load by rescheduling a portion of the work orders for the next day. You can also reschedule individual operation sequences (routing steps) on a work order.

Forms Used to Revise Work Order Dates

Form Name	FormID	Navigation	Usage
Review Work Center Load	W3313A	Labor Planning (G1324), Capacity Load	Locate work center load information.
Work With Operation Dispatch	W31220B	Select Dispatch List from the Form menu on the Review Work Center Load form.	Locate operation dispatch information.
Operation Dispatch Detail Revisions	W31220A	Select the record for the work order and then select Op Disp Rev (operation dispatch revisions) from the Row menu.	Specify start date and requested date information.
Work Order Routing	W3112E	Select Routing Rev (routing revisions) on the Work With Operation Dispatch form.	Reschedule individual operation sequences on the work order. Complete the Operation Sequence field for each operation sequence that you want to reschedule.

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Setting Processing Options for the Operation Dispatch Inquiry Program (P31220)

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

Defaults

1. Enter the Default OPERATION Status Information to preload to the screen at initial inquiry. If left blank, no value will be pre-loaded:

From Status

Enter a value from UDC 31/OS (Operation Status) on the Work with Operation Dispatch form.

The from status specifies the beginning date for the selection of work order information.

Thru Status

Enter a value from UDC 31/OS (Operation Status) on the Work with Operation Dispatch form.

The thru status specifies the end date for the selection of work order information.

2. Enter the Default Number of Days:

Prior to today's date for the from date

Specify the from date on the Work with Operation Dispatch form.

You can specify a from date prior to the current date by entering the number of days that the system must subtract from the current date. For example, if the current date is June 15, and you want the system to use June 10, as the from date, you enter **5.** The system subtracts five days and sets the from date to June 10.

Blank: The system uses the current date as the from date.

> **Note:** The From Date/Period field specifies that the system displays transactions beginning with this date or period. Totals are calculated for the transactions that appear.

After today's date for the thru date

Specify the thru date on the Work with Operation Dispatch form.

You can specify a thru date later than the current date by entering the number of days that the system adds to the current date. For example, if the current date is June 15, and you want the system to use June 20, as the thru date, you enter **5.** The system adds five days and sets the thru date to June 20.

Blank: The system uses the current date as the thru date.

> **Note:** The Thru Date/Period field specifies that the system displays transactions ending with this date or period. Totals are calculated for the transactions that appear.

Versions

Enter the version to be used for each program.

1. Work Order Processing (P48013)

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Specify the version that the system uses when you select the Work Order Entry program (P48013) from the Row menu on the Work With Operation Dispatch form.

Blank: ZJDE0001.

> **Note:** This program is designed for use with manufacturing work orders, and not service or maintenance work orders.

2. Work Order Routing (P3112)

Specify the version that the system uses when you select the Work Order Routing program (P3112) from the Row menu on the Work With Operation Dispatch form.

Blank: ZJDE0001.

3. Work Order Parts List (P3111)

Specify the version that the system uses when you select the Work Order Parts List program (P3111) from the Row menu of the Work With Operation Dispatch form.

Blank: ZJDE0001

4. Work Order Parts Inquiry (P3121)

Specify the version that the system uses when you select the Work Order Parts List Inquiry program (P3121) from the Row menu on the Work With Operation Dispatch form.

Blank: ZJDE0001.

5. Operation Dispatch Inquiry (P31220)

Specify the version that the system uses when you select the Operation Dispatch Inquiry program (P31220) from the Row menu on the Work With Operation Dispatch form.

Blank: ZJDE0001.

6. Work Order Quantity (P31121)

A user-defined set of specifications that control how applications and reports run.

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

Blank: ZJDE0001.

7. Work Order Hours (P31122)

A user-defined set of specifications that control how applications and reports run.

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

Blank: ZJDE0001.

8. Scheduled WO Operations (P313003X) (Release 9.2 Update)

Specify the version of the Scheduled Work Order Operations program (P313003X) that the system uses when you select Reschedule WO from the Row menu. If you leave this processing option blank, the system uses version ZJDE0001.

> **Note:** This program is designed for use with manufacturing work orders, and not service or maintenance work orders.

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Process

1. Quantity Calculation

Specify whether the system subtracts the quantity scrapped or canceled from the remaining quantity. Values are:

Blank: Include the quantity scrapped or canceled in the remaining quantity.

1: Subtract the quantity scrapped or canceled from the remaining quantity.

Revising Resource Units for a Work Center

You can revise resource units for a work center to correct over-capacity and under-capacity conditions. Use the Craft Resource Units form to make short-term revisions to the work center that is responsible for the maintenance tasks. For example, you can:

- Indicate additional resources for a particular workday.

- Revise the efficiency of the work center.

In addition, you can add or subtract workdays to the workday calendar. For example, you might want to add a Saturday to the workweek to compensate for an over-capacity condition.

> **Note:** When you need to make permanent or long-term resource revisions to a work center, use the Work Center Master Revision form.

> **Note:**
>
> - *"Setting Up Shifts in the Manufacturing Constants" in the   JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide   .*

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23 Working with Failure Analysis

Understanding Failure Analysis

The JD Edwards EnterpriseOne Failure Analysis module is the database that enables you to associate failures, analyses, and resolutions with cases and work orders.

You can manage all of the aspects of JD Edwards EnterpriseOne Failure Analysis, including this information:

Failure Analysis Type

A category that distinguishes among failures, analyses, and resolutions.

Failure Analysis Code

A user-defined code describing failures, analyses, and resolutions.

Failure Analysis Tree

A hierarchy of failure analysis codes that are used as a means of selecting codes for a failure, analysis, or resolution.

Failure

The problem according to the customer. Failures are stored separately from analyses and resolutions, and can be searched for and reused for other issues.

Analysis

The cause of the failure. Analyses are stored separately from failures and resolutions.

Resolution

The correction for the failure of an issue. Resolutions are stored separately from analyses and failures and can be searched for and reused for other issues.

Unit of Failure Analysis

A piece of information that consists of failure analysis codes, descriptions, and media objects.

Three failure analysis types (failures, analyses, and resolutions) are used to distinguish units of failure analysis.

Pareto Analysis

The method of ranking the analyses and resolutions of a problem to identify those that occur most commonly.

Setting Up Failure Analysis

This section describes how to set up JD Edwards EnterpriseOne Failure Analysis and discusses how to:

- Set up Failure Analysis constants.
- Set up processing options for the Failure Analysis Codes program (P17761).
- Set up Failure Analysis codes.
- Define Failure Analysis tree names.
- Set up the Failure Analysis tree structure.
- Set up Failure Analysis sequences.

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Understanding Failure Analysis Setup

Before you can use JD Edwards EnterpriseOne Failure Analysis to assist you in resolving cases or work orders, you must set up the system constants, codes, trees, failures, analyses, and resolutions to use later when you enter data into the system.

You also need to set up user-defined codes (UDCs) for JD Edwards EnterpriseOne Failure Analysis.

Forms Used to Set Up Failure Analysis Information

Form Name	FormID	Navigation	Usage
S/WM System Constants Revisions	W17001C	For Capital Asset Management: Plant & Equipment Management (G1341), Service & Warranty Constants For Service Management: Service & Warranty Setup (G1740), Service & Warranty Constants	Set up Failure Analysis constants. Enable the interface with other systems by selecting the S/WM Installed option. Require users to select codes from the failure analysis tree by selecting the Use Failure Analysis Tree for Selecting Failure Analysis Codes option. Provide a method of approving records for reuse by selecting the Use Workflow for Approving Failure Analysis for Re-Use option. Select other options as appropriate.
Work with Failure Analysis Codes	W17761A	Failure Analysis Setup (G1749), Failure Analysis Codes	Review failure types and failure analysis codes.
Failure Analysis Code Revisions	W17761B	Click Add on the Work with Failure Analysis Codes form.	Set up Failure Analysis codes. Enter failure analysis codes (which can consist of up to 15 alphanumeric characters) and descriptions. The other information that you can enter is optional.

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Form Name	FormID	Navigation	Usage
Language Overrides	W17761C	Select the appropriate code on the Failure Analysis Code Revisions form, and then select Language from the Row menu.	Attach descriptions in foreign languages.
Work with Failure Analysis Tree Names	W17762A	Failure Analysis Setup (G1749), Failure Analysis Tree Entry	Locate or add tree names.
Failure Analysis Tree Name Revisions	W17762B	Click Add on the Work with Failure Analysis Tree Names form.	Define Failure Analysis tree names. Indicate whether the tree name is for a failure, an analysis, a resolution, or a combination of all three. Specify optional information, such as equipment number, inventory item number, product model, product family, product component, and environment.
Failure Analysis Tree	W17763A	Locate the tree name to which you are adding a hierarchical structure on the Work with Failure Analysis Tree Names form. Select Tree from the Row menu.	Review the Failure Analysis tree structure (the hierarchical structure).
Failure Analysis Tree Revisions	W17763B	Define how the code descriptions appear on the Failure Analysis Tree form, and then click Add.	Set up the Failure Analysis tree structure. Enter a parent code and all of its children for the tree structure. You can also add children to an existing parent code.
Failure Analysis Sequences	W17769A	Failure Analysis Setup (G1749), Failure Analysis Sequences	Set up Failure Analysis sequences. Enter **Y** or **N** in the sequence fields, including Equipment Number, Inventory Number, Product Model, Product Family,

Form Name	FormID	Navigation	Usage
			Product Component, and Environment.

Setting Up Failure Analysis Constants

You set up constants to define default information for the entire system. Constants control the types of information that you track and the rules that the system uses to perform certain calculations.

Access the SWM System Constants Revisions form.

Setting Processing Options for the Failure Analysis Codes Program (P17761)

Use these processing options to supply the default values for the Failure Analysis Codes program.

Defaults

These processing options specify the default values for the failure analysis type and codes.

1. Failure Analysis Type
Specify the default failure analysis type.

The system uses this information when searching for and also adding failure analysis codes. Values are:

Blank: All

1: Failure

2: Analysis

3: Resolution

2. Failure Analysis Code CC 1,3. Failure Analysis Code CC 2,4. Failure Analysis Code CC 3,5. Failure Analysis Code CC 4, and 6. Failure Analysis Code CC 5
Enter a value from the appropriate UDC that specifies the default Failure Analysis Code Category Code.

The system uses this information when searching for and also adding failure analysis codes.

Setting Up Failure Analysis Codes

Access the Failure Analysis Code Revisions form.

Set up failure analysis codes if you use codes to define a unit of failure. The codes are the building blocks of the tree, but you are not required to set up trees to use failure analysis codes. You can use these codes with failures, analyses, and resolutions that are associated with cases or work orders.

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The system does not recognize these codes until you attach them to a transaction. You can associate codes with a failure, analysis, or resolution by using a tree, which standardizes how the codes are defined. Alternatively, you can select a code from a table.

When you create failures, analyses, and resolutions, you can associate as many as seven failure analysis codes to define the failure, analysis, or resolution. You can also create as many as five UDCs to associate with each failure analysis code; you might create these codes for reporting purposes. You must set up failure analysis codes if you are using the failure analysis tree.

You can assign these failure analysis types to failure analysis codes:

- Failure
- Analysis
- Resolution
- All of these

Defining Failure Analysis Tree Names

Access the Failure Analysis Tree Name Revisions form.

Define failure analysis tree names to give logical meaning to a hierarchical structure of failure analysis codes and types.

Setting Up the Failure Analysis Tree Structure

Access the Failure Analysis Tree form.

After you define a failure analysis tree name, set up the structure for the tree. When you set up a tree, you create a hierarchical structure of failure analysis codes by using a parent/child relationship.

Ensure that you define the failure analysis codes that you plan to use when you create the tree structure.

Setting Up Failure Analysis Sequences

Access the Failure Analysis Sequences form.

Failure Analysis Sequences enable you to manage how failure analysis trees are chosen when using the visual assist on the Failure Description, Analysis Description, or Resolution Description fields in the Failure Analysis program (P17767). The hierarchy determines the order that the system uses to search for a match between the failure analysis tree and the failure analysis sequences. Set up the hierarchy from specific to general. For performance reasons, you should set up only necessary sequences.

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Setting Up Failures, Analyses, and Resolutions

This section provides an overview of failures, analyses, and resolutions and discusses how to:

- Set processing options for the Work with Failure Analysis program (P17766).
- Set up failures, analyses, and resolutions by code.
- Set up failures, analyses, and resolutions by tree.
- Set processing options for the Failure Analysis Tree Names program (P17762).
- Attach failures, analyses, and resolutions to a tree.

Understanding Failures, Analyses, and Resolutions

Based on prior experience, a business might identify common or recurring failures, analyses, or resolutions, which you can set up to reuse existing information. You can attach this information to new cases or work orders.

A failure, analysis, or resolution is composed of this information:

- As many as seven failure analysis codes selected from either a failure analysis tree or the failure analysis code table.
- A description that is no more than 80 characters.
- Media objects, such as:
  - Text documents.
  - Images.
  - Object, Linking, and Embedding (OLE) objects.
  - Shortcuts.

If you select the Use Workflow for Approving Failure Analysis for Re-Use option in the SWM constants, records must go through the workflow approval process. If the constant is off, records are automatically approved.

When you add records for failures, analyses, and resolutions, the records are separate and not associated with each other. The relationship between records is built only within a work order or a case.

Forms Used to Set Up Failures, Analyses, and Resolutions

Form Name	FormID	Navigation	Usage
Work with Failure Analysis	W17766C	Failure Analysis Setup (G1749), Failure Analysis.	Set up failures, analyses, and resolutions by code or by tree.
Work with Failure Analysis Tree Names	W17762A	Failure Analysis Setup (G1749), Failure Analysis Tree Entry.	Review failures, analyses, and resolutions information in a tree structure.

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Form Name	FormID	Navigation	Usage
Failure Analysis Tree Name Revisions	W17762B	Click Add on the Work with Failure Analysis Tree Names form.	Attach failures, analyses, and resolutions information to a tree.

Setting Processing Options for the Work With Failure Analysis Program (P17766)

Use these processing options to supply the default values for the Work With Failure Analysis program.

Defaults

These processing options specify the default values that the system uses to search for failure analysis records.

1. Failure Analysis Type
Specify the default failure analysis type.

The system uses this when searching for failure analysis records. Values are:

Blank: All

1: Failure

2: Analysis

3: Resolution

2. Failure Analysis Approval Flag
Enter a value from the UDC 48/KA (Failure Analysis Approval Flag) that specifies the default failure analysis approval flag.

The system uses this when searching for failure analysis records.

3. Order Type
Enter a value from UDC 00/DT (Document Type - All Documents) that specifies the default order type.

The system uses this when searching for failure analysis records.

4. Product Family
Enter a value from UDC 17/PA (Product Family) that specifies the default product family.

The system uses this when searching for failure analysis records.

5. Product Model
Enter a value from UDC 17/PM (Product Model) that specifies the default product model.

The system uses this when searching for failure analysis records.

6. Product Component
Enter a value from UDC 17/PC (Product Component) that specifies the default product component.

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The system uses this when searching for failure analysis records.

7. Environment

Enter a value from UDC 17/EN (Environment) that specifies the default environment.

The system uses this when searching for failure analysis records.

Process

These processing options specify the default values that the system uses during failure analysis processing.

1. Media Object Display

Specify which item in the media object that the system displays first when you view media objects. Values are:

Blank: Display the first generic text item.

1: Display the first image item.

2: Display the first OLE item.

3: Display the first URL or file item (for future use).

2. Approvals Access

Specify whether to enable users to access the approvals form and modify the status (such as approved or rejected) of a failure analysis record. Values are:

Blank: Do not enable access to approvals.

1: Enable access to approvals.

Versions

This processing option specifies the version of Failure Analysis Revisions that the system uses.

1. Failure Analysis Revisions (P17767) Version

Specify which version of Failure Analysis (P17767) that the system uses when you add or update failure analysis records.

Blank: ZJDE0001.

Setting Up Failures, Analyses, and Resolutions by Code

Access the Work With Failure Analysis form.

To setup by code:

1. Select the Failure option and then click Add.
2. Complete the fields to define a failure on the Failure Analysis Revisions form.

3. Select the Failure tab, and complete the Failure Description field.

   > **Note:**
   >
   > Depending on how you have set the Use Failure Analysis Tree for Selecting Failure Analysis Codes option in
   >
   > the SWM constants, when you search for values in the Failure Description field, one of these options occurs:
   >
   > - On the Failure Analysis Search & Select form, the system lists the existing failure analysis records from which you can select a record (this task).
   > - On the Failure Analysis Tree Name Search & Select form, the system lists the tree names from which you can select a tree.

4. To add media objects or text descriptions that are longer than 80 characters, attach the information in the media object area.
5. Select the Failure Codes tab to attach failure codes to this record and to complete any or all of the Failure Analysis Code IDs fields.

   > **Note:** If you make a mistake while adding a record, you can start over by choosing the appropriate Clear Failure, Clear Analysis, or Clear Resolution option from the Form menu.

6. Click OK and then click Cancel.
7. On the Work With Failure Analysis form, to add an analysis, select the Analysis option and then click Add.
8. Repeat steps 2 through 6 using the Analysis and the Analysis Codes tabs.
9. On the Work With Failure Analysis form, to add a resolution, select the Resolution option and then click Add.
10. Repeat steps 2 through 6 using the Resolution and Resolution Codes tabs.
11. On the Work With Failure Analysis form, if you want to add failures, analyses, and resolutions all at the same time, select the All option and then click Add.
12. Repeat steps 2 through 6, using all the tabs as needed.
13. When you finish adding failures, analyses, and resolutions, click OK.
14. The Failure Analysis Details Update window is displayed prompting you to confirm whether you want to save the updates for Pareto Analysis and increment the total number of hits.

    Click Yes if you want to update your details for Pareto Analysis. Click No if you only want to view the Pareto details.

Product Component

Enter the components that make an equipment number or components associated with a customer site.

Environment

Enter the operating environment of the user.

Some examples:

- Windows 95
- Windows NT
- UNIX
- AS/400

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Setting up Failures, Analyses, and Resolutions by Tree

Access the Work With Failure Analysis form.

To setup by tree:

1. Select the Failure option and then click Add.
2. Complete the fields to define a failure on the Failure Analysis Revisions form.
3. Select the Failure tab, and complete the Failure Description field.

   > **Note:**
   >
   > Depending on how you have set the Use Failure Analysis Tree for Selecting Failure Analysis Codes option in
   >
   > the SWM constants, when you search for values in the Failure Description field, one of these options occurs:
   >
   > - On the Failure Analysis Tree Name Search & Select form, the system lists the tree names from which you can select a tree (this task).
   > - On the Failure Analysis Search & Select form, the system lists the existing failure analysis records from which you can select a record.

4. On the Failure Analysis Tree Name Search & Select form, select a tree name and click Select.
5. On the Failure Analysis Tree Search & Select form, expand the tree, select a code, and click Select.

