# JD Edwards EnterpriseOne Applications

## UX One Roles User Guide

9.2

JD Edwards EnterpriseOne Applications
UX One Roles User Guide

9.2

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# Preface

Welcome to the JD Edwards EnterpriseOne documentation.

## Documentation Accessibility

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## 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. |

# 1 Introduction to JD Edwards EnterpriseOne UX Roles

## Understanding this Guide

This guide describes the UX One roles that are available for use and discusses how to use them.

This guide contains the following chapters:

- *Chapter 1 - Introduction to JD Edwards EnterpriseOne UX Roles*
- *Chapter 2 - Understanding UX One Role Navigation*

**Part I: Accounts Payable Roles** contains the following chapters:

- *Chapter 3 - Accounts Payable Roles: Accounts Payable Manager*
- *Chapter 4 - Accounts Payable Roles: Additional UX One Components for Accounts Payable*

**Part II: Accounts Receivable Roles** contains the following chapters:

- *Chapter 5 - Accounts Receivable Roles: Accounts Receivable Manager*
- *Chapter 6 - Accounts Receivable Roles: Collection Manager*
- *Chapter 7 - Accounts Receivable Roles: Credit Manager*
- *Chapter 8 - Accounts Receivable Roles: Additional UX One Components for Accounts Receivable*

**Part III: Advanced Pricing Roles** contains the following chapters:

- *Chapter 9 - Advanced Pricing Roles: Pricing Operations Manager*
- *Chapter 10 - Advanced Pricing Roles: Procurement Pricing Operations Manager*
- *Chapter 11 - Advanced Pricing Roles: Strategic Pricing Manager*
- *Chapter 12 - Advanced Pricing Roles: Additional UX One Components for Advanced Pricing*

**Part IV: Agreement Management Roles** contains the following chapters:

- *Chapter 13 - Agreement Management Roles: Procurement Agreement Manager (Release 9.2 Update)*
- *Chapter 14 - Agreement Management Roles: Sales Agreement Manager (Release 9.2 Update)*

**Part V: Benefits Management Roles** contains the following chapters:

- *Chapter 15 - Benefits Management Roles: Benefits Manager*

**Part VI: Blend Management Roles** contains the following chapters:

- *Chapter 16 - Blend Management Roles: Wine Cellar Manager (Release 9.2 Update)*
- *Chapter 17 - Blend Management Roles: Winemaker (Release 9.2 Update)*

**Part VII: Capital Asset Management Roles** contains the following chapters:

- *Chapter 18 - Capital Asset Management Roles: Asset Manager (Release 9.2 Update)*
- *Chapter 19 - Capital Asset Management Roles: Maintenance Manager*
- *Chapter 20 - Capital Asset Management Roles: Maintenance Scheduler (Release 9.2 Update)*

- *Chapter 21 - Capital Asset Management Roles: Maintenance Supervisor*
- *Chapter 22 - Capital Asset Management Roles: Maintenance Technician (Release 9.2 Update)*
- *Chapter 23 - Capital Asset Management Roles: Operations Manager*

**Part VIII: Fulfillment Management Roles** contains the following chapters:

- *Chapter 24 - Fulfillment Management Roles: Fulfillment Manager*
- *Chapter 25 - Fulfillment Management Roles: Additional UX One Components for Fulfillment Management*

**Part IX: General Accounting Roles** contains the following chapters:

- *Chapter 26 - General Accounting Roles: General Accounting Manager (Release 9.2 Update)*
- *Chapter 27 - General Accounting Roles: Additional UX One Components for General Accounting Manager (Release 9.2 Update)*

**Part X: Grower Management Roles** contains the following chapters:

- *Chapter 28 - Grower Management Roles: Crop Manager (Release 9.2 Update)*
- *Chapter 29 - Grower Management Roles: Field Manager (Release 9.2 Update)*

**Part XI: Grower Pricing and Payment Roles** contains the following chapters:

- *Chapter 30 - Grower Pricing and Payment Roles: Grower Contract Manager (Release 9.2 Update)*

**Part XII: Health and Safety Management Roles** contains the following chapters:

- *Chapter 31 - Health and Safety Management Roles: Safety Manager*

**Part XIII: Homebuilder Management Roles** contains the following chapters:

- *Chapter 32 - Homebuilder Management Roles: Lot Start Manager*

**Part XIV: Human Capital Management Roles** contains the following chapters:

- *Chapter 33 - Human Capital Management Roles: Human Resources Manager (Release 9.2 Update)*

**Part XV: Inventory Management Roles** contains the following chapters:

- *Chapter 34 - Inventory Management Roles: Inventory Accounting Manager (Release 9.2 Update)*
- *Chapter 35 - Inventory Management Roles: Inventory Control Manager (Release 9.2 Update)*

**Part XVI: Manufacturing Roles** contains the following chapters:

- *Chapter 36 - Manufacturing Roles: Plant Manager (Release 9.2 Update)*
- *Chapter 37 - Manufacturing Roles: Production Manager (Release 9.2 Update)*
- *Chapter 38 - Manufacturing Roles: Production Scheduler (Release 9.2 Update)*

**Part XVII: Outbound Inventory Management Roles** contains the following chapters:

- *Chapter 39 - Outbound Inventory Management Roles: VMI Account Manager*
- *Chapter 40 - Outbound Inventory Management Roles: VMI Agreement Manager*
- *Chapter 41 - Outbound Inventory Management Roles: Additional UX One Components for Outbound Inventory Management*