   On the Failure tab of Failure Analysis Revisions form, the system displays the failure description from the tree. The code structure from the tree is also automatically loaded into the Failure Analysis Code ID fields on the Failure Codes tab.
6. To add media objects or text or to revise the text that the system retrieves from the last failure code, attach the information in the media object area.

   > **Note:** If you make a mistake while adding a record, you can start over by choosing the appropriate Clear Failure, Clear Analysis, or Clear Resolution option from the Form menu.

7. Click OK, and then click Cancel.
8. On the Work With Failure Analysis form, to add an analysis, select the Analysis option and then click Add.
9. Repeat steps 2 through 7 using the tree name and analysis description.
10. On the Work With Failure Analysis form, to add a resolution, select the Resolution option and then click Add.
11. Repeat steps 2 through 7 using the tree name and resolution description
12. On the Work With Failure Analysis form, if you want to add failures, analyses, and resolutions all at the same time, select the All option and then click Add.
13. Repeat steps 2 through 7, using all the tabs as needed.
14. When you finish adding failures, analyses, and resolutions, click OK.
15. The Failure Analysis Details Update window is displayed prompting you to confirm whether you want to save the updates for Pareto Analysis and increment the total number of hits.

    Click Yes if you want to update your details for Pareto Analysis. Click No if you only want to view the Pareto details.

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Setting Processing Options for the Failure Analysis Tree Names Program (P17762)

Use these processing options to supply the default values for the Failure Analysis Tree Names program.

Defaults

This processing option specifies the failure analysis type.

1. Failure Analysis Type
Specify the default failure analysis type.

The system uses this when searching for and also adding failure analysis tree names. Values are:

Blank: All

1: Failure

2: Analysis

3: Resolution

Versions

This processing option specifies the version of the Failure Analysis Tree program that the system uses.

1. Failure Analysis Tree (P17763) Version
Specify which version of Failure Analysis Tree program (P17763) that the system uses.

Blank: ZJDE0001.

Attaching Failures, Analyses, and Resolutions to a Tree

Access the Work with Failure Analysis Tree Names form.

To attach failures, analyses, and resolutions to a tree:

1. Locate and select a tree name, and select Tree from the Row menu.
2. On the Failure Analysis Tree form, expand the trees to view the detail.

   > **Note:** A paper clip with a check mark button indicates that failure, analysis, or resolution records are attached to the tree node.

3. Select a detail line that does not have the paper clip with a check mark button, and then select Add F/A Association from the Row menu.
4. On the Failure Analysis Search & Select form, locate the appropriate record that you want to attach to the tree and click Select.

   On the Failure Analysis Tree form, the failure, analysis, or resolution record is now attached, and the system displays the paper clip with a check mark button on the detail line.

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5. If you need to remove the attached record, on the Failure Analysis Search & Select form, select the detail line and select Remove Association from the Row menu.

   The system displays a warning message that you are about to remove the association.

6. Click OK.

   On the Failure Analysis Tree form, the failure, analysis, or resolution record is now detached, and the system no longer displays the paper clip with a check mark button on the detail line.

7. When you finish adding or removing failure analysis information, click Close.

Working with Failure Analysis Transactions

When you use failure analysis, you first attach a failure record to a work order or case. Then you attach an analysis and resolution to that failure.

When you enter the failure analysis database from a work order or case, the system displays the failure that is associated with the issue. If a standard, reusable failure was used, the failure entry information is disabled. If a nonstandard failure was used, the failure fields are enabled.

This section discusses how to:

- Attach failure information to a work order or a case.

- Attach analyses and resolutions to a failure.

Forms Used to Work with Failure Analysis Transactions

Form Name	FormID	Navigation	Usage
Work With Work Orders	W48201F	For Capital Asset Management; Work Order (G1316), Work Order Entry. For Service Management: Daily Work Order Processing (G1712), Work Order Entry.	Locate a work order to which you want to attach failure information.
Work With Case Management	W17500A	For Case Management: Daily Case Processing (G17132), Case Entry	Locate a case to which you want to attach failure information.
Failure Analysis Revisions	W17767A	Select a work order or a case: Locate and select a work order on the Work With Work Orders form. Locate and select a case on the Work With Case Management form.	Attach failure information to a work order or case.

Form Name	FormID	Navigation	Usage
		Select Failure Analysis and then Add/Revise FA from the Row menu.	
Work with Failure Analysis	W17766C	Failure Analysis (G17191), Failure Analysis	Locate a failure to which you want to attach analysis and resolution information.

Attaching Failure Information to a Work Order or a Case

Access either the Work With Work Orders form or the Work With Case Management form.

To attach failure information:

1. Locate and select a specific work order or case. From the Row menu, select Failure Analysis and then Add/Revise FA.
2. On the Failure tab of the Failure Analysis Revisions form, enter a failure description or search for values in the Failure Description field.

   Note: When you click the Search button, an SWM constant controls whether the system uses failure analysis trees or the search and select program.

3. Select one of these actions:
   - If you are using the Search button and if the SWM constant is set to use failure analysis trees, go to step 4.
   - If you are using the Search button and if the SWM constant is not set to use failure analysis trees, go to step 6.
   - If you are not using the Search button, go to step 9.
4. On the Failure Analysis Tree Name Search and Select form, select a tree name that applies to the specific issue.

   Note: If you set up failure analysis sequences using the Failure Analysis Sequences program (P17769), the system might not display the Failure Analysis Tree Name Search and Select form if an exact tree match is found.

5. On the Failure Analysis Tree Search and Select form, browse through the tree to find a tree node that is similar to the issue, and then go to step 7.
6. On the Failure Analysis Search and Select form, browse through the information to find a record that is similar to the issue.
7. Select the issue and click Select.
8. On the Failure Analysis Revisions form, select the Modify Failure Record option to add information to an existing issue.

   Note: A processing option controls whether you can modify existing records. If you are not allowed to modify them, the option is disabled.

9. If you are adding a new failure or modifying existing records, enter the information in the media object text box.

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> **Note:** If you make a mistake while adding a failure record, you can start over by selecting Clear Failure from the Form menu.

10. Click OK to save the record.
11. The Failure Analysis Details Update window is displayed prompting you to confirm whether you want to save the updates for Pareto Analysis and increment the total number of hits.

    Click Yes if you want to update your details for Pareto Analysis. Click No if you only want to view the Pareto details.

The system returns to the Work With Work Orders form or the Work With Case Management form.

Attaching Analyses and Resolutions to a Failure

Access either the Work With Work Orders form or the Work With Case Management form.

To attach analyses and resolutions to failures:

1. Locate and select a specific work order or case.

   From the Row menu, select Failure Analysis and then Work with FA.
2. On the Work with Failure Analysis form, locate and select the existing failure, and select F/A/R Revisions from the Row menu.
3. On the Analysis tab of the Failure Analysis Revisions form, enter an analysis description or search for values in the Analysis Description field.

   > **Note:** When you click the Search button, an SWM constant controls whether the system uses failure analysis trees or the search and select program.

4. Click the Pareto button, if it appears.
5. Select one of these actions:

   - If you are using the Search button and if the SWM constant is set to use failure analysis trees, go to step 6.
   - If you are using the Search button and if the SWM constant is not set to use failure analysis trees, go to step 8.
   - If you are using the Pareto button, go to step 9.
   - If you are entering an analysis description manually, go to step 12.

6. On the Failure Analysis Tree Name Search and Select form, select a tree name that applies to the specific issue.

   > **Note:** If you set up failure analysis sequences by using the Failure Analysis Sequences program (P17769), the system might not display the Failure Analysis Tree Name Search and Select form if an exact tree match is found.

7. On the Failure Analysis Tree Search and Select form, browse through the tree to find a tree node that is similar to the issue, and then go to step 9.
8. On the Failure Analysis Search and Select form, browse through the information to find a record that is similar to the issue, and then go to step 9.
9. On the Failure Analysis Pareto Analysis form, locate a record that is similar to the issue.
10. Select the analysis and click Select.

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11. On the Failure Analysis Revisions form, to add information to an existing issue, select the Modify Analysis Record option.

12. If you are adding a new analysis or modifying existing records, enter the information in the media object text box.

13. Select the Analysis Codes tab, and select an existing code or enter a new code in any of the Failure Analysis Code IDs.

   Note: You do not need to enter information on the Analysis Codes tab if you used a standard, reusable analysis. The system supplies the default codes from the reusable record.

14. On the Resolution tab of the Failure Analysis Revisions form, enter a resolution description or use the visual assist in the Resolution Description field.

15. Click the Pareto button, if it appears.

16. Repeat steps 5 through 13, entering resolution information instead of analysis information, and using the Resolution tab and Resolution Codes tabs, and then go to step 17.

   Note: If you make a mistake while adding an analysis or a resolution record, you can start over by choosing the Clear Analysis option or the Clear Resolution option from the Form menu.

17. Click OK.

18. The Failure Analysis Details Update window is displayed prompting you to confirm whether you want to save the updates for Pareto Analysis and increment the total number of hits.

   Click Yes if you want to update your details for Pareto Analysis. Click No if you only want to view the Pareto details.

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24 Working with Role-Based Workspaces

Understanding Role-Based Workspaces

Role-based workspaces provide a simplified, configurable front end to JD Edwards EnterpriseOne Capital Asset Management (CAM). Role-based components that can be deployed to a workspace are essential for improving visibility into maintenance effectiveness and efficiency. The workspace provides an easy way for equipment personnel (maintenance planners, managers, equipment technicians, equipment operators, and so on) to view JD Edwards EnterpriseOne CAM-related information. For example, an equipment operator can enter a case, view the repair history of a piece of equipment, or view upcoming corrective or preventive maintenance orders.

Three main portal entry points for the JD Edwards EnterpriseOne CAM workspace are available:

- Manage Equipment
- Manage Work Order
- Manage Cases

The entry points can be considered a workbench, from which you can access detailed information about equipment, work orders, or cases. You can configure the entry points by role, such as by the Maintenance Planner role, which can provide an enterprise-wide view of all maintenance and operational activities. You can determine the functionality that is provided to the user through processing options.

The portal entry points are intended to be simple and not to provide the same full functionality as the traditional JD Edwards EnterpriseOne CAM applications. The entry points are additional front-end forms that access and update the same tables.

Mobile Applications for Meter Readings for Equipment

The following mobile application is available, and can be used to update meter readings for a piece of equipment on a mobile device:

- Manage Equip (Tablet)
- Service Equip (Tablet)

This application requires system administrator configuration before it is available to individual users. Contact your system administrator to determine whether this application is available for use.

Additionally, see the topics *Manage Equipment Mobile Applications* and *Manage Customer Equipment Mobile Applications* in the *JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide* .

Managing Equipment

This section provides an overview of managing equipment and discusses how to:

- Search for equipment records.
- Set processing options for the Equipment Search program (P1701E).

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- View equipment information detail.
- Set processing options for the Equipment Detail program (P1702E).
- View equipment status information.
- Set processing options for the Status History program (P1307E).
- Create and update equipment messages.
- Set processing options for the Equipment Messages program (P1205E).
- View equipment PM backlog.
- Set processing options for the Equipment PM Backlog program (P12071E).
- View equipment specification data.
- View and update meter readings.
- Set processing options for the Meter Readings program (P12120E).

Understanding Managing Equipment

You can inquire on many different programs to find all of the information that is required to efficiently manage the equipment. The Managing Equipment entry point enables you to link to a variety of equipment information from a single form. This feature reduces the amount of time spent searching for equipment information by equipment operators, technicians, planners, managers, and so on.

The Manage Equipment shortcut is a link to the Equipment Search program (P1701E).   From this workspace, you can:

- Search for equipment.
- View equipment information detail.
- View equipment status history.
- Create and update equipment messages.
- View the PM backlog.
- View equipment specification data.
- View and update meter readings.

The View Equipment Information form appears when you access Manage Equipment.

Searching for Equipment Records

Many of the daily tasks that you perform require the ability to locate a specific equipment record quickly. To locate an equipment record or group of records, you can use a variety of criteria. Here are some of the available fields that can be used to search for equipment:

- Equipment Number
- Description
- Business Unit
- Location

To search for equipment information, you use the Equipment Search program (P1701E). Once the desired equipment is found, you can go to other equipment-related applications (equipment detail, status history, and so on) by using the link columns in the grid.

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The grid columns provide links to the detail information and applicable programs to view, add, or update records.

If you want to see detail information on a piece of equipment, and the detail does not exist, the system displays a message stating that no data exists for the selected equipment.

Setting Processing Options for the Equipment Search Program (P1701E)

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

Defaults

Use these processing options to specify the information that populates into the form when searching for a piece of equipment.

1. Business Unit

Specify the default business unit.

The system assigns this value to the business unit search field on the equipment search form when the form opens.

2. Business Unit - Location

Specify the default location.

The system assigns this value to the location search field on the equipment search form when the form opens.

Display

Use these processing options to determine whether the system displays certain types of information.

1. Display Children

Specify whether to display child (component) equipment in the equipment search form. Values are:

Blank: Do not display children.

1: Display both parent and children.

2. Display Disposed

Specify whether to display disposed equipment in the equipment search form. Values are:

Blank: Do not display disposed equipment.

1: Display disposed equipment.

3. Display Meter Readings

Specify whether to display the Meter Readings column in the equipment search form. Values are:

Blank: Do not display Meter Readings column.

1: Display Meter Readings column.

4. Display PM Backlog

Specify whether to display the PM Backlog column in the equipment search form. Values are:

Blank: Do not display PM Backlog column.

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1: Display PM Backlog column.

5. Display Repair History

Specify whether to display the Repair History column in the equipment search form. Values are:

Blank: Do not display Repair History column.

1: Display Repair History column.

6. Display Parts List

Specify whether to display the Parts List column in the equipment search form. Values are:

Blank: Do not display Parts List column.

1: Display Parts List column.

7. Display Specification Data

Specify whether to display the Specification Data column in the equipment search form. Values are:

Blank: Do not display Specification Data column.

1: Display Specification Data column.

8. Display Messages

Specify whether to display the Messages column in the equipment search form. Values are:

Blank: Do not display Messages column.

1: Display Messages column.

9. Display Attachments

Specify whether to display the Attachments column in the equipment search form. Values are:

Blank: Do not display Attachments column.

1: Display Attachments column.

Versions

Use these processing options to specify the version that the system uses when you select the associated program.

1. Equipment Detail (P1702E) Version

Specify the version of the Equipment Detail program (P1702E) that you access from the equipment search form.

Blank: ZJDE0001

2. Status History (P1307E) Version

Specify the version of the Status History program (P1307E) that you access from the equipment search form.

Blank: ZJDE0001.

3. Equipment Messages (P1205E) Version

Specify the version of the Equipment Messages program (P1205E) that you access from the equipment search form.

Blank: ZJDE0001.

4. Meter Readings (P12120E) Version

Specify the version of the Meter Readings program (P12120E) that you access from the equipment search form.

Blank: ZJDE0001.

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5. PM Backlog (P12071E) Version

Specify the version of the Equipment PM Backlog program (P12071E) that you access from the equipment search form.

Blank: ZJDE0001.

6. Equipment Parts List (P13017E) Version

Specify the version of the Equipment Parts List program (P13017E) that the system uses from the Equipment Search form.

Blank: ZJDE0001.

7. Repair History (P48201E) Version

Specify the version of the Work Order Search program (P48201E) that the system uses from the Equipment Search form.

Blank: ZJDE0001.

Viewing Equipment Information Detail

Equipment Master information is the primary data that is associated with each piece of equipment in the system. The Edit Equipment Detail form enables you to view a subset of the Equipment Master information. You can see key information, such as:

- Identification numbers
- A description
- Location information
- Acquired and Installation dates
- A status

To view detail information for selected equipment, select the link in the Equipment Description column from the View Equipment Information form. The only field that can be updated is the equipment status, depending on the processing option settings. The rest of the information is for viewing only.

Setting Processing Options for the Equipment Detail Program (P1702E)

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

Process

Determine how the system processes information.

1. Allow Equipment Status Change

Specify whether to enable equipment status change from this program. Values are:

Blank: Do not allow equipment status change.

1: Allow equipment status change.

Viewing Equipment Status History

To inquire on the status history of a specific piece of equipment, click the Status link on the Equipment Search form. The status history for the piece of equipment appears in a grid format where you can see past, current, and future status information.

To update the status of a piece of equipment, click the Change Status link. You can update the start effective date, time, or both, and indicate whether the equipment's children should be updated with the status change.

Alternatively, this form automatically displays when you change the equipment status and click OK on the Edit Equipment Detail form. The date and time fields are populated with the current date, time, or both; however, you can change these values.

> **Note:**
>
> - *Tracking Equipment Status*.

Setting Processing Options for the Status History Program (P1307E)

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

Process

Determine how the system processes information.

1. Allow Equipment Status Change
Specify whether to enable equipment status change from this program. Values are:

Blank: Do not allow equipment status change.

1: Allow equipment status change.

Creating and Updating Equipment Messages

You should review equipment messages periodically to ensure that you have the most current information about a piece of equipment. This program is primarily used by maintenance planners, managers, equipment technicians, or operators to let each person know specific information about the equipment.

To view or edit equipment messages, select the link in the Messages column on the Equipment Search form. Additional filter fields are provided on the header to search by message type and tickler date. The grid displays equipment number, message, message type, tickler date, and other related information for the selected piece of equipment.

You can then view, update, or delete existing messages or add new messages for the selected equipment. To display the details of the message, click the link for the selected message.

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> **Note:**
>
> - *Working with Equipment Information*.

Setting Processing Options for the Equipment Messages Program (P1205E)

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

Defaults

Specify the default value.

1. Equipment Message Type

Enter a value from UDC 12/EM (Equipment Message Type) that specifies the default equipment message type.

Viewing Equipment PM Backlog

The Equipment PM Backlog program enables you to review the PM schedule for each piece of equipment that you maintain. To determine when a piece of equipment is due for maintenance, you must quickly obtain the status of the equipment and its maintenance cycle. Equipment PM Backlog provides the necessary information to determine when a piece of equipment needs to be serviced.

To view equipment preventive maintenance records for a selected piece of equipment, click the link in the PM Backlog column on the Equipment Search form. Using this application, you can view maintenance records for the selected equipment. This application is primarily used by maintenance planners, managers, equipment technicians, or operators.

You can use the additional filter fields to further refine the search. Some of the fields available are:

- Service type
- Maintenance status
- Scheduled date
- Maintenance due %

The grid displays the service type, PM status, completed date, assigned WO number, and other related information.

> **Note:**
>
> - *Working with Preventive Maintenance Schedules*.
>
> - *Updating PM Schedule Status Information*.
>
> - *Changing the Status of PMs to Complete*.