**Part XVIII: Payroll Management Roles** contains the following chapters:

- *Chapter 42 - Payroll Management Roles: Payroll Manager*

**Part XIX: Procurement Management Roles** contains the following chapters:

- *Chapter 43 - Procurement Management Roles: Procurement Manager*

- *Chapter 44 - Procurement Management Roles: Strategic Buyer*

**Part XX: Project Management Roles** contains the following chapters:

- *Chapter 45 - Project Management Roles: Project Manager*

**Part XXI: Real Estate Management Roles** contains the following chapters:

- *Chapter 46 - Real Estate Management Roles: Lessee Accounting Manager (Release 9.2 Update)*
- *Chapter 47 - Real Estate Management Roles: Lease Administrator (Release 9.2 Update)*
- *Chapter 48 - Real Estate Management Roles: Property Manager (Release 9.2 Update)*

**Part XXII: Rental Management Roles** contains the following chapters:

- *Chapter 49 - Rental Management Roles: Rental Operations Manager*
- *Chapter 50 - Rental Management Roles: Additional UX One Components for Rental Management*

**Part XXIII: Requisition Self-Service Roles** contains the following chapters:

- *Chapter 51 - Requisition Self-Service Roles: Requisition Manager (Release 9.2 Update)*

**Part XXIV: Sales Order Management Roles** contains the following chapters:

- *Chapter 52 - Sales Order Management Roles: Customer Service Manager*
- *Chapter 53 - Sales Order Management Roles: Customer Service Representative*
- *Chapter 54 - Sales Order Management Roles: Additional UX One Components for Sales Order Management*

**Part XXV: Service Management Roles** contains the following chapters:

- *Chapter 55 - Service Management Roles: Field Service Manager*
- *Chapter 56 - Service Management Roles: Field Service Supervisor*
- *Chapter 57 - Service Management Roles: Service Agent Manager*
- *Chapter 58 - Service Management Roles: Service Contract Manager*
- *Chapter 59 - Service Management Roles: Service Operations Manager*

**Part XXVI: Transportation Management Roles** contains the following chapters:

- *Chapter 60 - Transportation Management Roles: Shipping Supervisor*
- *Chapter 61 - Transportation Management Roles: Transportation Manager*
- *Chapter 62 - Transportation Management Roles: Additional UX One Components for Transportation Management*

**Part XXVII: Warehouse Management Roles** contains the following chapters:

- *Chapter 63 - Warehouse Management Roles: Warehouse Manager*
- *Chapter 64 - Warehouse Management Roles: Additional UX One Components for Warehouse Manager*
- *Appendix A - UX One Inquiry Programs (Release 9.2 Update)*

# Understanding UX One Roles

UX One combines the latest advancements of the JD Edwards EnterpriseOne user experience, centering around the Alert, Analyze, Act design principles. Alert, Analyze, Act enables users to work the way they want and be more efficient.

This guide discusses the role-based solutions that have been created and delivered across the broad portfolio of JD Edwards EnterpriseOne products. Using these solutions, users can sign into the JD Edwards EnterpriseOne system using a specific UX One role, and automatically be presented with pages that display:

- Alerts about information or situations that require immediate attention.
- Data in graphical format to enable users to easily analyze the information that is critical to their job role.
- Tasks on a springboard that provide easy access to the programs and pages users need to be able to quickly act upon the alerts and data they see.

The UX One roles combine the best of JD Edwards EnterpriseOne technologies, which enable end users to work smarter and more efficiently. These include:

- One View Reporting

  Many of the alert and analyze components on the UX One role pages are based on One View Reporting applications.
- Watchlist Alerts

  The alerts on the UX One pages utilize One View Reporting Watchlists to notify users when situations require their attention.
- Page Composer

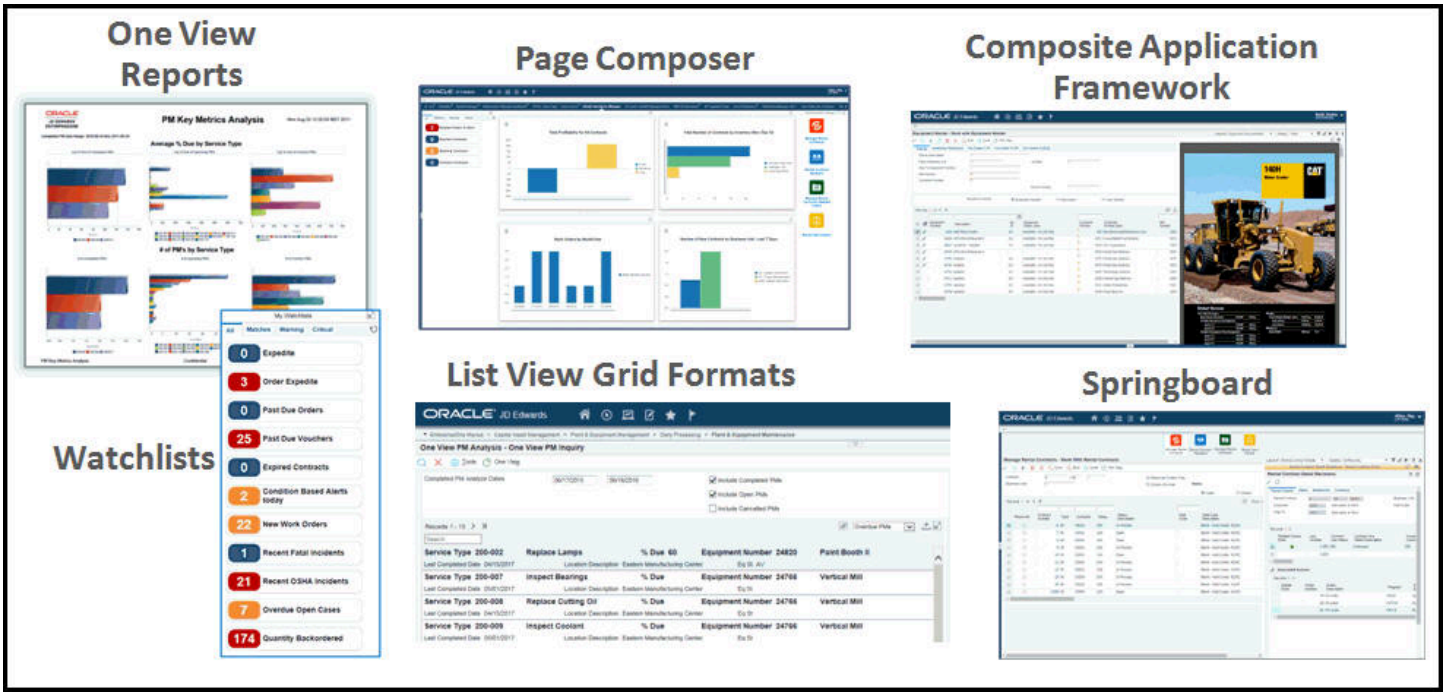
  Page composer functionality is used to create and modify the UX One pages.
- Composite Application Framework form layouts