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Setting Processing Options for the Equipment PM Backlog Program (P12071E)

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

Defaults

Use these processing options to specify the default values.

1. Service Type

Enter a value from the UDC 12/ST (Service Types).

The system uses this default when searching for preventive maintenance schedules.

2. Maintenance Status - From

Enter a value from UDC 12/MS (Maintenance Status) that specifies the beginning maintenance status in a range of maintenance statuses.

The system uses this default when searching for preventive maintenance schedules.

3. Maintenance Status - To

Enter a value from UDC 12/MS (Maintenance Status) that specifies the ending maintenance status in a range of maintenance statuses.

The system uses this default when searching for preventive maintenance schedules.

4. Schedule Date - From

Specify the scheduled beginning date in a range of scheduled dates.

The system uses this default when searching for preventive maintenance schedules.

5. Schedule Date - To

Specify the scheduled ending date in a range of scheduled dates.

The system uses this default when searching for preventive maintenance schedules.

6. Completed Date - From

Specify the beginning completion date in a range of completion dates.

The system uses this default when searching for preventive maintenance schedules.

7. Completed Date - To

Specify the ending completion date in a range of completion dates.

The system uses this default when searching for preventive maintenance schedules.

8. Planned Start Date - From

Specify the planned beginning start date in a range of planned start dates.

The system uses this default when searching for preventive maintenance schedules.

9. Planned Start Date - To

Specify the planned ending start date in a range of planned start dates.

The system uses this default when searching for preventive maintenance schedules.

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10. Maintenance Due Percent - From

Specify the beginning maintenance-due percent in a range of maintenance-due percents.

The system uses this default when searching for preventive maintenance schedules.

11. Maintenance Due Percent - To

Specify the ending maintenance-due percent in a range of maintenance-due percents.

The system uses this default when searching for preventive maintenance schedules.

Viewing Equipment Specification Data

Specification data is used to enter static information about a piece of equipment.

To view equipment specification data for a selected piece of equipment, select the link in the Specification Data column on the Equipment Search form. This form is for inquiry only; it has no add or update functionality.

This form displays the list of the existing specification data pages for the equipment number. The equipment number appears on the header; the grid displays only one column called Page Number. When you click the page numbers, you can view the information on the selected page.

Once you select a page, the specification detail data for the equipment number and page number appear. The equipment number and page number appear in the header portion of the form, while the detail section displays the specification data (up to 16 fields).

> **Note:**
>
> - *Setting Up Specification Data for Equipment*.
>
> - *Entering Specification Information*.

Viewing and Updating Meter Readings

You use meter readings when you need to enter or update meter information about the equipment. You use meter readings to monitor equipment use and initiate maintenance tasks. The meter readings program is a simple application that enables you to view current readings, enter new readings, and enter or view the net increase for a single piece of equipment.

To view and enter meter readings for a selected piece of equipment, select the link in the Meter Readings column on the Equipment Search form. This provides similar functionality to the Meter Readings program (P12120); however, it does not provide access to meter rollover or meter change. When entering a meter reading, the entry date always uses the current date and cannot be manually changed.

You can determine the meters that you want to display and update, based on the processing option settings.

> **Note:**
>
> - *Working with Meter Readings*.

Setting Processing Options for the Meter Readings Program (P12120E)

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

Defaults

Use these processing options to control the information that the system displays.

1. Display Odometer Reading
Specify whether the program displays the current odometer reading and enables the odometer fields for entry. Values are:

Blank: Do not display odometer reading.

1: Display odometer reading.

2. Display Fuel Reading
Specify whether the program displays the current fuel meter reading and enables the fuel meter fields for entry. Values are:

Blank: Do not display fuel meter reading.

1: Display fuel meter reading.

3. Display Hour Reading
Specify whether the program displays the current hour meter reading and enables the hour meter fields for entry. Values are:

Blank: Do not display hour meter reading.

1: Display hour meter reading.

4. Display Meter 4 Reading
Specify whether the program displays the current meter 4 reading and enables the meter 4 fields for entry. Values are:

Blank: Do not display meter 4 reading.

1: Display meter 4 reading.

5. Display Meter 5 Reading
Specify whether the program displays the current meter 5 reading and enables the meter 5 fields for entry. Values are:

Blank: Do not display meter 5 reading.

1: Display meter 5 reading.

6. Display Meter 6 Reading
Specify whether the program displays the current meter 6 reading and enables the meter 6 fields for entry. Values are:

Blank: Do not display meter 6 reading.

1: Display meter 6 reading.

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Process

Specify how the system processes information.

1. Update Children Current Meters

Specify whether the system automatically updates the current meters of child assets when updating the parent's current meter. Values are:

Blank: Do not update current meters of child assets.

1: Update current meters of child assets.

Versions

Specify the version that the system uses when you select the associated program.

1. Update PM Schedule (R12807) Version

Specify which version of the Update PM Schedule Status program (R12807) the system uses when updating PM schedules. Values are:

Blank: Do not update PM schedules.

A specific version.

Edits

Determine the information that the system verifies.

1. Tolerance Level

Specify whether the system displays a tolerance level warning.

Enter the specific percentage difference in meter readings that the system uses to signal the warning.

For example, if you enter **5** in this field, then the system issues a warning if the new net increase amount differs more than 5 percent from the net increase amount of the last meter entry. Values are:

Blank: Do not check for tolerance levels but do display a tolerance level warning.

A specific percent.

Managing Work Orders

This section provides an overview of managing work orders and discusses how to:

- View work orders.
- Set processing options for the Work Order Search program (P48201E).
- View work order detail information.
- Set processing options for the Work Order Detail program (P17714E).
- Print work orders.
- View resource assignments.
- Set processing options for the Resource Assignments program (P48331E).

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- View related purchase orders.

- Set processing options for the Related Purchase Orders program (P134310E).

Understanding Managing Work Orders

Use work orders to manage the work flow of the maintenance tasks and projects. The Managing Work Orders entry point enables you to link to a variety of work order information so that you can manage the work orders more efficiently. This feature reduces the time that is spent searching for information because it is available on a single form.

The Manage Work Orders shortcut is a link to the Work Order Search program (P48201E). From this workspace, you can:

- View work orders.

- View work order detail information.

- Print a work order.

- View resource assignments.

- View related purchase orders.

Mobile Applications for Managing Work Orders

The following mobile applications are available, and can be used to manage work orders on a mobile device:

- Review Team Work Orders (Smartphone and Tablet)

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

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

- *Review Team Work Orders Mobile Applications*

Viewing Work Orders

You must be able to locate a specific work order quickly. To locate a work order or group of work orders, you can use a variety of criteria. Some of the available fields to search for work orders are:

- Order Number

- Equipment Number

- Order Type

- Originator

- Priority

- Status

To search for equipment work orders, you use the Work Order Search program (P48201E). Once the work order is found, you can access work order-related applications, and either view or update the information. Only work orders that are defined as equipment work orders (in document type maintenance) appear. The grid columns provide links to the applicable program to view, add, or update records.

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If you want to see detail information on the work order, and the detail does not exist, the system displays a message to inform you that no data exists for the selected work order.

Setting Processing Options for the Work Order Search Program (P48201E)

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

Defaults

Use these processing options to specify the default values for the system.

1. Work Order Document Type

Enter a value from the user-defined code (UDC) table 00/DT (Document Type - All Documents).

The system uses this value when searching for work orders.

The document type used here must be defined as Equipment Work Order document type in the Document Type Maintenance (P40040) program.

2. Work Order Type

Enter a value from UDC 00/TY (Work Order/ECO Type).

The system uses this value when searching for work orders.

3. Status Code - From

Enter a value from UDC 00/SS (Work Order Status) that specifies the beginning status code for a range of work orders.

The system uses this value when searching for work orders.

4. Status Code - To

Enter a value from UDC 00/SS (Work Order Status) that specifies the ending status code for a range of work orders.

The system uses this value when searching for work orders.

5. Default Originator

Specify whether the system enters the user's address book number as the default originator.

The system uses this value when searching for work orders. Values are:

Blank: Do not enter the user's address book number as the default originator.

1: Enter the user's address book number as the default originator.

6. Default Assignee

Specify whether the system enters the user's address book number as the default Assigned To value.

The system uses this value when searching for work orders. Values are:

Blank: Do not enter the user's address book number as the default Assigned To value.

1: Enter the user's address book number as the default Assigned To value.

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Display

Use these processing options to control the information that the system displays.

1. Include Models

Specify whether the system displays model work orders. Values are:

Blank: Do not display model work orders.

1: Display model work orders.

2. Display Work Orders for Child Assets

Specify whether the system displays work orders for child assets.

This option applies when you search for work orders for a specific asset. If this option is on, and you search for work orders by entering an asset (equipment) number in the search field, the program displays work orders for that asset and any of its children. Values are:

Blank: Do not display work orders for child assets.

1: Display work orders for child assets.

Categories

Use these processing options to specify the criteria that the system uses to search for work orders.

1. Phase

Enter a value from UDC 00/W1 (Phase/System Codes) that specifies the current stage or phase of development for work orders that the system uses to search for work orders.

2. Category Code 02

Enter a value from UDC 00/W2 (Work Order Category Code 2) that specifies the type or category of work orders that the system uses to search for work orders.

3. Category Code 03

Enter a value from UDC 00/W3 (Work Order Category Code 3) that specifies the type or category of work orders that the system uses to search for work orders.

Versions

Use these processing options to specify the versions that the system uses when you select the associated program.

1. Work Order Detail (P17714E) Version

Specify the version of the Work Order Detail program (P17714E) that the system accesses from the work order search form.

Blank: ZJDE0001.

2. Equipment Work Order Print (R48425) Version

Specify the version of the Maintenance Work Order Report program (R48425) that the system uses to generate maintenance work orders.

Blank: XJDE0001.

3. Resource Assignments (P43331E) Version

Specify the version of the Resource Assignments program (P48331E) that you access from the work order search form.

Blank: ZJDE0001.

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4. Equipment Search/Select (P17012S) Version

Specify the version of the Equipment Search/Select program (P17012S) that the system accesses from the work order search form.

Blank: ZJDE0001.

5. Related Purchase Orders (P134310E) Version

Specify the version of the Related Purchase Orders program (P134310E) that the system accesses from the work order search form.

Blank: ZJDE0001.

Viewing Work Order Detail Information

Work Order information includes basic data that defines the work order, such as the work order number, description, business unit to be charged, and dates to perform the work. You can view the information on work orders previously created, or you can create new equipment work orders.

To view additional information on the work order, click the link in the Work Order Description column on the View Work Orders form. You can review the information in the work order header and all attached text; the parts list and labor steps do not appear. Additionally, you can update a limited amount of information in the work order, such as status, priority, category codes, and text information.

To add a new equipment work order, click Add on the View Work Order form. When you create a work order, only the most basic information is required by the system, such as a description and business unit. You can use the remainder of the fields to classify and prioritize the work order. In addition, you can assign responsible people, such as a manager, supervisor, or others, to the work order. From this form, you cannot add the parts list or the labor steps that are used to complete the equipment work order.

> **Note:**
>
> - *Working with Work Orders*.
>
> - *Creating Work Orders for Unscheduled Maintenance*.
>
> - *Revising Work Orders*.
>
> - *Creating Model Work Orders*.

Setting Processing Options for the Work Order Detail Program (P17714E)

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

Defaults

Use these processing options to specify the default values.

1. Work Order Document Type

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Enter a value from UDC 00/DT (Document Type - All Documents) that specifies the default document type that the system uses when you enter a work order.

This code also indicates the origin of the transaction. The document type used here must be defined as an equipment work order document type in the Document Type Maintenance (P40040) program.

2. Work Order Type

Enter a value from UDC 00/TY (Work Order/ECO Type) that specifies the order type that the system uses when you enter a work order.

The order type indicates the type classification of a work order.

3. Work Order Priority

Enter a value from UDC 00/PR (Work Order Priority) that specifies the default work order priority that the system uses when you enter a work order.

This code indicates the priority of a work order in relation to other orders.

4. Manager

Specify the address book number of a manager or a planner. The system uses this value as the default when you enter a work order.

5. Supervisor

Specify the address book number of the supervisor that the system uses as a default value when you enter a work order.

6. Assigned To

Specify the address book number of a person to whom the system assigns the work when you enter a work order.

7. Responsible Business Unit

Specify the default responsible business unit that system uses when you enter a work order.

8. Branch

Specify the default branch that the system uses when you enter a work order.

9. Failure Description

Specify the information type that the system uses as a default value for the failure description when you enter a work order. Values are:

Blank: Do not supply a default value for the failure description.

1: Use the service type description for the default failure description.

2: Use the work order description for the default failure description.

Edits

Determine the information that the system requires.

1. Require Equipment Number

Specify whether the system requires you to enter an equipment number when you create a work order. Values are:

Blank: Do not require an equipment number.

1: Require the equipment number. If you do not enter an equipment number, the system generates an error and stops processing until you correct the error.

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Process

Use these processing options to specify how the system processes information.

1. Default Manager and Supervisor

Specify whether the system supplies default values for manager and supervisor fields on the work order. Values are:

Blank: The system does not supply default values for the manager and supervisor addresses.

1: The system uses default values for the manager and supervisor addresses, based on hierarchy:

Here's the order that the system uses:

   a. The values for the manager and supervisor from the processing options.
   b. The manager value from the equipment record.
   c. The values for the manager and supervisor from the Work Order Default Coding File table (F48001), based on category codes 1, 2, and 3 from the work order.

Note: For the Assigned To field, the system uses the value from the processing options first and information from the equipment record second.

2. Work Order Status Window

Specify whether the system automatically displays the Work Order Status form when you add a work order.

This option applies when you add a new work order. When you update an existing work order, the status window always appears, regardless of how this option is set. Values are:

Blank: Do not display the Work Order Status form when adding a work order.

1: Display the Work Order Status form when adding a work order.

3. Create Individual Resource Assignments

Specify a value to automatically create individual resource assignments based on the Assigned To (ANP) address book number on the work order

The system verifies the address book number using the Resource Master table (F48310). Values are:

Blank: Do not automatically create assignments.

1: Create assignments for Assigned To.

4. Work Order Approval Type

Enter a value from UDC 48/AP (Approval Type) that specifies the approval type that the system uses for the work order approval process.

The approval type indicates the type of approval path that a work order follows.

5. Work Order Cross Reference

Specify the work order cross-reference.

The system uses this information to determine the equipment number that is assigned to the Reference field on the work order. Values are:

Blank: Immediate parent of the equipment.

1: Top-level parent of the equipment.

6. Entitlement Checking

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Specify whether the system performs entitlement checking.

The system uses entitlement to retrieve response time and general ledger category codes. If this information is not found through entitlement, or if this processing option is turned off, the system retrieves those values from the Service Contract Services table (F1725) by service type. Values are:

Blank: Bypass entitlement checking.

1: Check entitlement.

7. Status Code to Remove Resource Assignments
Specify a user-defined code from the UDC table (00/SS) to automatically remove resource assignments associated with the work order when you change the status of the work order. For example, when you change the status of a work order to cancel, the resource assignments associated with it are removed.

If you leave this processing option blank, the system does not remove resource assignments associated with the work order.

Versions

Use these processing options to specify the version that the system uses when you select the associated program.

1. Equipment Work Order Print (R48425) Version
Specify the version of the Maintenance Work Order Report (R48425) program that the system uses to print maintenance work orders.

Blank: XJDE0001.

2. Failure Analysis Tree Search and Select (P17763S) Version
Specify the version of the Failure Analysis Tree Search and Select program (P17763S) that you access from the Work Order Revisions form.

Blank: ZJDE0001.

3. Failure Analysis Search and Select (P17768) Version
Specify the version of the Failure Analysis Search and Select program (P17768) that you access from the Work Order Revisions form.

Blank: ZJDE0001.

4. Equipment Search and Select (P17012S) Version
Specify the version of the Equipment Search/Select (P17012S) program that you access from the Work Order Revisions form.

Blank: ZJDE0001.

5. Resource Assignments (P48331E) Version
Specify the version of the Resource Assignments (P48331E) program that you access from the Work Order Revisions form.

Blank: ZJDE0001.

Categories

Use these processing options to specify the default values that the system uses when creating work orders.

1. Phase
Enter a value from UDC 00/W1 (Phase/System Codes) that the system uses as a default when you enter a work order.

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This category code 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.

2. Category Code 2

Enter a value from UDC 00/W2 (Work Order Category Code 2) that the system uses as a default when you enter a work order.

This category code indicates the type or category of a work order.

3. Category Code 3

Enter a value from UDC 00/W3 (Work Order Category Code 3) that the system uses as a default when you enter a work order.

This category code indicates the type or category of a work order.

Printing Work Orders

You can print work orders when you need a hard copy of a work order or group of work orders.

To print a work order, select the selected piece of equipment from the View Work Order form. You can print from the View Work Order form, or you can select the record and print from the Edit Work Order form. The printed work order displays the details of the work order, header information, and attached text information (if specified in the processing options).

> **Note:**
>
> - *JD Edwards EnterpriseOne Capital Asset Management Reports: Selected Work Order Reports*.

Viewing Resource Assignments

To plan the work order appropriately, you must be able to view the resources that have already been assigned to the work order.

To view the resources assigned to a particular work order, select the work order on the View Work Order form and click the link in the Resource Assignment column. Additionally, you can access the resource assignments view from the Edit Work Order form. You can view both the employees and equipment resources that are related to the equipment work order in the grid area of the form. The grid displays the resources, regardless of assignment level (either header or labor step detail). If no resources have been assigned to the work order, the system displays a message in the header stating that no resources were found.

> **Note:**
>
> - *"Assigning Resources to Work Orders" in the JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide* .

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Setting Processing Options for the Resource Assignments Program (P48331E)

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

Process

Use these processing options to specify how the system processes information.

1. Number of Periods

Specify the number of periods that the system uses to calculate availability and assigned workloads.

Periods are expressed as days or weeks, based on the value in the Period Type processing option. Enter a value within a range of 1 to 52.

Blank: 14.

2. Period Type

Enter a value from the UDC 48/PT (Period Type) that the system uses to group the display of assigned hours and capacity hours for a resource.

Blank: Days.

3. Supply/Demand Inclusion Rule

Enter a value from the UDC 40/RV (Inclusion Version) that the system uses to calculate availability.

For assignments at the work order level, the system determines if the assignment is included in availability calculations by using the rule in this processing option, the work order document type (DCTO), and the work order status (SRST). For assignments at the labor detail level, the system determines if the assignment is included in availability calculations by using the rule in this processing option, the work order document type, and the operation status (OPST).

Blank: The system calculates availability by using all assignments that have been identified for inclusion.

4. Calculate Totals

Specify whether the system calculates and displays the total lines for resource assignments. Values are:

Blank: Do not display total lines.

1: Display (calculate) total lines.

> **Note:** Enabling this option might cause performance degradation.

Viewing Related Purchase Orders

You often need to inquire on the status of a purchase order that is tied to an equipment work order.

To view a purchase order that is related to an equipment work order, click the link in the Related Purchase Order column on the View Work Order form. The system displays the details of the purchase order for view only; no changes to the purchase order are allowed. If no purchase order records are found, the system displays a message in the header.

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Setting Processing Options for the Related Purchase Orders Program (P134310E)

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

Defaults

Use this processing options to specify the default value that the system uses to search for purchase orders.

1. Order Type

Enter a value from UDC 00/DT (Document Type - All Documents) that specifies the document type for purchase orders.

The system uses this value when searching for purchase orders.

Display

Use these processing options to control the information that the system displays.

1. From Status Code

Enter a value from UDC 40/AT (Activity/Status Codes) that specifies the beginning code in the range of status codes that the system uses when searching for purchase order detail lines.

This processing option works in conjunction with the Status to Use processing option.

2. To Status Code

Enter a value from UDC 40/AT (Activity/Status Codes) that specifies the ending code in the range of status codes that the system uses when searching for purchase order detail lines.

This processing option works in conjunction with the Status to Use processing option.

3. Status to Use

Specify whether the system applies the From and To status range to the last status or the next status when searching for purchase order detail lines.

This processing option works in conjunction with the From Status Code and the To Status Code processing options. Values are:

Blank: The system applies the From and To status range to the Next Status code.

1: The system applies the From and To status range to the Last Status code.

4. Display Component Lines

Specify whether the system displays kit component lines or only the parent line. Values are:

Blank: The system displays only the parent line.

1: The system displays kit component lines.

5. Display Supplier Item Number

Specify whether the system displays the suppler cross-reference item number. Values are:

Blank: Do not display the supplier cross-reference item number.

1: Display the supplier cross-reference item number.

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Managing Cases

This section provides an overview of managing cases and discusses how to:

- View cases.
- Set processing options for the Work with Cases program (P17500E).
- Create and update cases.
- Set processing options for the Case Entry program (P17501E).

Understanding Managing Cases

Cases enable an organization to create a central point-of-contact for all maintenance issues. The Managing Cases entry point enables you to link to a variety of case information from one single form. This feature reduces the time that you spend calling and following up with the maintenance group.

The Manage Cases shortcut is a link to the Work with Cases program (P17500E). From this workspace, you can:

- View cases.
- Create and update cases.

Viewing Cases

You must be able to inquire and respond to a case quickly. To locate a case or a group of cases, you can use a variety of criteria. Here are some of the available fields that can be used to search for requests:

- Originator
- Equipment number
- Date
- Status

To search for a case, you use the Work with Case program (P17500E). Once the desired records are located, you can access other request information by using the links in the grid columns.

If you want to see detail information on the case and no detail exists, the system displays a message to inform you that no data exists for the selected case.

Mobile Application for Entering Cases

The following mobile application is available, and can be used to quickly enter cases on a mobile device:

- Quick Case Entry (Smartphone)
- Manage Cases (Smartphone)
- Review Cases (Tablet)

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This application require system administrator configuration before it is available to individual users. Contact your system administrator to determine whether this application is available for use.

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

- *Quick Case Entry Mobile Application*
- *Manage Cases Mobile Application*
- *Review Cases Mobile Application*

Setting Processing Options for the Work with Cases Program (P17500E)

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

Defaults

Use these processing options to specify default values for the system.

1. User ID
Specify whether the system enters the user as the default value in the Originator field.

The system displays cases that are originated by the user. Values are:

Blank: Do not enter the user as the default value in the Originator field.

1: Enter the user as the default value in the Originator field.

2. From Status Code
Enter a value from UDC 17/ST (Case Status) that specifies the from status.

The system displays only those cases that match the status specified in the processing options for the from status and to status.

3. To Status Code
Enter a value from UDC 17/ST (Case Status) that specifies the to status.

The system displays only those cases that match the status specified in the processing options for from status and to status.

4. Number of days to use for filter
Specify the number of days that the system uses to calculate the from date and to date.

The system displays cases only within this date range.

Blank: From/To Date are not populated.

Display

Control the information that the system displays.

1. Attachments
Specify whether the system displays attachments. Values are:

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Blank: Display attachments.

1: Do not display attachments.

Versions

Specify the version that the system uses when you select the associated program.

1. Case Entry (P17501E) Version
Specify the version of the Case Entry program (P17501E) that the system uses when you add a new case or select a specific request to review.

Blank: ZJDE0001.

Creating and Updating Cases

Case information includes basic data, such as equipment number, description, and the originator, that defines the issue. You can also provide additional information to help identify issues. You can view and update the information on cases previously created, or you can create new cases.

To view or update an existing case, click the link in the Failure Description column on the View Case Records form. The detail information for the selected maintenance appears. You can review the information or update the text information that is attached to the case.

To create a new case, click Add on the View Case Records form. When you create a case, only the basic information is required by the system.

Setting Processing Options for the Case Entry Program (P17501E)

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

Process

Use these processing options to specify how the system processes information.

1. Attachments
Specify whether the system displays attachments when you update case records. Values are:

Blank: Display attachments when you update records.

1: Do not display attachments when you update records.

Note: The system always displays attachments when you add case records.

Versions

Specify the version that the system uses when you select the associated program.

1. Case Master Business Function (P1700140) Version
Specify the version of the Case MBF (P1700140) that the system uses to process the data.

Blank: ZJDE0001.

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25 Billing for Equipment

Understanding Equipment Time Billing

You can charge a job or business unit for the use of equipment. When you enter equipment billing information, the system creates debit journal entries to the Account Ledger table (F0911). You can then review and approve billing entries for posting. When you post the entries, the system creates the offsetting credit entries to the general ledger Account Balances table (F0902). Equipment time billing transactions must also be posted to the Asset Account Balances table (F1202). Use JD Edwards EnterpriseOne Payroll or JD Edwards EnterpriseOne Time Accounting to bill for employee labor.

> **Note:** You can use the JD Edwards EnterpriseOne Time Accounting system without JD Edwards EnterpriseOne Payroll to bill for employee labor. However, you cannot use JD Edwards EnterpriseOne Payroll to bill for employee labor without the JD Edwards EnterpriseOne Time Accounting system.

> **Note:**
>
> - *"Posting Financial Transactions" in the   JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide   .*

Prerequisite

Before you complete the tasks in this section, set up the Equipment Rate table.

See *Setting Up Equipment Billing*.

Understanding Equipment Location Billing

Use location billing when you want to bill for equipment time based solely on the location of the equipment. When you bill for equipment by location, you do not have to enter additional billing information manually. The system creates location billings based on the location information that you enter as you relocate equipment. Billing for equipment by location is effective when you want to bill for small tools.

You can bill for equipment based on location when you want to:

- Create location billings based on any time period.
- Assign and bill quantities of the same equipment item at different rates among different locations.
- Specify multiple billing rate codes for a single piece of equipment.
- Set up rental rates for groups of equipment or individual pieces of equipment.
- Change the billing rate after a specified billing amount is reached.
- Rent or sell equipment to a job.

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If you sell the equipment to a job, the equipment can be purchased back at a percentage of the replacement cost.

You can set up the system to meet the location billing needs. Use category codes to organize equipment information. Set up rental rates and billing rates to specify any default values that you want the system to use when you enter information that requires billing data. This table indicates elements you can use to bill equipment by location:

Element	Description
Category code 10	You should reserve category code 10 to specify equipment billing rate groups for the individual pieces of equipment. You can use the equipment billing rate groups to combine similar equipment for billing.
Rental rules	Use rental rules to specify the default values, rate table limits, and so on for individual jobs. You also can specify the regular work hours in a workday and the workdays in a given month.
Billing rate tables	Use billing rate tables to set up and maintain billing rates for billing processes. For example, use billing rate tables to: • Define billing rates at specific levels. • Indicate billing frequency. • Establish a hierarchy between billing rates. • Establish rates for groups or single pieces of equipment. All rate tables have effective dates so that the billing is date-sensitive. For example, you can set up the same billing rate with different values that are based on dates.

Prerequisites

Verify that this information is set up:

- Valid rate codes
- Billing rate codes
- Rental Rates table
- Rental rules
- Account distribution rules

Entering Charges Using Equipment Time Entry

This section provides an overview of equipment time entry charges and discusses how to:

- Set processing options for the Equipment Time Entry program (P12110).
- Enter time billing information for equipment.
- Use a model time entry.
- Post time entries to the general ledger.
- Post general ledger entries to equipment.

Mobile Enterprise Applications for Field Progress Entry

The following mobile applications are available, and can be used to manage field progress entry on a mobile device:

- Mobile Field Progress Entry (Tablet)

- Mobile Field Progress Labor Entry (Smartphone)

- Mobile Field Progress Equipment Entry (Smartphone)

- Mobile Account Progress Entry (Smartphone)

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

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

Field Progress Entry Mobile Applications

Understanding Equipment Time Entry Charges

Use equipment time entry to charge equipment time directly to a job or business unit. Using equipment time entry, you can:

- Enter multiple pieces of equipment on the same form.

- Charge more than one job or account number on the same form.

- Override default billing rates.

- Use Time Entry Models to facilitate data entry.

Forms Used to Enter Time Billing Information

Form Name	FormID	Navigation	Usage
Work With Equipment Time Entries	W12110B	Equipment Time Billing (G1313), Equipment Time Entry.	Locate equipment time billing records.
Equipment Time Entry	W12110C	Click Add on the Work With Equipment Time Entries form. Select a record on the Work With Equipment Time Entries form, and click Copy.	• Enter equipment time billing information. • Use a model time entry record to create new equipment time billing information.

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Setting Processing Options for the Equipment Time Entry Program (P12110)

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

Display

1. Display Assets

Specify which assets that the system displays when using a model. Values are:

Blank: Display all assets when using a model.

1: Display parent assets when using a model.

Edits

1. Location Warning

Specify whether the system issues a warning when time is charged to a location other than the asset's current location. Values are:

Blank: Do not issue a warning.

1: Issue a warning.

Versions

1. Accounts (P0901) Version

Specify the version of the Accounts program (P0901) that the system uses.

Blank: ZJDE0001.

2. Job Cost Master (P51006) Version

Specify the version of the Job Cost Master program (P51006) that the system uses.

Blank: ZJDE0002.

3. Budget Original (P510121) Version

Specify the version of the Budget Original program (P510121) that the system uses.

Blank: ZJDE0003.

Entering Time Billing Information for Equipment

When you enter equipment time, the system creates debit entries to update the Account Ledger table. When you post the entries to the Account Ledger table, the system creates the offsetting credit entries in the Account Balances table. You must then post the entries to the Asset Account Balances table.

Access the Equipment Time Entry form.

1. Complete these fields:
    - Business Unit

- G/L Date (general ledger date)
- Date Worked

2. Complete these fields for each piece of equipment requiring time entries, and click OK:

- Equipment Number
- Rate Code
- Billing Rate
- Units/Hours

Using a Model Time Entry

You can save time and reduce the possibility for error by using a model time entry to create a new billing batch. A model time entry is based on any posted time entry batch. A model time entry is especially useful if you charge for equipment on a regular basis and can use the time entry batch from the prior period as a model.

Ensure that you have posted at least one time entry to the general ledger.

Access the Work With Equipment Time Entries form.

1. Complete any of these fields, and click Find to locate a time entry on which you want to base the model:

- Batch Number
- Batch Type

2. Select the batch that you want to copy and click Copy.
3. On the Equipment Time Entry form, make any changes necessary to the record and then click OK.

> **Note:** FMJE automatic accounting instructions (AAIs) are used to exclude accounts that you do not want to see when the model is used. For example, typically the credit entries on a posted batch would be filtered out to display only the debit entries.

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See *Understanding AAIs for Equipment/Plant Maintenance and Equipment Billing*.

Posting Time Entries to the General Ledger

Select Equipment Time Billing (G1313), Post Time Entries to G/L.

You must post time entries to update the general ledger and equipment balances. Post the entries to the general ledger first. When you select Post Time Entries to G/L, the system displays Work With Batch Versions - Available Versions. You can select the appropriate version from the Work With Batch Versions - Available Versions form.

When you run the post program to post journal entries to the general ledger, the system automatically creates the Posting Edit report. This standard report indicates which batches posted successfully. An error message prints when a batch does not post.

Posting General Ledger Entries to Equipment

Select Posting G/L to Fixed Assets (G1212), Post G/L Entries to Fixed Assets.

After you post journal entries for equipment time to the general ledger, you must post them to the Asset Account Balances table. When you post journal entries for equipment time to the Asset Account Balances table, the system verifies that each of the batch transactions includes:

- A general ledger post code of *P,* which indicates that the transaction has been posted to the G/L Account Balances table.
- An account that falls within the cost account range set up in the AAIs.
- A fixed asset post code of blank, which indicates the eligibility to post to the Asset Account Balances table.
- A valid equipment number.
- A hold code of blank.

When you select Post G/L Entries to Fixed Assets, the system displays the Work With Batch Versions - Available Versions form. You can select the appropriate version from the Work With Batch Versions - Available Versions form. The post program updates the Asset Account Balances table and marks each transaction as posted.

You determine which accounts post to equipment when you set up AAIs FX01–FX98. Only the accounts within the FX01–FX98 range appear on the posted transaction ledger report. The Unposted F/A report version includes all time entry transactions, regardless of the affected accounts.

Processing Location Billings

This section provides an overview of the location billing process and discusses how to:

- Set processing options for the Location Billings program (R1304).
- Create location billings.
- Review a location billing.
- Approve a location billing batch.

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- Set processing options for the Batch Type program (P0011).

- Post location billings.

- Revise location billings.

Understanding the Location Billing Process

After you set up location billing and enter location information for equipment, you can create a location billing. The system automatically creates journal entries to distribute revenues and expenses to the appropriate accounts. The system creates billing journal entries based on the location billing setup and the location information for the equipment that is dated from the last bill date through the bill to date that you specify for the billing. This diagram illustrates the process flow:
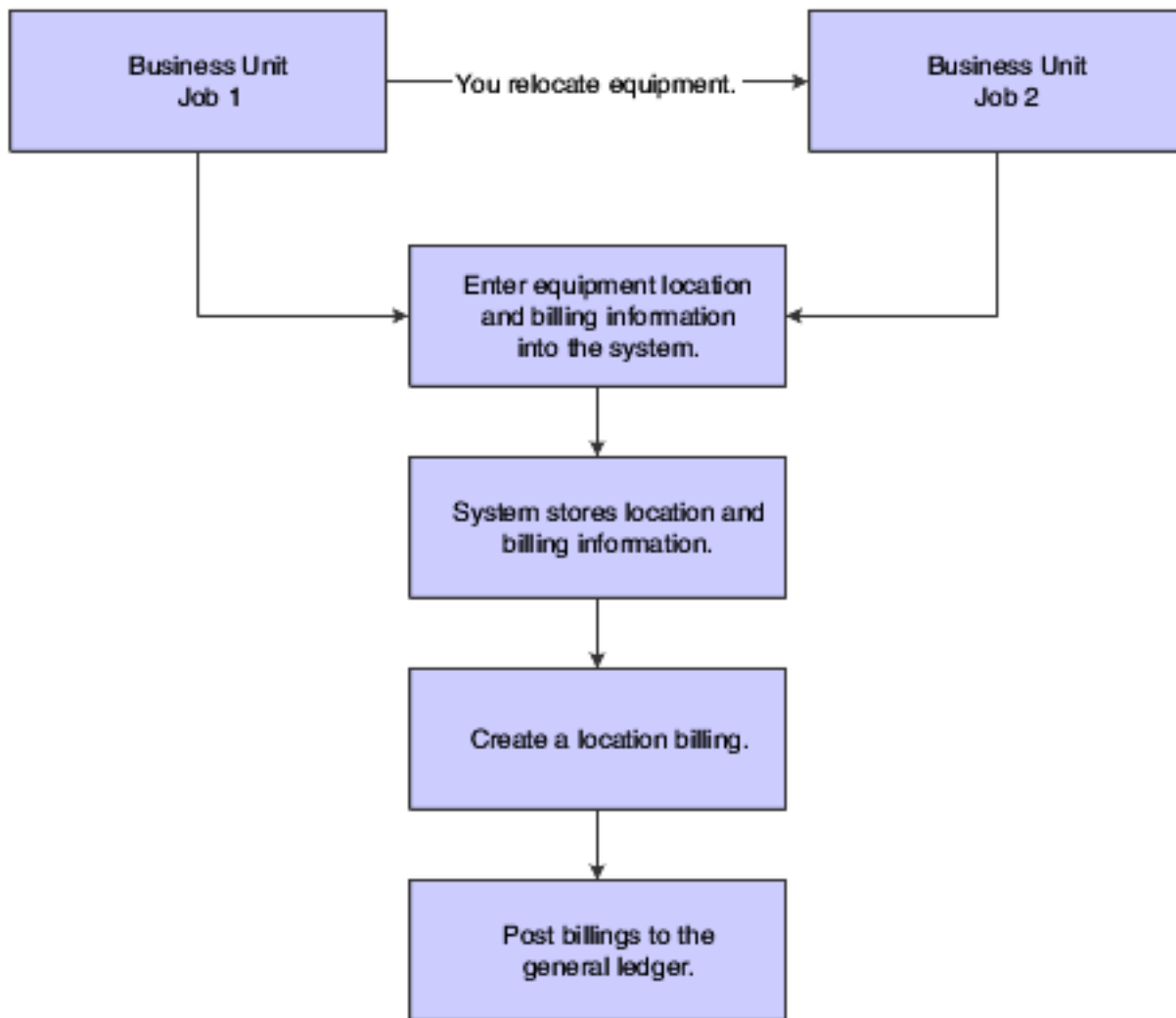
Note: You do not have to relocate equipment to bill by location. You can create as many billings as you want for a piece of equipment based on the initial location that you enter on the equipment master.

After you create location billings, you must process the billing information to update the general ledger and equipment balances.

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Forms Used to Process Location Billings

Form Name	FormID	Navigation	Usage
Location Billing Inquiry	W13200A	Equipment Location Billing (G1321), Location Billing Inquiry.	Review billing information before posting to the general ledger.
Work With Batches	W0011A	Equipment Location Billing (G1321), General Journal Review.	Review the general journal batches. Post the billing batches to the general ledger. When you post to the general ledger, the system updates the Account Balances table and creates the credit side of the billing. Select a batch and then click Post by Batch from the Row menu.
General Journal Review	W0911BA	Locate the batch on the Work With Batches form, and then click Select.	Review the individual journal entries.
Batch Approval	W0011C	Locate the batch on the Work With Batches form, and then select Approve from the Row menu.	Approve billing batches before you post them to the general ledger.
Voucher Entry Journal Review	W0411BA	Locate the batch on the Work With Batches form, and then click Select.	Delete unposted location billing batches. When you delete a location billing batch, you delete both the Account Ledger transaction in the general ledger and the Equipment Billing Transaction table.