  Many of the applications that are accessed from the UX One pages included updated form layouts to provide a more efficient user experience.
- JET components

  The analyze components on the UX One pages are created using JET technology. This technology enables the graphical display of EnterpriseOne data.
- List View grid format

  Many of the forms that are accessed from the UX One pages include List View grid formats to enable users to view important information about each displayed record.
- Springboard

  The UX One pages include a springboard that enables users to easily access the applications that they need to complete their job duties.




Additionally, JD Edwards EnterpriseOne has delivered a tool set that enables citizen developers to modify the delivered UX One roles and components, or create new roles and components that meet the requirements of their organization.

For additional information about the components that are included on these role-based pages, how to use them, and how to configure them to meet your needs, see the following topics:

- *JD Edwards EnterpriseOne Tools UX One Deployment and Development Guide*
- *Understanding One View Reporting* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
- *Understanding One View Watchlists* in the *JD Edwards EnterpriseOne Applications One View Watchlists Implemenation Guide* .
- *Composed EnterpriseOne Pages* in the *JD Edwards EnterpriseOne Tools Using and Approving User Defined Objects Guide* .
- *Understanding Content and Layouts* in the *JD Edwards EnterpriseOne Tools Composite Application Framework (CafeOne) User's Guide* .
- *Working With the List View Grid Format* in the *JD Edwards EnterpriseOne Tools Using and Approving User Defined Objects Guide* .
- *Adding a Springboard Pane to a Composed EnterpriseOne Page* in the *JD Edwards EnterpriseOne Tools Using and Approving User Defined Objects Guide* .

# User Defined Objects for UX One

User Defined Objects (UDOs) are web objects that you can create using the JD Edwards EnterpriseOne web interface. You can create them for your own use or share them with other users so that they can view and use them. The JD Edwards EnterpriseOne UX One roles and the associated pages use UDOs, such as queries, One View Watchlists, grid

formats, and personal forms, to deliver an enriched user experience. You can use the delivered UDOs as is, modify them based on your requirements, or use them as examples to create new UDOs.

For the complete list of UDOs that are available for UX One, visit:

*https://support.oracle.com/epmos/faces/DocumentDisplay?id=2227250.1*

# Prerequisites

Before using JD Edwards EnterpriseOne UX One roles, you must ensure that your system is configured to support UX One roles and their associated components.

See *Installing and Configuring UX One* in the *JD Edwards EnterpriseOne Tools UX One Deployment and Development Guide* for additional information and instructions.

Additionally, you must set up users to have access to the UX One roles associated with their job. See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools UX One Deployment and Development Guide* .

# Delivered UX One Roles

This section lists all of the UX One roles that are available for each of the JD Edwards EnterpriseOne products. Additionally, some products have additional UX One components that can be used when creating or customizing UX One pages.

## UX One Roles for Accounts Payable

| Role | Documentation |
|---|---|
| Accounts Payable Manager | *UX One Role: Accounts Payable Manager* |
| Additional Components for Accounts Payable | *Additional UX One Components for Accounts Payable* |

## UX One Roles for Accounts Receivable

| Role | Documentation |
|---|---|
| Accounts Receivable Manager | *UX One Role: Accounts Receivable Manager* |
| Collections Manager | *UX One Role: Collection Manager* |

| Role | Documentation |
| --- | --- |
| Credit Manager | *UX One Role: Credit Manager* |
| Additional Components for Accounts Receivable | *Additional UX One Components for Accounts Receivable* |

# UX One Roles for Advanced Pricing

| Role | Documentation |
| --- | --- |
| Pricing Operations Manager | *UX One Role: Pricing Operations Manager* |
| Procurement Pricing Operations Manager | *UX One Role: Procurement Pricing Operations Manager* |
| Strategic Pricing Manager | *UX One Role: Strategic Pricing Manager* |
| Additional Components for Advanced Pricing | *Additional UX One Components for Advanced Pricing* |

# UX One Roles for Agreement Management

| Role | Documentation |
| --- | --- |
| Procurement Agreement Manager | *UX One Role: Procurement Agreement Manager (Release 9.2 Update)* |
| Sales Agreement Manager | *UX One Role: Sales Agreement Manager (Release 9.2 Update)* |