Setting Processing Options for the Location Billings Program (R1304)

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

Date Selection

1. Thru Date

Specify the through date that the system uses for billing calculations.

Blank: System Date.

2. G/L Date (general ledger date)

Specify the general ledger date that the system uses when posting billings.

Blank: Thru Date.

Partial Hour

1. Partial Hours

Specify the increments in which the system bills partial hours. Values are:

Blank: Bill in hour increments.

1: Bill in quarter-hour increments.

Update Option

1. Proof or Final Mode

Specify the mode that the system uses when updating tables.

When you specify proof mode, the system prints a report that lists all selected records, as well as a message that indicates whether they are processed. The system does not update any tables in proof mode. When you specify final mode, the system updates the tables. Values are:

Blank: Proof mode.

1: Final mode.

Creating Location Billings

Select Equipment Location Billing (G1321), Location Billings.

Run the Location Billings program to bill locations for equipment use. The Location Billings program is a batch program in which you use data selections to indicate what location tracking information you want to include in the billing. The system accesses the location information that matches the selection criteria and creates the appropriate debit and credit transactions.

The Location Billings program creates debit journal entries that affect the appropriate jobs or business units for the use of equipment based on the location information stored in the Location Tracking Table (F1204). The General Ledger Post program creates the credit side of the journal entry using the AAIs that define rate components.

You can review and approve the batch transactions on the Billing Journal Review form to verify equipment location information before posting the new billing information.

Verifying the Location Billing

When you run a version of the Location Billings program, the system prints a location billing register that displays:

- All equipment billed and the amount.

- An explanation for all locations for which the system could not process the billing.

Running the Proof or Final Version

You can run the proof version of the Location Billings program to verify that the billing and location information that you entered for the equipment is correct. When you run the proof version, the program prints the location billing report without creating journal entries or updating equipment information. The system does not assign batch numbers to billings that you create using the proof version. When you run the final version, the program updates equipment information and creates a batch of journal entries that you must post to the general ledger and equipment balances.

Excluding Non-Billable Location Information

You can use data selection to exclude location tracking information that you do not want to bill. If you do not exclude location tracking information on the system before you create a location billing, the information appears on the billing register as *Not able to be billed.* Possible selections that you can use to exclude billing information are:

- A beginning date after the date that the Location Billing program was installed.

- Billing rate codes not equal to blank.

Reviewing a Location Billing

Access the Location Billing Inquiry form.

To review location billing:

1. Complete any of these fields and click Find to locate a billing batch:

    o Location
    o Batch Number
    o User ID
    o As of
    o Unposted (Y/N)

2. To review a location, select the location and then select Transfers from the Row menu.

     ○ **As of**

       Enter the date of the current billing.

     ○ **Unposted (Y/N)**

       Enter a code that specifies how to display unposted transactions. Values are:

       Y: Include unposted transactions.

       N: Do not include unposted transactions.

       U: Display only unposted transactions.

Approving a Location Billing Batch

If the system is set up to require batch approval, you must approve billing batches before the system can post them. You can approve the location billings by batch or review each transaction individually. If you review a batch and find it in error, you can prevent it from posting by changing the status of the batch from approved to pending.

Access the Work With Batches form.

To approve a location billing batch:

1. Display all batches for all users or limit the search by completing one or more of these fields:

     ○ Batch Number

     ○ Batch Type

2. To review only posted or unposted batches, select one of these batch status options:

     ○ Unposted Batches

     ○ Posted Batches

3. To limit the search further, complete one or more of these fields and click Find:

     ○ Batch Date

     ○ Batch Status

     ○ User ID

4. Select a row and select Batch Approval from the Row menu.
5. On the Batch Approval form, click the Approved option and click OK.

6. To verify the approval, review the Status Description field on the Work With Batches form.

To prevent an approved batch from posting, change its status to pending.

    ◦ **Batch Type**

Enter a value from user-defined code (UDC) table 98/IT (Batch Types) that specifies the system and type of transactions entered in a batch.

The system assigns the value when you enter a transaction. You cannot assign new values. All batch types are hard coded.

To limit the search to specific transactions, such as **G** for general accounting entries or **V** for accounts payable vouchers, enter the transaction batch type in this field. If you want to see a specific batch, you must enter both the batch number and type.

    ◦ **Batch Date**

Enter the date of the batch.

Blank: The system date is used.

    ◦ **Batch Status**

Enter a value from UDC 98/IC (Batch Status) that indicates the posting status of a batch. Values are:

Blank: Unposted batches that are pending approval or have a status of approved.

A: Approved for posting. The batch has no errors, and is in balance, but has not yet been posted.

D: Posted. The batch posted successfully.

E: Error. The batch is in error. You must correct the batch before it can post.

P: Posting. The system is in the process of posting the batch to the general ledger. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to **E** (error).

U: In use. The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

If appropriate, select one of these options to display records by batch status:

- Unposted Batches
- Posted Batches
- All Batches

Setting Processing Options for the Batch Type Program (P0011)

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

Batch Type
1. Batch Type
Specify the batch type to use as the default value on the Work With Batches form.

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Posting Location Billings

Access the Work With Batches form.

You must post billings to the general ledger and equipment balances.

After you post the location billings to the general ledger, you must then post them to equipment. When you post the billings to equipment, the system updates the Asset Account Balances table. You can post the billings to equipment, or you can set up the system to post the billings to equipment when you run the post to the general ledger.

Revising Location Billings

Access the Voucher Entry Journal Review form.

If you find an error in the location billing information, you can revise the billing to correct the error.

You cannot revise unposted billings created in location billing. To change location billing information before you post the billing to the general ledger, you must delete the billing and recreate it.

You can delete unposted location billing batches only on the Equipment Time Entry form. On the Equipment Time Entry form, enter the number of the location billing batch that you want to delete. When you delete a location billing batch, you delete both the Account Ledger transaction in the general ledger and the Equipment Billing Transaction table.

To revise location billings:

1. On the Voucher Entry Journal Review form, select a document to review and click Select.

   To delete an unposted journal entry, select the journal entry and click Delete.

   The Amount field appears blank on the Voucher Entry Journal Review form if the journal entries are in balance.
2. On the Enter Voucher - Payment Information form, enter any necessary changes and click OK.

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26 Running the Capital Asset Management Global Updates

Understanding CAM Global Updates

Use global update programs to make system-wide changes that affect a variety of information within JD Edwards EnterpriseOne CAM. For example, you can:

- Update asset locations from a planned location to a current location.
- Recalculate work order costs to reflect actual time that is spent on each maintenance task.
- Create preventive maintenance schedules for groups of similar equipment.
- Make additions or changes to groups of related preventive maintenance schedules, such as:
    - Schedule dates
    - Service intervals
    - Priorities
- Update equipment tables when you revise numbers in the chart of accounts.
- Update the Account Ledger table (F0911) when you change the symbol that you use to identify equipment numbers.

> **Note:**
>
> - *"Updating Phase and Equipment Numbers" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

Updating Equipment Numbers

If you change the unit number or serial number for a piece of equipment, the system updates only the Equipment Master in the Asset Master File table (F1201). The system does not automatically update other tables that store equipment numbers. Therefore, you must run the Update Unit/Serial # from F1201 program (R12804) to update the numbers in these tables:

- Maintenance Schedule File (F1207).
- Meter Reading Estimates (F1306).
- Maintenance Rules (F1393).
- Work Order Master File (F4801).

When you update equipment numbers, the system submits the job directly to a batch update process.

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Ensure that you have backed up any of the tables that you plan to update. Also, verify that no one accesses the equipment tables while you run this program. The program is unable to update records that are locked by other system applications. Any equipment information that a user accesses elsewhere in the system is not affected by the update.

Select Advanced Operations (G1331), Update Unit/Serial # from F1201.

Updating Asset Information

You can update certain asset information globally to reduce the amount of processing time that is needed to maintain the fixed assets information throughout the organization.

> **Note:**
>
> - *"Updating Asset Information" in the   JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide .*

Updating Meter Schedules Flag

The Allow Meter Schedule option enables you to define preventive maintenance schedules (PM) using meter intervals. The system will then process meter calculations when updating the PM status.

You can update the Allow Meter Schedule option globally to reduce the amount of time required to update the equipment records manually. You run the Update Allow Meter Schedule program (R131217) to update selected equipment records in the Equipment Master Extension table (F1217). The system checks for the current PM Schedules on the equipment and determines if there are any meter intervals defined. If meter intervals are defined, the Allow Meter Schedules option shall be set on the equipment master.

You can also select the Allow Meter Schedule option manually when creating the equipment record or populate the field by setting the appropriate processing option for the Equipment Master Revisions program (P1702).

Select Advanced Operations (G1331), Update Allow Meter Schedules Flag.

Updating Work Order Information

You can update certain work order information globally to reduce the amount of processing time that is needed to maintain current information throughout the organization. This section discusses how to:

- Update work order actual amounts.
- Update work order status based on purchase order receipt.
- Set processing options for the Update WO Status Based on PO Receipt program (R48810).
- Update the standard parts list.
- Set processing options for the Standard Parts List Update program (R13802).

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Updating Work Order Actual Amounts

Select Advanced Operations (G1331), Update WO Actual Amounts.

Run the Update Work Order Actual Amounts program (R13800) to replace the actual hours in the Work Order Routing table (F3112) with the total hours for each operation sequence from the Employee Transaction History table (F0618). The program also reads the Account Ledger table (F0911) for material and subcontract amounts. The program then updates this information in the Work Order Master File table (F4801):

- Actual labor costs
- Actual material costs
- Actual hours
- Actual amount
- Actual other costs

Updating Work Order Status Based on Purchase Order Receipt

Select Advanced Operations (G1331), Update WO Status/PO Receipt.

You can update the status of work orders based on whether parts ordered from associated purchase orders have been received. This action is especially useful when scheduling work orders based on the arrival of ordered parts. You can specify the status at which the system updates work orders based on both partial and full receipt of the items on the associated purchase order. You can also specify the recipient of an email message informing that person of the change in work order status.

Setting Processing Options for the Update WO Status Based on PO Receipt Program (R48810)

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

PO Receipt Status

1. Purchase Order Receipt Status

Specify the purchase order status which the system indicates that the purchase order has been received.

The system checks for a status that is greater than or equal to the status that you specify in this processing option.

WO Status

1. Full Receipt Status

Specify the status to which the system updates a work order when all parts have been received.

Blank: Do not update work order status.

2. Partial Receipt Status

Specify the status to which the system updates a work order when some of the parts have been received.

Blank: Do not update work order status.

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E-Mail Address

1. Message Recipient

Specify the address book record (on the work order) to which the system sends email regarding a change in work order status. Values are:

1: Originator (ANO)

2: Assigned To (ANP)

3: Supervisor (ANPA)

4: Manager (ANSA)

5: Customer (AN8)

Updating the Standard Parts List

Select Advanced Operations (G1331), Standard Parts List Update.

When you change a work order parts list that is based on a standard parts list, you can update the Bill of Material Master File table (F3002) to ensure that all future work orders that use the same standard parts list contains the revised information.

When you add a part to a work order parts list, the Standard Parts List Update program adds the part to the standard parts list. When you change the quantity of a part on the work order parts list, the program updates the quantity on the work order parts list. The system compares the transaction quantity on the work order part to the quantity that is indicated on the standard parts lists when it updates the standard parts list.

You can also use the Standard Parts List Update program to update the equipment parts list. The update program works in the same way as the standard parts list, except that it updates the standard parts list from the Asset Master File table (F1201) as well as the standard parts list from the Work Order Master File table (F4801).

Setting Processing Options for the Standard Parts List Update Program (R13802)

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

Update

1. Proof or Final Mode

Specify whether the system runs the program in proof mode or final mode.

In proof mode, the system generates a report, but does not update the standard parts list. In final mode, the system generates a report and updates the standard parts list. Values are:

Blank: Proof mode

1: Final mode

2. Standard Parts List Required Quantity

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Update the value of the required quantity on the standard parts list when the transaction quantity is zero. Values are:

Blank: Use a zero quantity.

1: Use the original quantity.

3. Equipment Standard Parts List

Specify whether the system updates the standard parts list for only the work order or for the work order and the piece of equipment on the work order. Values are:

Blank: Update the standard parts list for only the work order.

1: Update the standard parts lists for both the work order and the equipment.

Updating Preventive Maintenance Schedule Information

This section discusses how to:

- Update preventative maintenance (PM) schedules globally.
- Create PM schedules for multiple pieces of equipment.

You can update PM schedule information to make global changes to PM services types and create PM schedules for multiple pieces of similar equipment.

> **Note:**
>
> - *"Updating Company Numbers and Accounts" in the   JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide   .*
>
> - *"Running the Repost Ledger Program" in the   JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide   .*
>
> - *"Updating the Asset Number in the Account Ledger" in the   JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide   .*

Forms Used to Update and Create PM Schedules

Form Name	FormID	Navigation	Usage
Work with Global PM Schedule	W13075A	For Capital Asset Management: Advanced Operations (G1331), Global PM Schedule Update For Condition-Based Maintenance: Advanced & Technical Operations (G13CBM31), Global PM Schedule Update	Locate the equipment that you want to update. Add a schedule and specify the class of equipment for which you want the service type to apply. Before completing an update, you can review

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Form Name	FormID	Navigation	Usage
			all of the equipment that would be updated by entering a service type and leaving the category code fields blank. To review all of the service types that apply to a particular class of equipment, complete the category code fields and leave the Service Type field blank.
Global PM Schedule	W13075B	Select Revision from the Form menu on the Work with Global PM Schedule form. Click Add on the Work with Global PM Schedule form.	Update schedule types, service interval information, and PM generation and planning information. Enter schedule types, service interval information, and PM generation and planning information.

Updating PM Schedules Globally

You can globally add, change, or delete PM schedules. You specify the service type that you want to change and enter information about the equipment for which you want the changes to apply.

You can also make global revisions to a group of PM service types. You narrow the list of equipment for which you want the revisions to apply by using any combination of the first ten equipment category codes. For example, for any service type, you can:

- Change the service interval.
- Revise the schedule date.
- Revise the maintenance priority.
- Revise the procedure number.
- Assign a different model work order number.
- Revise the value in the Occurrences field.
- Revise the frequency indicator.
- Revise the multiple work order code.

You also can create PM schedules for multiple pieces of equipment with similar maintenance requirements that you place in service.

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The Global PM Schedule Update program immediately updates the Maintenance Schedule File table (F1207), depending on the information that you change. Consider these guidelines when you update PM schedule information:

- If you enter a schedule date, the system removes all other meter service intervals.

- If you enter a meter service interval, the system removes the schedule date.

- If you enter a schedule date and a frequency indicator, the system removes any existing service days.

- If you enter a schedule date and service days, the system removes the existing frequency indicator.

Creating PM Schedules for Multiple Pieces of Equipment

You can create PM schedules for multiple pieces of equipment. This feature is particularly useful when you initially set up the system or when you add multiple pieces of identical equipment to the operation. You create PM schedules for multiple pieces of equipment by assigning a service type to equipment that matches specific selection criteria on Work with Global PM Schedule. You use the first ten equipment category codes to select the equipment for which the PM schedule applies.

Note: When you create PM schedules for multiple pieces of equipment, the system updates the PM schedules for all of the equipment that matches the equipment category codes which you specify. If you are uncertain whether the process affects equipment for which you previously created PM schedules and you do not want the new PM information to apply, you should not use Work with Global PM Schedule to create the PM schedules. Instead, create individual PM schedules using Equipment PM Schedule.

Adding Extension Records

Certain JD Edwards EnterpriseOne CAM programs require additional tables. To use these programs, you must complete the tasks-one time only-to add extension records. You must add extension records for the equipment master before you add them for work orders. This section discusses how to:

- Add equipment master extension records.

- Add work order extension records.

Note: If you currently use JD Edwards EnterpriseOne Plant and Equipment Management and are upgrading to JD Edwards EnterpriseOne CAM, or you have fixed asset records that you want to manage through JD Edwards EnterpriseOne CAM, you must complete the tasks in this topic.

Adding Equipment Master Extension Records

Select Advanced Operations (G1331), Equipment Extension Batch Update.

For JD Edwards EnterpriseOne CAM, the Equipment Master Revisions program (P1702) requires both the Asset Master File table (F1201) and the Equipment Master Extension table (F1217). Therefore, you must run a new batch process to add equipment master extension records.

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Use data selection to select equipment that corresponds with the defaults that are defined in the processing options and then run the version. The program creates a record in table F1217, which enables you to use the equipment master program.

Adding Work Order Extension Records

Select Advanced Operations (G1331), Work Order Tag File Batch Update.

For JD Edwards EnterpriseOne CAM, the Work Order Revisions program (P17714) requires both the Work Order Master File table (F4801) and the Work Order Master Tag File table (F4801T). Therefore, you must run a new batch process to add work order extension records.

Note: Do not run this batch process unless you have first added the equipment master extension records.

Use data selection to select only the appropriate work orders, and then run the version. The program creates a record in table F4801T, which enables you to use the Work Order Revisions program. If parts or routings are attached to the selected work orders, the program also creates the Parts Extension table (F31171) and the Routing Instruction - Extension table (F31172) for these work orders.

Running Conversion Programs

The system previously identified preventive maintenance schedules that did not have service intervals as unscheduled maintenance.

The system requires a value in the Schedule Type field (PDFG) in the Maintenance Schedule File table (F1207) and the Equipment PM Schedule (Model) table (F12071) to identify the type of maintenance. Therefore, you must run two new batch programs, Update PDFG in F1207 for 8.10 (R891207B) and Update PDFG in F12071 for 8.10 (R8912071B), to update the Schedule Type field for existing preventive maintenance schedules that do not have service intervals. The batch programs update the Schedule Type records in tables F1207 and F12071 with a value of **1** (unscheduled maintenance).

After you run the batch program, verify that the Schedule Type field is set to a value of **1** for all PM schedules in tables F1207 and F12071 that are not set up as condition-based (Schedule Type value of **2**) or that do not have service intervals (such as hours, miles, fuel, days, or scheduled date).

This section discusses how to:

- Run the Update PDFG in F1207 for 8.10 program (R891207B).
- Run the Update PDFG in F12071 for 8.10 program (R8912071B).

Note: You can run the update programs multiple times with no adverse affects; but typically, you should only need to run them once.

If you currently use Plant Management and are upgrading to CAM, or you have fixed asset records that you want to manage through CAM, you must complete the tasks in this topic.

Running the Update PDFG in F1207 for 8.10 Program (R891207B)

Select Update PDFG in F1207 for 8.10 from the Convert 8.9 to 8.11 menu (GH9619A2).

Running the Update PDFG in F12071 for 8.10 Program (R8912071B)

Select Update PDFG in F12071 for 8.10 from the Convert 8.9 to 8.11 menu (GH9619A2).

Purging Closed Work Orders

This section discusses how to purge closed work orders.

Select Shop Floor Management Advanced (G3131), Purge Orders.

You can increase the processing speed of the system and create more storage space for current data by deleting old or inaccurate information from the system. When you use the purge programs in JD Edwards EnterpriseOne CAM, you can purge entire tables or specific data within tables. You can also archive the information that you purge.

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

The Work Order Purge program (R4801P) deletes the work order records that you specify, including any associated record types and approval records. The program does not create a purge table or a report.

When you run the Work Order Purge program, you use data selection to specify which work orders to purge from the Work Order Master File table (F4801). In addition, the system purges related information from these tables for the work orders that you select:

- Work Order Instructions File (F4802).
- Work Order Parts List (F3111).
- Work Order Routing (F3112).
- Work Order Time Transactions (F31122).

    The system purges only the records that are not used by CAM.

You can use a processing option to save purged work order information in a special purge library.

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27 Appendix A - Capital Asset Management Reports

JD Edwards EnterpriseOne Capital Asset Management Reports

JD Edwards EnterpriseOne CAM provides a variety of reports to help you review and manage information about the equipment and its maintenance.

You print cost reports to review financial information about the equipment. Cost reports provide this information:

- Equipment account balances, such as acquisition costs, revenue amounts, expense amounts, and so on.
- Variances between revenue and expenses for a piece of equipment.
- All equipment transactions.

You print work order reports to review information about maintenance work orders. Work order reports provide this information:

- Work order status.
- Detailed or summarized work order costs.
- Variances between projected and actual work order costs.
- All work orders that are associated with a particular piece of equipment.
- Work order parts information by equipment number.

You print maintenance planning reports to review information about the planning processes. Maintenance planning reports provide information about projected parts requirements and projected labor resource requirements.

You print preventive maintenance (PM) reports to review information such as:

- Status of service types for a piece of equipment.
- Maintenance messages.
- The frequency of occurrence for selected service types.

> **Note:**
>
> - *"JD Edwards EnterpriseOne Financial Management Application Fundamentals Preface" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .
>
> - *"R12420 - F/A Transaction Ledger Report" in the JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
>
> - *"R48497 - Print Cost Summary Reports" in the JD Edwards EnterpriseOne Applications Work Orders Implementation Guide* .

JD Edwards EnterpriseOne Capital Asset Management Reports: A to Z

This section lists JD Edwards EnterpriseOne CAM reports, grouped in these categories:

- Equipment reports
- Cost reports
- Work order reports
- Maintenance planning reports
- Labor planning reports
- Preventive maintenance reports

Equipment Reports

Print an equipment report to review and manage information such as supplemental data, specification data, location history, and so on.

This table lists equipment reports sorted alphanumerically by report Identification Number (ID):

Report ID and Report Name	Description	Navigation
R12400 Supplemental Data by Asset	This report lists additional information by supplemental data type that you assigned to individual pieces of equipment. For example, you can print a report that displays all of the supplemental data types that are assigned to a particular motor grader.	Supplemental Data (G1318), Print Supplemental Data by Asset
R12440 Supplemental Data by Type	This report lists additional equipment information that is based on a particular supplemental data type. For example, you set up a supplemental data type for vibration readings. You can print a report that displays vibration readings for all of the pieces of equipment for which you have assigned the supplemental data types for vibration readings.	Supplemental Data (G1318), Print Supplemental Data by Type
R12460 Location Information	This report lists equipment movement and relocations. Depending on the version that you run, the report displays information by asset number or by location.	Equipment Location Tracking (G1314), Print Location Information
R17022 Customer Reference Report	This report lists all of the equipment that you have installed at a customer's site or sites. In addition, the report provides mailing support for manufacturers in	Daily Equipment Master Processing (G1711), Customer Reference Report

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Report ID and Report Name	Description	Navigation
	the event of product recalls or retrofit campaigns. You use data selections such as state, model, and user-defined codes (UDCs) to specify the information that you want to retrieve and print. The system draws information for this report from these tables: • Asset Master File (F1201) • Equipment Master Extension (F1217) • Address Book Master (F0101)	

Cost Reports

Print cost reports to review and analyze equipment costs and transactions, such as equipment account balances and variances between costs and revenues. You can also use 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 in completing a work order.

This table lists cost reports sorted alphanumerically by report ID:

Report ID and Report Name	Description	Navigation
R12310 Time Entry Journal	This report lists transactions that result from equipment time entries.	Equipment Time Billing (G1313), Time Entry Journal Report
R12424 Equipment Cost Analysis	This report account balances for specific pieces of equipment. The report displays acquisition costs, depreciation amounts, revenue and expense amounts, and so on, for the equipment that you specify. You can analyze these amounts in month-to-date, year-to-date, or inception-to-date increments.	Cost Inquiries and Reports (G1312), Print Equipment Cost Analysis
R12426 Equipment Billing Rates	This report lists the billing rates that are established for specific pieces of equipment or groups of equipment.	Equipment Billing Setup (G1343), Equipment Billing Rates
R13400 Equipment Variance	This report lists the total revenues and expenses generated by a piece of equipment, as well as the variance between revenue and expenses.	Cost Inquiries and Reports (G1312), Equipment Variance Report

Work Order Reports

JD Edwards EnterpriseOne CAM provides you with a variety of reports to help you review and manage information about work orders. Work order reports can provide:

- Standard work order information, such as work order status and work order costs.

  You can print standard work order reports to track the progress of work orders by status for a particular date. You can also review the costs that are associated with selected work orders. In addition, you can print detailed reports about supplemental data for the work orders.

- Work order information for specific pieces of equipment, such as work orders associated with a particular equipment malfunction or total work orders completed for a piece of equipment.

- Budget information, such as a comparison of estimated and actual work order costs.

- Parts information, such as parts requirements and parts availability for outstanding work orders.

This table lists work order reports sorted alphanumerically by report ID:

Report ID and Report Name	Description	Navigation
R13410 Equipment Parts List	This report lists parts information that is associated with individual pieces of equipment. The report lists both the location and availability of parts.	System Administration Tools (GH9011), Batch Versions You can only access this report by using this procedure: Type R13410 in the Batch Application field on the Work With Batch Versions - Available Versions form and then click Find. A list of available versions appears in the detail area. Select the version that you want to run and click Select.
R13415 Work Order Parts List	This report lists parts information that is associated with work orders.	Work Order (G1316), Print Work Order Parts List
R13418 Budget to Actual Report	This report lists work order information for specific pieces of equipment.	Cost Inquiries and Reports (G1312), Budget to Actual Report
R13420 Equipment History Report	This report lists this information for equipment and equipment components: - Work orders that are associated with each piece of equipment. - Problems and possible causes.	Cost Inquiries and Reports (G1312), Equipment History Report

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Report ID and Report Name	Description	Navigation
	• Actions that were taken to solve the problems.	
R13430 Work Order Completion Report	This report lists work orders by individual pieces of equipment.	Cost Inquiries and Reports (G1312), Work Order Completion Report
R13440 Labor Utilization	This report lists work orders that were created for a piece of equipment and the hours that are associated with each labor routing step, such as Electrical, Mechanical, and so on. The report also displays the total hours that are associated with each work order.	Cost Inquiries and Reports (G1312), Print Labor Utilization
R13450 Parts Forecast Report	This report lists parts and work orders by branch.	Cost Inquiries and Reports (G1312), Print Parts Forecast

Maintenance Planning Reports

You can print maintenance planning reports to review and manage information about future parts and labor resource requirements.

This table lists maintenance planning reports sorted alphanumerically by report ID:

Report ID and Report Name	Description	Navigation
R13412 PM Projections Report	This report lists information about forecasted preventive maintenance (PM).	Maintenance Planning (G1322), Print PM Projections
R3450 Master Production Schedule	This report provides a projection of inventory availability for individual maintenance items. You can also print outstanding planning messages.	Material Planning (G1323), Print Schedule & Messages

Labor Planning Reports

Print labor planning reports to review and manage detailed information about future requirements for labor resources.

This table lists labor planning reports sorted alphanumerically by report ID:

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Report ID and Report Name	Description	Navigation
R3350 Capacity Requirements and Messages	This report includes time series information for a work center, outstanding action messages for a work center, or both. You can print the information for all work centers or for selected work centers.	Labor Planning (G1324), Print Load & Detail Messages
R3352 Period Summary Report	This report lists all of the items that are scheduled at the work centers during the period of time which you specify. It also lists the number of resource units that are required to complete each work order, and the percent additional or less than the total load on the work center).	Labor Planning (G1324), Print Period Summary

Preventive Maintenance Reports

You can print preventive maintenance (PM) reports to review and manage information about preventive maintenance schedules and service types within the maintenance organization.

This table lists preventive maintenance reports sorted alphanumerically by report ID:

Report ID and Report Name	Description	Navigation
R12407 Maintenance Schedule	This report enables you to review the status of preventive maintenance for equipment.	Plant & Equipment Maintenance (G1315), Print Maintenance Schedule
R12450 Equipment Message Log	This report enables you to review equipment messages that are based on message type.	Plant & Equipment Maintenance (G1315), Print Equipment Message Log
R13419 Frequency of Occurrences Report	This report enables you to review the overall frequency of selected service types. This report is particularly useful when you need to review maintenance patterns by specific type of repair.	Cost Inquiries and Reports (G1312), Print Frequency of Occurrence

JD Edwards EnterpriseOne Capital Asset Management Reports: Selected Equipment Reports

Some equipment reports include a more detailed description, as well as information about processing options. These reports are listed alphanumerically by report ID in this section.

R12400 - Print Supplemental Data by Asset

The Print Supplemental Data by Asset (R12400) report is hard coded for AM Database Code. If you want to create the own Supplemental Database Codes, you need to also create the own Supplemental Data reports. Otherwise, the system only prints the AM Database Code.

Processing Options for the Supplemental Data Report by Asset Report (R12400)

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

Print Option

1. Bypass Printing Text
Specify whether the system prints text information on the report. Values are:

Blank: Print text information.

1: Do not print text information.

2. Print Equipment Number
Specify which number the system prints to identify the asset. Values are:

1: Print the asset number

2: Print the unit number

3: Print the serial number

R12440 - Print Supplemental Data by Type

The Print Supplemental Data by Type (R12440) report is hard coded for AM Database Code. If you want to create the own Supplemental Database Codes, you need to also create the own Supplemental Data reports. Otherwise, the system only prints the AM Database Code.

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Processing Options for the Supplemental Data by Data Type Report (R12440)

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

Print Option

1. Bypass Printing

Specify whether the system prints text information on the report. Values are:

Blank: Print text information.

1: Do not print text information.

2. Display Equipment Number

Specify which number the system prints to identify the asset. Values are:

1: Print the asset number

2: Print the unit number

3: Print the serial number

R12460 - Print Location Information

The Print Location Information report is a printed version of the information that appears on Location Transfer. The system prints the current, historical, and planned (future) locations for each piece of equipment. You also can use this report to print location tracking text.

The system draws information for this report from these tables:

- Location Tracking (F1204)
- Location History Text (F1210)

Processing Options for the Print Location Information Report (R12460)

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

Print

1. Location Tracking Text

Specify whether the system prints location tracking text. Values are:

Blank: Do not print the location tracking text.

1: Print the location tracking text.

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2. Equipment Number Format

Specify the format of the equipment number that appears on the report: Values are:

1: Asset number

2: Unit number

3: Serial number

3. Sequence

Specify how the system sequences report information. Values are:

Blank: Sequence the information by asset number.

1: Sequence the information by location.

JD Edwards EnterpriseOne Capital Asset Management Reports: Selected Cost Reports

Some cost reports include a more detailed description, as well as information about processing options. These reports are listed alphanumerically by report ID in this section.

R12310 – Time Entry Journal Report

You can print two versions of this report:

- Posted F/A

  Use this report to print equipment transactions that are posted to equipment as well as the general ledger.

- Unposted F/A

  Use this report to print equipment transactions that have not been posted to equipment and may or may not be posted to the general ledger.

You determine the accounts that post to equipment when you set up automatic accounting instructions (AAIs) FX01–FX98. Only the accounts within this range appear on the posted transaction ledger report. The Unposted F/A report version includes all time entry transactions, regardless of the affected accounts.

The report displays this information:

- Batch number
- Item number
- Work date
- Rate
- Rate type
- Hours
- Amount
- Account, description, and explanation

Processing Options for the Time Entry Journal Report (R12310)

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

Print

1. Print Asset Number

Specify which number the system uses to identify the asset. Values are:

1: Asset number

2: Unit number

3: Serial number

R12424 – Equipment Cost Analysis

You can use processing options to display the equipment usage amounts in units such as miles or hours. You can review the total units that a piece of equipment has accumulated, as well as the per unit cost. The system derives per unit costs by dividing account balances by total accumulated units.

This table describes the demo versions JD Edwards EnterpriseOne software provides of this report from which you may select:

Version	Description
Cost Analysis Sequenced by Object	Displays the summary of identical object accounts that belong to different business units
Cost Analysis Sequenced by Subsidiary	Displays interim total amounts only, such as: • Net book value • Revenue earned • Ownership costs • Operating costs • Maintenance costs • Usage amounts
Cost Analysis without Commas	Displays account balances for each business unit and object account

The system draws information for this report from the Asset Account Balances File table (F1202).

You can use processing options to determine the ledger type that you want to review. You can also omit items with zero account balances. Using data selections, you can print this report for selected companies, business units, category codes, and so on.

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Processing Options for the Equipment Cost Analysis Report (R12424)

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

Defaults

1. Period/Date

Specify the fiscal year for the period or date that is defined in the Period/Date field.

Enter a four-digit fiscal year in this processing option.

Blank: The system uses the date pattern that is established for default company 00000.

2. Fiscal Year

Specify the fiscal year for the period or date that is defined in the Period/Date field.

Enter a four-digit fiscal year in this processing option.

Blank: The system uses the date pattern that is established for default company 00000.

3. Ledger Type

Specify the ledger type for cost summary.

Blank: The system uses the AA ledger.

Process

1. Detail or Summary (Future)

Specify how the system summarizes information on the report. Values are:

D: Detailed report

O: Summarization by object

R: Summarization by subsidiary

S: Summarization by AT AAI

2. Unit Cost Suppression

Specify whether the system prints the Unit Cost columns. Values are:

Blank: Print the Unit Cost columns.

1: Do not print the Unit Cost columns.

3. Unit Cost AAIs

Specify the AAIs that the system uses for units in the Unit Cost columns when it prints unit cost. Values are:

Y: Use the AT00 AAI.

A: Use the FMA AAI.

B: Use the FMB AAI.

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Print

1. Zero Cost Print

Specify which assets the system prints. Values are:

Blank: Do not print assets with zero cost.

1: Print all assets.

2. Asset Number Print

Specify which number the system prints to identify the asset. Values are:

1: Print the asset number

2: Print the unit number

3: Print the serial number

R12426 – Equipment Billing Rates

The report displays this information:

- Rate table
- Rate group
- Equipment number
- Effective dates
- Rate code
- Billing Rate

If a billing rate is divided into components, the rate components also appear on the report.

Processing Options for the Equipment Billing Rates Report (R12426)

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

Print

1. Equipment Number Format

Specify which equipment number the system displays the Equipment Billing Rates report (R12426). Values are:

1: Asset number (default)

2: Unit number

3: Serial number

R13400 - Equipment Variance

You can view usage hours and other unit costs for each piece of equipment that you specify. A grand total of revenue, expense, and usage amounts for all pieces of equipment prints at the end of the report.

You can use processing options to define the range of accounts that you want the system to use for calculating amounts. You must define an account range for the Standard Amount column, which represents revenue totals, and for the Actual Amount column, which represents expense totals. You must also specify the accounts from which unit amounts are drawn for the Actual Hours column.

The Estimated Rate, Actual Rate, and Rate Variance columns represent unit costs. The system calculates these unit costs by dividing revenue and expense amounts by actual hours.

Use processing options to specify a date range and indicate whether you want the report to print inception-to-date amounts. If you indicate inception-to-date amounts, the system adds prior year balances to the amounts that are within the date range you specify.

You can print these two versions of the Equipment Variance report:

Version	Description
Variance by equipment	Prints information about the pieces of equipment that you specify
Variance by job	Prints amounts for equipment that you have assigned to a particular location

The system draws information for this report from these tables:

- Asset Account Balances (F1202)
- Account Ledger (F0911)

Processing Options for the Equipment Variance Report (R13400)

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

Date Selection

1. From Period:
Specify the beginning period of the date range that this report covers.

2. From Fiscal Year
Specify the beginning fiscal year of the date range that this report covers.

3. Thru Period:
Specify the ending period of the date range that this report covers.

4. Thru Fiscal Year
Specify the ending fiscal year of the date range that this report covers.

Account Range

1. Beginning Object Account:

Specify the beginning of the object account range that the system includes in calculations of Standard Amounts.

Enter this in the Standard Amount column.

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

2. Ending Object Account:

Specify the end of the object account range that the system includes in calculations of Standard Amounts.

Enter this in the Standard Amount column.

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

3. Beginning Object Account:

Specify the beginning of the object account range the system includes in calculations of Actual Amounts.

Enter this in the Actual Amount column.

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

4. Ending Object Account:

Specify the end of the object account range the system includes in calculations of Actual Amounts.

Enter this in the Actual Amount column.

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

5. Beginning Object Account:

Specify the beginning of the object account range the system includes in calculations of Actual Hours.

Enter this in the Actual Hour column.

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

6. Ending Object Account:

Specify the end of the object account range the system includes in calculations of Actual Hours.

Enter this in the Actual Hour column.

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

Print

1. Amounts

Specify the amounts that the system prints. Values are:

Blank: Print current period amounts.

1: Print inception-to-date amounts.

2. Equipment Number Format

Specify which equipment number format the system prints. Values are:

1: Asset number

2: Unit number

3: Serial number

JD Edwards EnterpriseOne Capital Asset Management Reports: Selected Work Order Reports

Some work order reports include a more detailed description, as well as information about processing options. These reports are listed alphanumerically by report ID in this section.

R13410 - Equipment Parts List

The system draws information for this report from these tables:

- Item Master (F4101).
- Bill of Material Master File (F3002).
- Asset Master File (F1201).

Processing Options for the Equipment Parts List Report (R13410)

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

Process

1. Equipment Number Format

Specify which equipment number format the system prints. Values are:

1: Asset Number (default).

2: Unit Number.

3: Serial Number.

2. Inventory Number Format
Specify which inventory number format the system prints. Values are:

1: Short Item Number (default).

2: Second Item Number.

3: Third Item Number.

R13415 – Work Order Parts List

You can select to update the material status and allocate a pick list number. The report lists the inventory item numbers on the pick lists for each work order. You can use the material status on the parts list to control the printing of detail lines. The pick list number can be used with the work order number to only display the new items that have been added to the parts list since the last pick list was printed.