# UX One Roles for Benefits Management

| Role | Documentation |
| --- | --- |
| Benefits Manager | *UX One Role: Benefits Manager* |

# UX One Roles for Blend Management

| Role | Documentation |
|---|---|
| Wine Cellar Manager | *UX One Role: Wine Cellar Manager (Release 9.2 Update)* |
| Winemaker | *UX One Role: Winemaker (Release 9.2 Update)* |

# UX One Roles for Capital Asset Management

| Role | Documentation |
|---|---|
| Asset Manager | *UX One Role: Asset Manager (Release 9.2 Update)* |
| Maintenance Manager | *UX One Role: Maintenance Manager* |
| Maintenance Scheduler | *UX One Role: Maintenance Scheduler (Release 9.2 Update)* |
| Maintenance Supervisor | *UX One Role: Maintenance Supervisor* |
| Maintenance Technician | *UX One Role: Maintenance Technician (Release 9.2 Update)* |
| Operations Manager | *UX One Role: Operations Manager* |

# UX One Roles for Fulfillment Management

| Role | Documentation |
|---|---|
| Fulfillment Manager | *UX One Role: Fulfillment Manager* |
| Additional Components for Fulfillment Management | *Additional UX One Components for Fulfillment Management* |

# UX One Role for General Accounting

| Role | Documentation |
|---|---|
| General Accounting Manager | *UX One Role: General Accounting Manager (Release 9.2 Update)* |
| Additional Components for General Accounting | *Additional UX One Components for General Accounting Manager (Release 9.2 Update)* |

# UX One Roles for Grower Management

| Role | Documentation |
|---|---|
| Crop Manager | *UX One Role: Crop Manager (Release 9.2 Update)* |
| Field Manager | *UX One Role: Field Manager (Release 9.2 Update)* |

# UX One Roles for Grower Pricing and Payments

| Role | Documentation |
|---|---|
| Grower Contract Manager | *UX One Role: Grower Contract Manager (Release 9.2 Update)* |

# UX One Role for Health and Safety Management

| Role | Documentation |
|---|---|
| Safety Manager | *UX One Role: Safety Manager* |

# UX One Role for Homebuilder Management

| Role | Documentation |
|---|---|
| Lot Start Manager | *UX One Role: Lot Start Manager* |

# UX One Roles for Human Capital Management

| Role | Documentation |
|---|---|
| Human Resources Manager | *UX One Role: Human Resources Manager (Release 9.2 Update)* |

# UX One Roles for Inventory Management

| Role | Documentation |
|---|---|
| Inventory Accounting Manager | *UX One Role: Inventory Accounting Manager (Release 9.2 Update)* |
| Inventory Control Manager | *UX One Role: Inventory Control Manager (Release 9.2 Update)* |

# UX One Roles for Manufacturing Management

| Role | Documentation |
|---|---|
| Plant Manager | *UX One Role: Plant Manager (Release 9.2 Update)* |
| Production Manager | *UX One Role: Production Manager (Release 9.2 Update)* |
| Production Scheduler | *UX One Role: Production Scheduler (Release 9.2 Update)* |

# UX One Roles for Outbound Inventory Management

| Role | Documentation |
|---|---|
| VMI Account Manager | *UX One Role: VMI Account Manager* |
| VMI Agreement Manager | *UX One Role: VMI Agreement Manager* |
| Additional Components for Outbound Inventory Management | *Additional UX One Components for Outbound Inventory Management* |

# UX One Roles for Payroll Management

| Role | Documentation |
|---|---|
| Payroll Manager | *UX One Role: Payroll Manager* |

# UX One Roles for Procurement Management

| Role | Documentation |
|---|---|
| Procurement Manager | *UX One Role: Procurement Manager* |
| Strategic Buyer | *UX One Role: Strategic Buyer* |

# UX One Roles for Project Management

| Role | Documentation |
|---|---|
| Project Manager | *UX One Role: Project Manager* |

# UX One Roles for Real Estate Management

| Role | Documentation |
|---|---|
| Lessee Accounting Manager | *UX One Role: Lessee Accounting Manager (Release 9.2 Update)* |
| Lease Administrator | *UX One Role: Lease Administrator (Release 9.2 Update)* |
| Property Manager | *UX One Role: Property Manager (Release 9.2 Update)* |

# UX One Roles for Rental Management

| Role | Documentation |
|---|---|
| Rental Operations Manager | *UX One Role: Rental Operations Manager* |
| Additional Components for Rental Management | *Additional UX One Components for Rental Management* |

# UX One Roles for Requisition Self-Service

| Role | Documentation |
|---|---|
| Requisition Manager | *UX One Role: Requisition Manager (Release 9.2 Update)* |

# UX One Roles for Sales Order Management

| Role | Documentation |
|---|---|
| Customer Service Manager | *UX One Role: Customer Service Manager* |
| Customer Service Representative | *UX One Role: Customer Service Representative* |

| Role | Documentation |
| --- | --- |
| Additional Components for Sales Order Management | *Additional UX One Components for Sales Order Management* |

# UX One Roles for Service Management

| Role | Documentation |
| --- | --- |
| Field Service Manager | *UX One Role: Field Service Manager* |
| Field Service Supervisor | *UX One Role: Field Service Supervisor* |
| Service Agent Manager | *UX One Role: Service Agent Manager* |
| Service Contract Manager | *UX One Role: Service Contract Manager* |
| Service Operations Manager | *UX One Role: Service Operations Manager* |