The system retrieves information for this report from the Work Order Delivery Information table (F4829).

> **Note:** You can also print the parts list from Work Order Parts List Revisions (W17730A) by choosing Print WO Parts List from the Form menu.

Processing Options for the Work Order Parts List Report (R13415)

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

Edits

1. Material Status From
Specify the lowest material status from UDC 31/MS (Material Status) that the system uses to select orders for pick slip processing. Enter a value that identifies the status of a particular component on the work order parts list.

2. Material Status Thru
Specify the highest material status from UDC 31/MS (Material Status) that the system uses to select orders for pick slip processing. Enter a value that identifies the status of a particular component on the work order parts list.

3. Update Material Status To
Specify the status code from UDC 31/MS (Material Status) to be updated by the system. The code that you enter should identify the status of a particular component on the work order parts list.

4. Update Material Status
Specify whether the system updates the status of the work order parts detail line. Values are:

Blank: Do not update the status.

1: Update the status.

Display

1. Print Associated Text

Specify whether the system prints text associated with the work order parts list.

You can specify whether to print text associated with the work order parts list, the work order parts list detail line, or both. Values are:

Blank: Do not print associated text.

1: Print work order header and parts detail text.

2: Print only work order header text.

3: Print only parts detail text.

2. Print Delivery Information

Specify whether the system prints text lines associated with the work order delivery information.

You can specify whether to print text associated with the work order delivery information, delivery information about the work order parts list, or both. Values are:

Blank: Do not print delivery text.

1: Print header and detail text.

2: Print only header text.

3: Print only detail text.

Process

1. Allocate Pick Slip Number

Specify whether the system allocates the next available pick slip number from the Next Numbers program (P55TC03) program in JD Edwards EnterpriseOne Shop Floor Management. Values are:

Blank: Do not allocate the pick slip number.

1: Allocate the pick slip number.

R13418 - Budget to Actual Report

The report is based on information from the Asset Master File table (F1201). The system totals amounts by equipment number. For each work order, the report includes:

- Estimated hours and amount.
- Actual hours and amount.
- Variance between estimated and actual hours, and amounts.

Processing Options for the Budget to Actual Report (R13418)

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

Date

1. Work Order Date - Start

Specify the start date for work order selection.

2. Work Order Date - End

Specify the end date for work order selection.

Print

1. Equipment Number Format

Specify how the system displays the equipment number. Values are:

1: Display the asset number.

2: Display the unit number.

3: Display the serial number.

Update

1. WO Actual Amount

Specify whether the system runs the Update W.O. Actual Amounts program (R13800) to update the work order amounts as you print the report. Values are:

Blank: Do not update the work order amounts.

1: Update the work order amounts.

R13420 - Equipment History

The report includes completed work orders. You can use processing options to specify a date range to control which work orders to include in the report. You can also specify the work order category codes that you are using to define the problem. In addition, you can specify that the report print the actions which were taken to resolve the problem.

The system draws information for this report from these tables:

- Work Order Master File (F4801).
- Asset Master File (F1201).

Processing Options for the Equipment History Report (R13420)

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

Print

1. Equipment Number Format

Specify how the Equipment History Report (R13420) displays the equipment number. Values are:

1: Display the asset number (default).

2: Display the unit number.

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3: Display the serial number.

Process

1. Failure Code

Specify which category code the system uses in the Failure Code column of the Equipment History Report (R13420).

Enter a valid work order category code, ranging from **01** to **10.**

2. Action Code

Specify which category code the system uses in the Action Code column of the Equipment History Report (R13420).

Enter a valid work order category code, ranging from **01** to **10.**

Select

1. Completed Date - From

Specify the beginning of the range of Completion Dates used by the system to select work orders for the Equipment History Report (R13420).

The system uses this date in conjunction with the Completed Date - To processing option to define a range of valid work order Completion Dates.

2. Completed Date - To

Specify the end of the range of Completion Dates used by the system to select work orders for the Equipment History Report (R13420).

The system uses this date in conjunction with the Completed Date - From processing option to define a range of valid work order Completion Dates.

R13430 - Work Order Completion Report

The report includes this information:

- Number of work orders that were created for each piece of equipment.
- Number of work orders that were completed for each piece of equipment.
- Number of work orders that are pending with parts requirements.
- Percent of complete work orders.
- Percent of pending work orders.

The system draws information for this report from these tables:

- Work Order Master File (F4801).
- Asset Master File (F1201).

R13440 - Labor Utilization Report

The system draws information for this report from these tables:

- Work Order Routing (F3112).

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- Work Order Master File (F4801).
- Asset Master File (F1201).

Processing Options for the Print Labor Utilization Report (R13440)

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

Print

1. Equipment Number Format

Specify how the report displays the equipment number. Values are:

1: Display the asset number.

2: Display the unit number.

3: Display the serial number.

R13450 - Parts Forecast Report

The report includes this information:

- Equipment number on the work order.
- Planned completion date.
- Parts requirements.
- Parts availability.

The system draws information for this report from these tables:

- Work Order Master File (F4801).
- Asset Master File (F1201).

Processing Options for the Print Parts Forecast Report (R13450)

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

Print

1. Inventory Item Number Format

Specify which inventory number format the system prints for the component item number. Values are:

1: Print the Short Item number.

2: Print the Second Item number (default).

3: Print the Third Item number.

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2. Equipment Number Format

Specify how the report displays the equipment number. Values are:

1: Display the asset number.

2: Display the unit number.

3: Display the serial number.

Process

1. Branch for Quantity on Hand

Specify a specific branch the system uses to calculate the quantity on hand.

The system limits the quantity on hand to the quantity for the branch.

Blank: All Branches

JD Edwards EnterpriseOne Capital Asset Management Reports: Selected Maintenance Planning Reports

Some maintenance planning reports include a more detailed description, as well as information about processing options. These reports are listed alphanumerically by report ID in this section.

R13412 - PM Projections Report

The PM forecast includes four periods. You use processing options to specify whether the periods on the report represent weeks, months, or quarters. The report lists all service types for each piece of equipment, the service intervals that are associated with the service types, and the estimated hours to complete any service types that come due for the periods which are represented by the report.

The system draws information for this report from the PM Projections table (F13411).

Processing Options for the Print PM Projections Report (R13412)

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

Process

1. Beginning Date

Specify the date from which to start printing the projections.

2. Period Type

Specify the type of periods in which to group the projections. Values are:

W: Weekly periods

M: Monthly periods

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Q: Quarterly periods

3. Forecast Type

Specify the forecast type to be used when printing PM projections. Enter a value from UDC 34/DF (Forecast Type).

4. Work Center

Specify the work center. The system forecasts only those preventive maintenance schedules that have a model work order that uses this work center.

Blank: All preventive maintenance schedules.

Print

1. Equipment Number Format

Specify which equipment number appears on the Update PM Schedule Status report (R12807). Values are:

1: Asset number

2: Unit number

3: Serial number

2. Print Parts List

Specify whether the system print the parts list. Values are:

Blank: Do not print the parts list.

1: Print the parts list.

R3450 - Master Production Schedule

The most current material plan generation supplies the information for the report. The report is a printed version of the information that you can access online by using Item Availability by Time and Item Detail Messages.

You use processing options to select the items that print on the report and to determine whether to print the time series, planning messages, or both. You also define the row types that print for each time series. Row types determine the quantity type information, such as Beginning Available and Ending Available. In addition, you define the columns that print for each time series. Columns determine the time periods that you want to review. The report also provides detailed information for each item, such as quantity on hand, buyer numbers, and planner numbers.

The system draws information for this report from these tables:

- MPS/MRP/DRP Summary File (F3413).
- MPS/MRP/DRP Message File (F3411).
- Forecast Consumption Periods (F3405).

Consider this information when you set processing options for this report:

- Start dates processing option

  The start date must be within the planning horizon that you defined when you ran the Parts Plan Generation for this report. You can indicate a start date for the report that is different from the original plan generation. However, you should ensure that past due time periods for the report are set to zero.

- Past due weeks

    The number of time periods (columns) that you specify to print on the report includes the number of weeks that you specify for past due amounts.

Processing Options for the Print Master Production Schedule Report (R3450)

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

Process

Report Start Date.
Specify the start date for the order. You can enter this date manually, or have the system calculate it using a backscheduling routine.

The routine starts with the required date and offsets the total lead time to calculate the appropriate start date.

The system uses today's date as the default value.

Number of time periods.
Specify a number (maximum of 54 periods) indicating the current accounting period.

This number, used in conjunction with the Company Constants table (F0010) and the General Constants table (F0009), enables the user to define up to 14 accounting periods.

The current period number is used to determine posted before and posted after cut off warning messages. It is also used as the default accounting period in the preparation of financial reports.

Number of past due weeks.
Specify the Weeks Worked.

Enter the number of past due weeks (**0, 1,** or **2** weeks that are enabled and **0** is the default).

User-Defined Code.
Specify a code that identifies the table that contains user-defined codes.

The table is also referred to as a user-defined code type. Enter the UDC for the list row descriptions.

Print 1

MPS Time Series
Enter **1** to print MPS Time Series Section.

MPS Messages
Enter **1** to print MPS Messages Section.

Suppress blank lines.
Enter **1** to suppress the blank lines when printing the Time Series.

Print 2

Summarize supply and demand lines.
Enter **1** to summarize the supply lines into one line and the demand lines into one line.

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Report Unit of Measure.

Enter the Unit of Measure in which you want the quantities printed. Values are:

1: Primary

2: Production

3: Component

JD Edwards EnterpriseOne Capital Asset Management Reports: Selected Labor Planning Reports

Some labor planning reports include a more detailed description, as well as information about processing options. These reports are listed alphanumerically by report ID in this section.

R3350 – Capacity Requirements and Messages Report

Use processing options to control this information on the report:

- Time period.

- Unit of measure for load information.

- Type of planning.

- Capacity requirements, capacity messages, or both.

- User-defined code for row descriptions.

Although you can run three versions of the report, the JD Edwards EnterpriseOne Plant and Equipment Management system uses the Capacity Requirements Planning version.

The system draws information for this report from these tables:

- Capacity Load Table (F3313).

- Capacity Message File (F3311).

- Work Center Master File (F30006).

When you set processing options for this report, consider that any unit of measure that you enter in the processing options must be the same unit of measure that is used in the Account Master table (F0901) for the work center.

Load Types

A load type describes the type of labor demand placed on a work center. The system calculates the five load types:

- Rated Profile

  The total resource units from the Work Center Revisions form.

- Loaded Profile

  The load that is forecast from the planned and released work orders.

- Percent Resource Used

The Loaded Profile that is divided by the Rated Profile.

- Resource Available

    The Loaded Profile subtracted from the Rated Profile.

- Cumulative Resource Available

    A running total of the resources available. If a work center runs over capacity, this number could be negative. If the work center runs under-capacity, the cumulative resources could increase each period.

Processing Options for the Capacity Requirements and Messages Report (R3350)

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

Defaults

1. Enter the Capacity Mode:

Specify a code indicating which planning is being used. Values are:

1: Resource Requirements Planning.

2: Rough Cut Capacity Planning.

3: Capacity Requirements Planning.

2. Enter the Unit of Measure.

Specify a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

3. Enter the Start Date for the report.

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

4. Enter a 1 to print Capacity Requirements.

Specify the Yes or No Entry field is a common single character entry field for simple yes or no responses on prompt screens.

5. Enter a 1 to print Capacity Messages.

Specify the Yes or No Entry field is a common single character entry field for simple yes or no responses on prompt screens.

6. Enter the number of periods for the report (1–54).

Specify a code that specifies the event point for an integer.

7. Enter the User-Defined Code to use for the row descriptions.

Specify a code that identifies the table that contains UDCs. The table is also referred to as a UDC type.

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R3352 - Period Summary Report

You can specify the type of planning by selecting the appropriate report version. CAM uses the Capacity Requirements Planning version.

The system draws information for this report from these tables:

- Capacity Load Table (F3313).
- Capacity Pegging (F3312).
- Work Center Master File (F30006).

When you set processing options for this report, consider that the system uses the Period From and the Period To dates that you enter:

- If you enter dates in both fields, the system prints the summary within that period.
- If you enter a date in the Period To field only, the system prints the summary beginning with the current period.

   If you do not select a Period From date, the system prints the past due orders before the current date.

- If you enter a date in the Period From field only, the system prints all items from that date onward.
- If more than one order for an item is scheduled at the work center for the same period, the system prints the item number once for each order in the report.

Processing Options for the Period Summary Report (R3352)

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

Defaults

1. Enter the Capacity Mode:
Specify a code indicating which planning is being used. Values are:

1: Resource Requirements Planning.

2: Rough Cut Capacity Planning.

3: Capacity Requirements Planning.

2. Enter the Starting Period date.
Specify the date that an item is scheduled to arrive or that an action is scheduled for completion.

3. Enter the Ending Period date.
Specify the date that an item is scheduled to arrive or that an action is scheduled for completion.

4. Enter up to 5 Units of Measure for the report - Unit of Measure 1.
Specify a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity for Unit of Measure 1.

For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

4. Enter up to 5 Units of Measure for the report - Unit of Measure 2.

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Specify a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity for Unit of Measure 2.

For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

4. Enter up to 5 Units of Measure for the report - Unit of Measure 3.

Specify a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity for Unit of Measure 3. For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

4. Enter up to 5 Units of Measure for the report - Unit of Measure 4.

Specify a value from UDC 00/UM (Unit of Measure) that identifies the unit of measurement for an amount or quantity for Unit of Measure 4. For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

JD Edwards EnterpriseOne Capital Asset Management Reports: Selected Preventive Maintenance Reports

Some preventive maintenance reports include a more detailed description, as well as information about processing options. These reports are listed alphanumerically by report ID in this section.

R12407 - Maintenance Schedule

The Maintenance Schedule report displays the service types that you assign for each piece of equipment on the preventive maintenance schedule. Depending on the maintenance status of each service type, the system determines whether it is scheduled, in process, or complete.

You can run these three versions of the report:

Version	Description
Completed maintenance records	Prints service types that have a maintenance status of 98 (canceled) or 99. The completion date prints, as well as the total miles, fuel, hours, or other user-defined statistical units for the equipment. The address book number of the employee completing the service also prints.
Scheduled maintenance records	Prints service types that have a maintenance status of less than 98. If you schedule the service for a specific date, the date prints. If you schedule the service at intervals, the number of days prints. If you schedule the service according to miles, fuel, hours, or other user-defined statistical units, the appropriate numbers print.
Mechanic's worksheet	Prints service types that have a user-defined maintenance status-for example, between 50 and 70. If you schedule service according to miles, fuel, hours, or other user-defined statistical units, the current readings for the item print. The % Due column on the report displays how close the service is to being due or whether it is overdue. The address number of the employee assigned to the task also prints.

The system draws information for this report from these tables:

- Maintenance Schedule File (F1207)
- Asset Master File (F1201)

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Processing Options for the Print Maintenance Schedule Report (R12407)

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

Print

1. Report Format

Specify which statuses the system uses to determine what to print.

Use data selection to indicate which statuses are included on the report. Values are:

1: Completed maintenance (typically, statuses that are greater than 99).

2: Scheduled maintenance (typically, statuses that are less than 99).

3: Mechanic's worksheet (typically, statuses that are between 50 and 70).

2. Standard Text

Specify whether the system prints the standard text associated with a procedure. Values are:

Blank: Do not print standard text.

1: Print standard text.

3. Equipment Number Format

Specify the equipment number format that appears on the report. Values are:

1: Asset number

2: Unit number

3: Serial number

4. Location

Specify whether the system organizes the report by location. Values are:

Blank: Do not print assets by location.

1: Print assets by location and set page breaks by location. When you select to print assets by location and set page breaks, you should include the location early in the data selection (for example, Company, Location, Asset Number; or Location, Asset Number.)

R12450 - Equipment Message Log

Message types are UDCs in table 12/EM (Equipment Messages) and might include:

- Problem messages
- Planned maintenance messages
- Actual maintenance messages

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You can print these four versions of this report:

- Actual Maintenance

- Reported Problems

- Planned Maintenance

- Reported Problems versus Maintenance

The Maintenance Log report prints messages in this sequence:

1. Equipment number
2. Date
3. Time

The report includes cleared messages only if you use data selections to specify that you want those messages to appear. The report also includes messages with a tickler date (the date when the messages go into effect).

The system draws information for this report from these tables:

- Equipment Messages (F1205)

- Asset Master File (F1201)

Processing Options for the Print Equipment Message Log Report (R12450)

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

Print

1. Equipment Number Format
Specify the equipment number format that appears on the report. Values are:

1: Asset number

2: Unit number

3: Serial number

R13419 – Frequency of Occurrences Report

The report displays the service types that you specify, the estimated and actual frequency of each service type, and the percentage of each service type for which maintenance has been fulfilled.

The system draws information for this report from these tables:

- Asset Master File (F1201)

- Maintenance Schedule File (F1207)

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Processing Options for the Print Frequency of Occurrence Report (R13419)

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

Date

1. From Date

Specify the from date that the system uses to calculate the frequency of occurrence.

The system uses this date in conjunction with the through date to search for records in the Maintenance Schedule File table (F1207), based on actual completion dates.

2. Thru Date

Specify the through date that the system uses to calculate the frequency of occurrence.

The system uses this date in conjunction with the from date to search for records in the Maintenance Schedule File table (F1207), based on actual completion dates.

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28 Appendix B - Delivered Workflow for JD Edwards EnterpriseOne Capital Asset Management

Delivered Workflows for JD Edwards EnterpriseOne Capital Asset Management

This section discusses the JD Edwards EnterpriseOne Capital Asset Management workflows.

Work Order Activity Rules

This section discusses the Work Order Activity Rules workflow.

Description

Workflow Description

The system calls the workflow WOACTRULES when adding a work order or changing the status of a work order. The system sends approval messages for status changes based on the approval type, work order type, and estimated amount. WOACTRULES will determine the available next status (es) for the order type.

Workflow Trigger

Adding a work order or changing the estimated amount or status on a work order.

Workflow Action

The system sends an approval message to a user-defined distribution list. The status is not changed until the change has been approved.

Workflow Objects

System

13

Workflow Object Name

WOACTRULES

Object ID

W90CD002B, N4800350, P13714 / W13714A, P13714 / W13714B, P17714 / W17714A

Event Description / Function Name

Call Work Order Work Flow, Ok Post Button Clicked, Save Changes Button Clicked

Sequence / Line Numbers

235, 109, 85, 160, 271

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WM Document Type

This section discusses the WM Document Type workflow.