# UX One Roles for Transportation Management

| Role | Documentation |
| --- | --- |
| Shipping Supervisor | *UX One Role: Shipping Supervisor* |
| Transportation Manager | *UX One Role: Transportation Manager* |
| Additional Components for Transportation Management | *Additional UX One Components for Transportation Management* |

# UX One Roles for Warehouse Management

| Role | Documentation |
| --- | --- |
| Warehouse Manager | *UX One Role: Warehouse Manager* |

| Role | Documentation |
| --- | --- |
| Additional Components for Warehouse Management | *Additional UX One Components for Warehouse Manager* |

# 2 Understanding UX One Role Navigation

## Understanding UX One Pages

JD Edwards UX One pages implement the Alert, Analyze, and Act model, bringing together the pieces of information that you need in specific job roles. These pages alert you to conditions you need to be aware of, enable you to analyze data to determine appropriate actions, and then provide a direct path to the application and form that you need to use to take those actions.

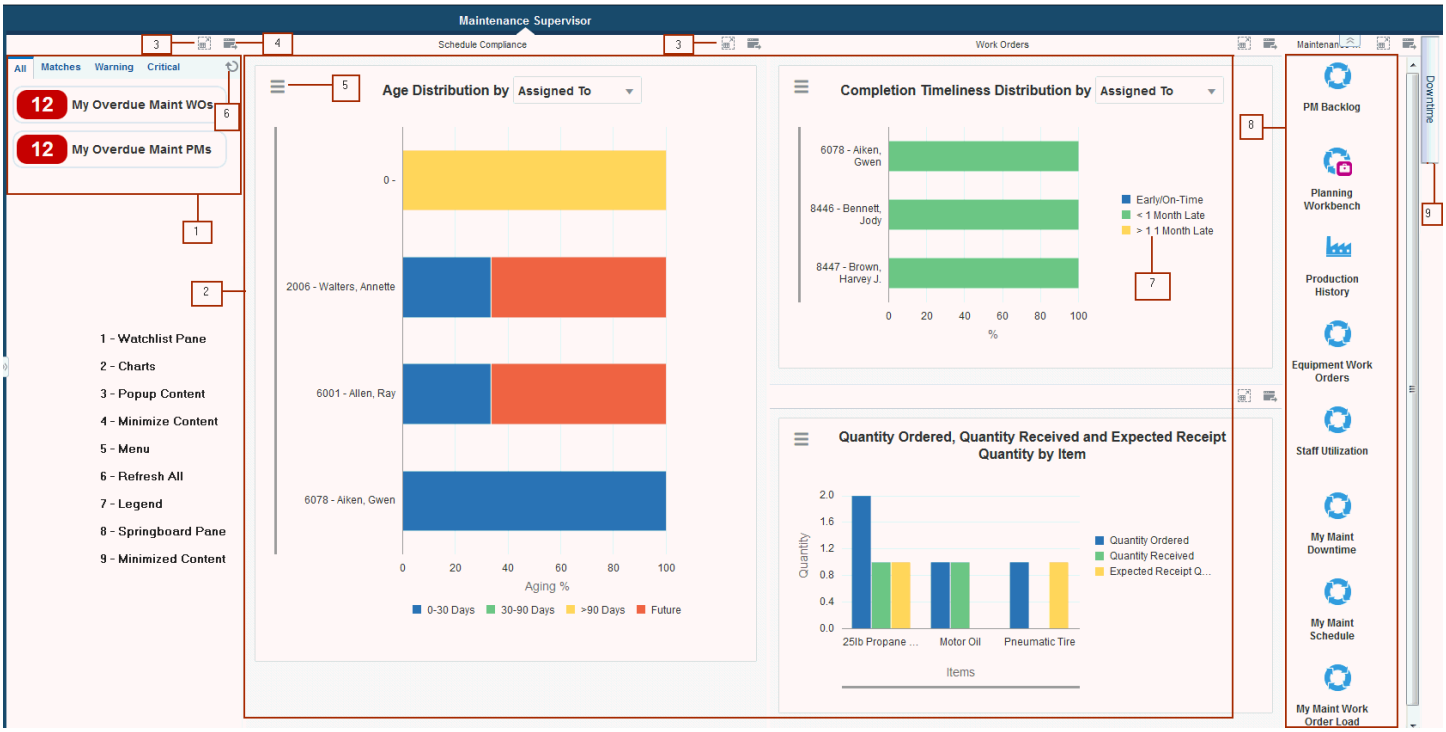
When you log in to JD Edwards EnterpriseOne using a UX One role, you see the UX One pages associated with that role. A UX One page consists of the following components:

- Watchlist pane
- Analyze pane
- Springboard pane

The Watchlist pane contains the alert components. The Analyze pane typically contains charts, which are the analytic components. And the Springboard pane includes tasks that enable you to access applications and act on the data you see.

For example, when a user logs in using the Maintenance Supervisor role (MNTSPVJDE), the system displays the Maintenance Supervisor page (P13001X|W13001XA). This page provides maintenance managers with important equipment-related alerts that require attention and enables users to view a snapshot of important data associated with their team's work-load, schedule compliance, and downtime. The user can quickly access the associated EnterpriseOne applications they need using the tasks included in the Springboard pane.