Description

Workflow Description

WMTYPE is a part of the WOACTRULES workflow process. WOACTRULES calls WMTYPE process when the work order document type is for maintenance; the code is WM in the 00/DT UDC table.WMTYPE determines the type of work order to process. Depending on whether the work order type is 1 or 6, WMTYPE calls WMTYPE1 or WMTYPE6 workflow process.

Workflow Trigger

WOACTRULES workflow triggers WMTYPE workflow when the work order document type is WM.

Workflow Action

WMTYPE processes type 1 or type 6 work order type.

Workflow Objects

System

13

Workflow Object Name

WMTYPE

Object ID

WOACTRULES

Event Description / Function Name

NA

Sequence / Line Numbers

NA

WM Type Code 1

This section discusses the WM Type Code 1.

Description

Workflow Description

WMTYPE1 is a part of the WOACTRULES workflow process. WMTYPE calls WMTYPE1 process when the work order type is 1 for one time maintenance work. WMTYPE1 determines the approval type to process. Depending on whether the approval type is 1 or 2, WMTYPE1 calls WM1APP1 or WM1APP2 workflow process.

Workflow Trigger

WMTYPE workflow triggers WMTYPE1 workflow when the work order type is 1.

Workflow Action

WMTYPE1 determines whether the approval type is 1 or 2 and calls WM1APP1 or WM1APP2 workflow.

Workflow Objects

System
13

Workflow Object Name
WMTYPE1

Object ID
WMTYPE

Event Description / Function Name
NA

Sequence / Line Numbers
NA

WM Type Code 6

This section discusses the WM Type Code 6 workflow.

Description

Workflow Description
WMTYPE6 is a part of the WOACTRULES workflow process. WMTYPE calls WMTYPE6 process when the work order type is 6 for scheduled and recurring maintenance work.

Workflow Trigger
WMTYPE workflow triggers WMTYPE6 workflow when the work order type is 1.

Workflow Action
The system does not process action with this workflow.

Workflow Objects

System
13

Workflow Object Name
WMTYPE6

Object ID
WMTYPE

Event Description / Function Name
NA

Sequence / Line Numbers
NA

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WM Type 1 Approval Type 1

This section discusses the WM Type 1 Approval Type 1 workflow.

Description

Workflow Description

WM1APP1 is a part of the WOACTRULES workflow process. WMTYPE1 calls WM1APP1 process when the approval route is 1. WM1APP1 determines the distribution list to send the work order approval based on the status of the work order. WM1APP1 advances the status to approved and allows for further advancement of statuses.

Workflow Trigger

WMTYPE1 workflow triggers WM1APP1 workflow when the work order approval route is 1.

Workflow Action

If work order status = M or M*, the system sends an approval message to the distribution list (M= 7405, M* = 7384). Once approved, the system advances the status to approved and allows for further advancement of statuses. If work order status is not equal to M or M*, then no approval action is required and the status is advanced.

Workflow Objects

System

13

Workflow Object Name

WM1APP1

Object ID

WMTYPE1

Event Description / Function Name

NA

Sequence / Line Numbers

NA

WM Type 1 Approval Type 2

This section discusses the WM Type 1 Approval Type 2 workflow.

Description

Workflow Description

WM1APP2 is a part of the WOACTRULES workflow process. WMTYPE1 calls WM1APP2 process when the approval route is 2.

WM1APP2 determines the distribution list to send the work order approval based on the status of the work order. WM1APP2 advances the status to approved and allows for further advancement of statuses.

Workflow Trigger

WMTYPE1 workflow triggers WM1APP2 workflow when the work order approval route is 2.

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Workflow Action

If work order status = M*, the system sends an approval message to the distribution list 7384. Once approved, the system advances the status to approved and allows for further advancement of statuses. If work order status is not equal to M*, then no approval action is required and the status is advanced.

Workflow Objects

System
13

Workflow Object Name
WM1APP2

Object ID
WMTYPE1

Event Description / Function Name
NA

Sequence / Line Numbers
NA

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29   Appendix C - Delivered User Defined Objects for Capital Asset Management (Release 9.2 Update)

Delivered User Defined Objects for Capital Asset Management (Release 9.2 Update)

This appendix discusses delivered user defined objects (UDOs) that you can use with the Capital Asset Management system.

Capital Asset Management Notifications

JD Edwards EnterpriseOne notifications enable you to improve your business efficiency through the use of proactive notifications that are actionable. Proactive notifications enable the system to notify users of business events as they happen without the need for the user to be online.

This section discusses delivered notifications that you can use with the Capital Asset Management system. For a complete listing of available notifications, along with additional information about them, see the Notifications Cross Reference in Oracle Support (Document 2365066.1 - JD Edwards EnterpriseOne Delivered Notifications), which can be found at:

https://support.oracle.com/epmos/faces/DocumentDisplay?id=2365066.1

For additional information about using and subscribing to notifications, see these topics:

- *Creating a Notification* in the *JD Edwards EnterpriseOne Tools Notifications Guide* .
- *Testing Notifications* in the *JD Edwards EnterpriseOne Tools Notifications Guide* .
- *Subscribing to Notifications (Release 9.2.2)* in the *JD Edwards EnterpriseOne Tools Foundation Guide* .

This table describes notifications that you can use with the Capital Asset Management system:

Notification	Description
JDE_NOTIFY_13_Unassigned_WO	Notifies subscribers of unassigned work orders for the subscription's specific business unit, work order type, and work order document type. This notification runs every 10 minutes.
JDE_NOTIFY_13_PO_At_Status	Notifies subscribers when their subscription's specific purchase order is at or above the specified status. This notification runs every weekday at 8:00 am and 2:00 pm. **Note:** When subscribing to this notification, you specify the status and purchase order for which you want to be notified. It is recommended that you also set the Policy for the subscription to be Only Once as you will only need to be notified once when the purchase order reaches your requested status.

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Notification	Description
JDE_NOTIFY_13_Open_Alerts	Notifies subscribers of condition-based alerts at an open status for the subscription's selected business unit. This notification runs every weekday at 8:00 am.
JDE_NOTIFY_13_Overdue_PMs	Notifies subscribers of past due preventive maintenance. This notification runs every weekday at 8:00 am.
JDE_NOTIFY_13_Equipment_Down	Notifies subscribers of equipment at the input Location and Status. If the status is left blank, it will default to Down (DN). This notification runs every hour on weekdays between 7:00 am and 5:00 pm.

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30 Glossary

Account Number

Enter a value that identifies an account in the general ledger.

Use one of these formats to enter account numbers:

- Standard account number (business unit.object.subsidiary or flex format).

- Third general ledger number (maximum of 25 digits).

- Account ID number. The number is eight digits long.

- Speed code, which is a two-character code that you concatenate to the automatic accounting instructions (AAI) item SP. You can then enter the code instead of an account number.

The first character of the account number indicates its format. You define the account format in JD Edwards EnterpriseOne General Ledger constants.

Batch Number

Enter a number that identifies a group of transactions that the system processes and balances as a unit.

When you enter a batch, you can either assign a batch number or let the system assign it using the Next Numbers program (P0002).

Branch

Enter a code that represents a high-level business unit.

Use this code to refer to a branch or plant that might have departments or jobs, which represent lower-level business units, subordinate to it. For example:

- Branch/Plant (MMCU)

- Dept A (MCU)

- Dept B (MCU)

- Job 123 (MCU)

Business unit security is based on the higher-level business unit.

The branch default value is derived from the equipment record and defines the branch/plant from which inventory is issued.

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Branch/Plant

Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs.

For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

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

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

Business Unit

Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs.

For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

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

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

The system enters the default value for this field from records such as the equipment number, inventory item number, or customer number, based on SWM constants.

Company

Enter a code that identifies a specific organization, fund, or other reporting entity.

The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.

You can use company 00000 for default values such as dates and automatic accounting instructions. You cannot use company 00000 for transaction entries.

Cost Type

Enter a code that designates each element of cost for an item.

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Examples of the cost object types are:

- **A1:** Purchased raw material.

- **B1:** Direct labor routing roll-up.

- **B2:** Setup labor routing roll-up.

- **C1:** Variable burden routing roll-up.

- **C2:** Fixed burden routing roll-up.

- **Dx:** Outside operation routing roll-up.

- **Xx:** Extra add-ons, such as electricity and water.

The optional add-on computations usually operate with the type Xx extra add-ons. This cost structure enables you to use an unlimited number of cost components to calculate alternative cost rollups. The system then associates these cost components with one of six user-defined summary cost buckets.

Customer Number

Enter a number that identifies an entry in JD Edwards EnterpriseOne Foundation - Address Book, such as employee, applicant, participant, customer, supplier, tenant, or location.

You can use this number to locate and enter information about the address book record. If you enter a value other than the address book number (AN8), such as the long address or tax ID, you must precede it with the special character that is defined in JD Edwards EnterpriseOne Foundation - Address Book constants. When the system locates the record, it returns the address book number to the field.

For example, if address book number 4100 (Total Solutions) has a long address TOTAL and an * distinguishes it from other entries (as defined in JD Edwards EnterpriseOne Foundation - Address Book constants), you could type ***TOTAL** into the field, and the system would return 4100.

Daylight Savings Rule

Enter a unique name identifying a daylight savings rule.

Use daylight savings rules to adjust time for a geographic and political locale.

This field applies to the time zone of the customer or service provider as appropriate.

Equipment Number

An identification code that represents an asset. You enter the identification code in one of these formats:

1: Asset number (a computer-assigned, eight-digit, numeric control number).

2: Unit number (a 12-character alphanumeric field).

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3: Serial number (a 25-character alphanumeric field).

Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character that you enter indicates whether you are entering the primary (default) format that is defined for the system, or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats in the fixed asset constants.

Equipment Status

Enter a value from UDC 12/ES (Status or Disposal Code) that identifies the equipment or disposal status of an asset, such as available, down, or disposed.

Failure Description

Enter a description of the customer issue.

If you are accessing this form from the Case or Failure Analysis modules, the system enters information from the equipment record as default information when you enter a work order. The system also checks entitlement for the customer.

Depending on how you have set the processing options, the first 80 characters from the media object can be used as the default value for the **Failure Description** field.

Flat Rate

Enter a code used to determine if this type of service should be priced based on a flat rate or based on actual time and materials. Values are:

Blank: A blank value is only valid when defining the Method of Pricing for a service provider. It is used to indicate that the service provider is an internal service provider and should not be paid.

F: Charges for labor are based on one flat rate. Charges for parts are already included in the flat rate.

T: Charges for labor are based on actual labor hours. Charges for parts are based on actual parts used.

If you use flat rate as the pricing method, you must associate one labor step with the work order.

Geographic Region

Enter the geographic region of the customer.

The system retrieves this information when you enter a case for this customer.

Inventory Item Number

Enter a number that the system assigns to an item.

It can be in short, long, or third item number format. If you enter a value in the **Inventory Item Number** field, the system copies the parts detail and labor detail to the assigned work order.

It can be in short, long, or third item number format.

Required only if processing option is set accordingly.

You do not need to enter an equipment number. The system automatically assigns the equipment number from the PM schedule or the condition-based alert for which the work order applies.

Ln Ty (line type)

Enter a line type to distinguish the various methods of recording stock and nonstock inventory.

This value is a code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces, such as:

- JD Edwards EnterpriseOne General Ledger
- JD Edwards EnterpriseOne Job Cost
- JD Edwards EnterpriseOne Accounts Payable
- JD Edwards EnterpriseOne Accounts Receivable
- JD Edwards EnterpriseOne Inventory Management

It also specifies the conditions under which a line prints on reports, and it is included in calculations. Values include:

S: Stock item

J: Job cost

N: Nonstock item

F: Freight

T: Text information

M: Miscellaneous charges and credits

W: Work order

Location

Enter the current physical location of an asset.

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The location must have a valid business unit or job number in the Business Unit Master table (F0006).

Planner Number

Enter a user-defined name or number that identifies the address book record of the material planner.

You can use this field to enter and locate information. If you enter a value other than the address book number (AN8), such as the long address or tax ID, you must precede it with the special character (as defined in JD Edwards EnterpriseOne Foundation - Address Book constants). When the system locates the record, it returns the address book number into the field.

You must enter a planner number to be able to run parts inquiries and searches by planner.

Planning Code

Enter a code that indicates how Master Production Schedule (MPS), Material Requirements Planning (MRP), or Distribution Requirements Planning (DRP) processes this item. Values are:

0: Not Planned by MPS, MRP, or DRP.

1: Planned by MPS or DRP.

2: Planned by MRP.

3: Planned by MRP with additional independent forecast.

4: Planned by MPS, Parent in Planning Bill.

5: Planned by MPS, Component in Planning Bill.

These codes are hard coded.

You should enter a **2** in this field.

Product Family

Enter a code that classifies an inventory item into a group for customer service. Some examples include:

- Laser Printer
- Inkjet
- Fax

Complete this field to create a UDC for a product family.

On some forms this is an optional field.

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Product Model

Enter a code that classifies an inventory item into a model for customer service. Some examples include:

- Laser Printer
- Inkjet
- Fax

Complete this field to create a UDC for a product model with the specified family.

On some forms this field is optional,

Receivables Y/N

Enter an option that identifies the address number as that of a customer and that you accept receivables from this customer. Values are:

On: This is a customer.

Off: This is not a customer.

Complete this field if the service provider is also a customer.

Site Number

Enter a user-defined name or number that identifies an address book record.

You can use this number to locate and enter information about the address book record. If you enter a value other than the address book number (AN8), such as the long address or tax ID, you must precede it with the special character that is defined in JD Edwards EnterpriseOne Foundation - Address Book constants. When the system locates the record, it returns the address book number to the field.

For example, if address book number 4100 (Total Solutions) has a long address TOTAL and an * distinguishes it from other entries (as defined in JD Edwards EnterpriseOne Foundation - Address Book constants), you could type ***TOTAL** into the field, and the system would return 4100.

Status

Enter a value from UDC 00/SS (Work Order Status) that describes the status of a work order, rate schedule, engineering change order, or status of the work order.

Any status change from 90 through 99 causes the system to automatically update the completion date.

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Stocking Type

Enter a value from UDC 41/I (Stocking Type Code) that indicates how you stock an item, for example, as finished goods or as raw materials.

These stocking types are hard-coded and you should not change them:

0: Phantom item

B: Bulk floor stock

C: Configured item

E: Emergency/corrective maintenance

F: Feature

K: Kit parent item

N: Nonstock

The first character of Description 2 in the UDC table indicates if the item is purchased (P) or manufactured (M).

When defining inventory parts (particularly kits), do not use hard-coded stocking types. Instead, create a stocking type, and enter an **M** or **P** in the second description.

Subledger

Enter a code that identifies a detailed, auxiliary account within a general ledger account.

A subledger can be an equipment item number or an address book number. If you enter a subledger, you must also specify the subledger type.

Subledger is not required if you are using speed coding.

Subledger Inactive Code

Enter an option that indicates whether a specific subledger is inactive.

This field must not be blank. Examples of inactive subledgers are:

- Jobs that are closed.
- Employees who have been terminated.
- Assets that have been disposed.

Select this option to indicate that a subledger is inactive. If a subledger becomes active again, clear this option.

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If you want to use subledger information in the tables for reports, but you want to prevent transactions from posting to the record in the Account Balances table, select this option. Values are:

Off: Subledger active

On: Subledger inactive

Subledger Type

This is not required if you are using speed coding.

Subsidiary

Specify a subset of an object account.

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

If you are using a flexible chart of accounts and the object account is set to six digits, you must use all six digits. For example, entering **000456** is not the same as entering **456** because, if you enter **456,** the system enters three blank spaces to fill a six-digit object.

Sub Type

Enter a value from UDC 00/ST (Subledger Type) that is used with the **Subledger** field to identify the subledger type and how the system performs 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. Values include:

A: Alphanumeric field, do not edit.

N: Numeric field, right justify and zero fill.

C: Alphanumeric field, right justify and blank fill.

Supervisor

Enter the address book number of the supervisor.

For some programs, you can use a processing option to specify a default value for this field based on values for category codes (phases) 1, 2 and 3. You can set up the default values in the Work With Work Order Default Codes program (P48001). The system automatically displays the information that you specify on all work orders that you create, provided that you meet the category code criterion. You can override the default value.

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For JD Edwards EnterpriseOne Service Management, the Supervisor represents the secondary service provider.

Supplier Number

Enter a user-defined name or number that identifies the address book record of the preferred provider.

You can use this field to enter and locate information. If you enter a value other than the address book number (AN8), such as the long address or tax ID, you must precede it with the special character that is defined in JD Edwards EnterpriseOne Foundation - Address Book constants. When the system locates the record, it returns the address book number into the field.

You must enter a value in the **Supplier** field on the Item/Branch Plant Information form for each part.

Time and Materials

Enter a code used to determine if this type of service should be priced based on a flat rate or based on actual time and materials. Values are:

Blank: A blank value is only valid when defining the Method of Pricing for a service provider. It is used to indicate that the service provider is an internal service provider and should not be paid.

F: Charges for labor are based on one flat rate. Charges for parts are already included in the flat rate.

T: Charges for labor are based on actual labor hours. Charges for parts are based on actual parts used.

If you use time and materials to price, both parts and labor are priced.

The values for the **Flat Rate** and **Time and Materials** fields come from the service contract's service package, based on the type of service on the work order.

The system retrieves tax rate/area information based on the service address number. Tax rate/area information is based on where the work is completed, not on the location of the customer.

Time Zone

Select the time zone for which you want to view the date and time.

This required field contains the time zone of the customer or service provided as appropriate. It is used to calculate the commitment date and time for cases and work orders.

Type Bill of Material

Enter a value from UDC 40/TB (Bill Type) that designates the type of bill of material.

You can define different types of bills of material for different uses. For example:

- **M:** Standard manufacturing bill
- **RWK:** Rework bill
- **SPR:** Spare parts bill

The system enters bill type **M** in the work order header when you create a work order, unless you specify another bill type. The system reads the bill type code on the work order header to know which bill of material to use to create the work order parts list. MRP uses the bill type code to identify the bill of material to use when it attaches MRP messages. Batch bills of material must be type **M** for shop floor management, product costing, and MRP processing.

Type of Routing

Enter a value from UDC 40/TR (Routing Type) that indicates the type of routing.

You can define different types of routing instructions for different uses. For example:

- **M:** Standard Manufacturing Routing
- **RWK:** Rework Routing
- **RSH:** Rush Routing

You define the routing type on the work order header. The system then uses the specific type of routing that you define in the work order routing.

JD Edward EnterpriseOne Product Costing and Capacity Planning systems use only **M** type routings.

The Type of Bill of Material and the Type of Routing values are important when the system copies the parts and labor detail from the inventory item number at the time that a work order is created. You can set default values from the processing options

User ID

Enter the code that identifies a user profile.

Work Center

Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs.

For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

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

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

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The system uses the work center for entitlement checking and to retrieve the workday calendar. If you do not set up the work center, you must set up a workday calendar that is set for **ALL.**

Index