The following illustration shows a sample UX One page. Each component is identified with a number, and corresponds to the list of the components within the graphic. Use this reference to identify each part of the UX One page:


Maintenance Supervisor
Schedule Compliance
Work Orders
All
Matches
Warning
Critical
12
My Overdue Maint WOs
12
My Overdue Maint PMs
Age Distribution by
Assigned To
0 -
2006 - Walters, Annette
6001 - Allen, Ray
6078 - Aiken, Gwen
0
20
40
60
80
100
Aging %
0-30 Days
30-90 Days
>90 Days
Future
Completion Timeliness Distribution by
Assigned To
6078 - Aiken, Gwen
8446 - Bennett, Jody
8447 - Brown, Harvey J.
Early/On-Time
< 1 Month Late
> 1 1 Month Late
%
Quantity Ordered, Quantity Received and Expected Receipt Quantity by Item
Quantity
2.0
1.6
1.2
0.8
0.4
0.0
25lb Propane ...
Motor Oil
Pneumatic Tire
Items
Quantity Ordered
Quantity Received
Expected Receipt Q...
PM Backlog
Planning Workbench
Production History
Equipment Work Orders
Staff Utilization
My Maint Downtime
My Maint Schedule
My Maint Work Order Load
Downtime
1 - Watchlist Pane
2 - Charts
3 - Popup Content
4 - Minimize Content
5 - Menu
6 - Refresh All
7 - Legend
8 - Springboard Pane
9 - Minimized Content

Only a system administrator can create new UX One pages; users cannot create or modify UX One pages.

# Minimizing, Maximizing, and Resizing Component Frames

Components of the UX One page appear in component frames. The component frame title bar typically shows the title of the component as well as Minimize Content and Pop-Up icons.

You can minimize a component frame to provide more space on the UX One page for the remaining components. To minimize a frame, click the Minimize Content icon displayed on the title bar of the component frame. When you minimize a frame, it appears as a tab on the right-hand side of the UX One page. If the component does not have a title, then the tab displays the component name.

To maximize a minimized frame, click the tab. The frame appears on the UX One page in the original position.

You can resize the component frames that are included on a UX One page. When you resize a frame, the page automatically resizes the adjoining component to fit on the UX One page.

To resize a frame, place your cursor either horizontally or vertically between two frames. When a blue line appears, you can change the size of the frame by moving the line.

# Viewing Components in a Separate Frame

Each component frame title bar includes a Popup Content icon. When you click this icon, the component appears in a separate frame. Click the Restore Content icon to return to the UX One page.

**Note:** If the Popup Content icon is not displayed on the frame, you cannot expand the frame.

# Using the Watchlist Pane

A Watchlist represents a collection of items that match the criteria defined for that Watchlist. The number displayed for that item in the Watchlist pane represents a count of records that meet the query criteria. Watchlists enable you to easily identify when data has exceeded acceptable thresholds. You can use the four filter tabs in the pane to determine which Watchlists display on the page.

The first time you view a UX One page, the EnterpriseOne system updates the Watchlists with the most current information. The update frequency is determined by how the Watchlist is defined. Alternatively, you can use the Refresh icon on an individual Watchlists to refresh it, or you can use the Refresh All icon on the top-right of the Watchlist Pane to refresh all of the Watchlists. You can hover over a Watchlist to view the status and view when the information was last updated.

When you click on a watchlist, the system brings you to an EnterpriseOne program. If there are form layouts or grid formats available, you can select them. Once you select a grid format or form layout, the system remembers your settings, and uses them by default when you sign in to the system.

See *Watchlist Pane at Runtime* in the *JD Edwards EnterpriseOne Tools Using and Approving User Defined Objects Guide* for more information.

# Using the Springboard Pane

A Springboard pane consists of a collection of tasks. The tasks on the Springboard pane can be EnterpriseOne applications, batch programs, ADF applications, and other UX One pages. When you launch a task from the Springboard pane, the system opens the associated application in a separate frame and launches a springboard at the top of the form. If there are form layouts or grid formats available, you can select them. Once you select a grid format or form layout, the system remembers your settings, and uses them by default when you sign into the system.

See *Springboard Pane at Runtime* in the *JD Edwards EnterpriseOne Tools Using and Approving User Defined Objects Guide* for more information.

Before using Springboard panes, you must run the task index build. For more information, see *Working with Task Index Builds* in the *JD Edwards EnterpriseOne Tools Foundation Guide* .

# Using Charts

Charts enable you to view data in a graphical format to help you quickly and easily analyze data that is relevant to your job role. A UX One page displays the charts associated with a specific role. Data visualization in these charts is enabled by Oracle JET (Java Extension Toolkit). Charts use external forms that enable you to directly interact with external applications within the EnterpriseOne web client.

See *Understanding External Forms* in the *JD Edwards EnterpriseOne Tools Form Design Aid Guide* for more information.

Charts improve productivity by providing you with better visibility into operational data as part of your standard daily business process. These charts are based on specific EnterpriseOne applications, and they can be bar (column), line, or pie charts.

To use charts, you build queries to interrogate data on an ad hoc basis. These charts are based on specific EnterpriseOne applications or business views. By default, the charts are set up to render using queries that are based on demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. It is recommended that you review the delivered queries, and use them as a guide when creating new queries for your charts, as queries often include data that is required for the chart to render correctly.

Each chart component displays a title, the menu icon, and Minimize and Popup Content icons. Click the Popup Content icon to expand the chart to view additional details. It is recommended to expand the chart while working on queries.

Hovering over a bar, line, or pie piece in a chart displays information about the data type series, group by value, and data value. Each chart on a UX One page displays a legend on the right side of the chart, listing all of the data types appearing in a chart. This information helps you to identify each data type in the chart. Each data type in the legend is represented by a single color and displays a description of the data type. Hovering over a data type in the legend

highlights the corresponding data in the chart. Clicking a data type in the legend hides the corresponding data in the chart and reformats the chart. You can redisplay the data in the chart by clicking the data type again.

# Refreshing Chart Data (Release 9.2 Update)

When you enable the AIS Server to cache responses of service requests, the data on the charts on a UX One page is retrieved from the cache. The data is retrieved from the cache every time the page or the charts are refreshed until the time interval specified in your AIS configuration settings lapses. After the specified time interval lapses, the system retrieves the data from the database if you refresh the chart data. For example, if you enable AIS caching and set the Read Cache Time To Live (Milliseconds) field value as **180000** milliseconds on the AIS Server, and if you navigate away from a UX One chart and then return to the chart, or change the query for the chart, the system retrieves the chart data from the cache until 180000 milliseconds lapse. Additionally, you can view the date and time when the data was last updated and retrieved from the database, and the refresh interval.

You can click the Refresh icon, displayed on the bottom left of the component frame of each chart, to refresh the chart data by retrieving the data from the database (and not from the cache).

**Note:**

- *"Enabling AIS Cache Responses" in the JD Edwards EnterpriseOne Tools UX One Deployment and Development Guide .*
- *"Enabling Service Request Response Caching" in the JD Edwards EnterpriseOne Application Interface Services Server Reference Guide .*

# Navigating to Base Applications from Charts (Release 9.2 Update)

Some of the charts enable you to navigate to the applications on which the charts are based. You can access the application and then further analyze the data or take any required action. Access the application and view filtered data and metrics by using one of these options:

- Double-click a bar, line, or a pie slice on the chart
- Double-click a legend
- Double-click the bar label in the X-axis or Y-axis
- Click the chart title
- Click the application name in the chart menu
- Click the Details icon in the chart menu

Keep these considerations in mind when you navigate from a chart:

- Static legend: If the chart contains calculated data, you cannot navigate to the application on which the chart is based when you double-click a legend or a bar label in the X-axis or Y-axis.
- Run When Selected: If the Run When Selected option for the query used in the chart is not selected, you must click Find in the application to view the data.
- Default branch/plant: If you set a default branch/plant value in the Default Location and Printers program (P400951), the system may display discrepancies in the data when you access the application from the chart. Therefore, clear the default value from the Branch/Plant field and click Find to view the data.

**Note:** *Click here to view a recording of this feature.*

### Roles with Chart Navigation

The following UX One roles support navigation functionality from charts:

- Accounts Payable Manager
- Accounts Receivable Manager
- Asset Manager
- Benefits Manager
- Collection Manager
- Credit Manager
- Crop Manager
- Customer Service Manager
- Customer Service Representative
- Field Manager
- Field Service Manager
- Field Service Supervisor
- Fulfillment Manager
- General Accounting Manager
- Grower Contract Manager
- Human Resources Manager
- Inventory Accounting Manager
- Inventory Control Manager
- Lease Administrator
- Lessee Accounting Manager
- Maintenance Manager
- Maintenance Scheduler
- Maintenance Supervisor
- Maintenance Technician
- Operations Manager
- Payroll Manager
- Plant Manager
- Pricing Operations Manager
- Procurement Agreement Manager
- Procurement Manager
- Procurement Pricing Operations Manager
- Project Manager
- Property Manager
- Rental Operations Manager
- Safety Manager
- Sales Agreement Manager
- Service Agent Manager

- Service Contract Manager
- Service Operations Manager
- Strategic Buyer
- Strategic Pricing Manager
- VMI Account Manager
- Warehouse Manager
- Wine Cellar Manager
- Winemaker

**Note:** Not all the charts for these roles enable you to access the base applications. For the complete list of charts that support the navigation functionality, see *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2276238.1* .

# Navigating to Context Menu Applications (Release 9.2 Update)

Some of the UX One charts enable you to navigate to related applications from the context menu. For example, you can access the Supplier Master program (P04012) from the context menu of the Cost Analysis by Supplier UX One chart.

You can access context menu applications by using the following options:

- Right-clicking in the white space around a chart.

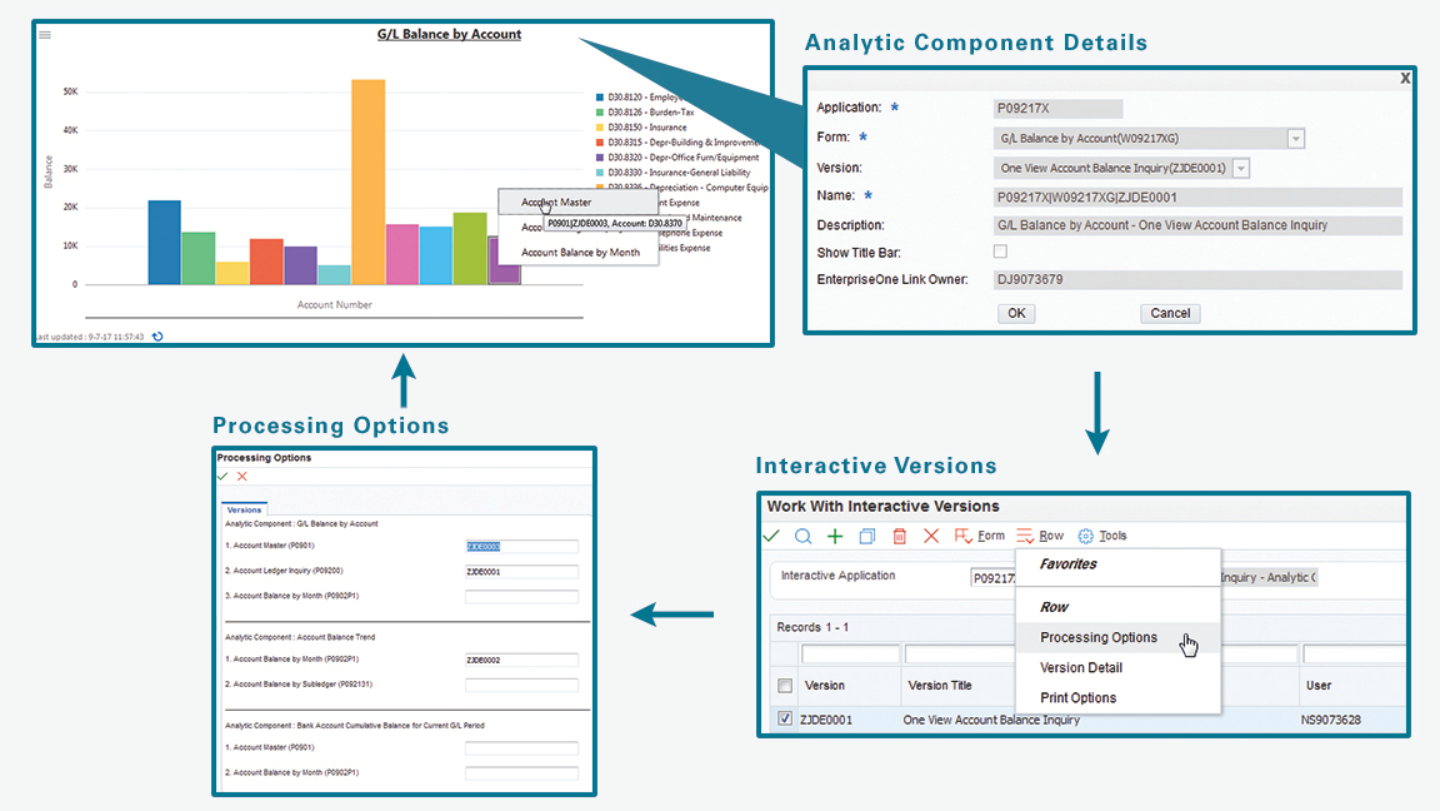
  When you right-click in the white space around a chart, the context menu displays the available programs that you can access. Select the program that you want to access from the menu.

- Right-clicking a chart component, such as a bar, line, or pie slice.

  When you right-click a chart component, the context menu displays the available programs that you can access. When you select a program from the context menu and navigate to that program, you can view information that is filtered by the selected data in the chart component. For example, in the Cost Analysis by Supplier chart, if you right-click a bar related to Actual Extended Cost for a supplier, Custom Brokers, and select Supplier Master from the context menu, the system displays the Work With Supplier Master Browse form. In the Work With Supplier Master Browse form, you can view information that is automatically filtered for Custom Brokers.

  However, when you navigate to the Supplier Master program by right-clicking in the white space around the chart, the system does not apply any filters while displaying the data on the Work With Supplier Master Browse form.

When you hover over the context menu item, you can view the version of the program that is displayed when you access that program. You can set the program version in the processing options for the chart's external application.


G/L Balance by Account
Account Number
Account Master
Account Balance by Month
Analytic Component Details
Application: *
P09217X
Form: *
G/L Balance by Account(W09217XG)
Version:
One View Account Balance Inquiry(ZJDE0001)
Name: *
P09217X|W09217XG|ZJDE0001
Description:
G/L Balance by Account - One View Account Balance Inquiry
Show Title Bar:
EnterpriseOne Link Owner:
DJ9073679
OK
Cancel
Processing Options
Processing Options
Versions
Interactive Versions
Work With Interactive Versions
Form
Row
Tools
Favorites
Row
Processing Options
Version Detail
Print Options
Interactive Application
Records 1 - 1
Version
Version Title
User
ZJDE0001
One View Account Balance Inquiry
NS9073628

**Note:** *Click here to view a recording of this feature.*

# Using the Chart Menu

Each chart displays the Open Menu icon at the top left of the component frame. You can use the Menu to change the data in the chart that the system displays. Click the Open Menu icon to display the menu. The menu displays the name of the EnterpriseOne application or business view on which the queries for the chart are based. Hovering over the name displays the corresponding application ID for application based queries, and form ID and business view object IDs for business view based queries.

(Release 9.2 Update) If a chart supports the navigation functionality, you can click the Open Menu icon and then click the application name in the menu to navigate to the application on which the query for the chart is created. Alternatively, you can click the Details icon at the top left of the component frame to navigate to the application.

The Query drop-down list shows all the personal and shared queries available for that specific application. When you select a query, Version field is automatically populated with the version associated with the query. The version field is disabled. To change the version, you must create and select a query that uses the version you want. When you select All Records from the Query drop-down list, you can choose the version that you want to use.

Some of the charts display the Group by drop-down list that can be used to aggregate the data. Select an item from the Group by drop-down list to view the data for different categories in a single chart. The Group by drop-down list is displayed on the title of the chart as well as in the menu. Note that the system saves the value in the Group by field only if you select the value from the menu. The value is not saved if it is selected from the chart. When you navigate away and return to the UX One page, the chart groups the data as per the menu preference. You can use the Group by option from the chart to override the menu preference.

**Note:** Query and Version drop-down lists are the only common fields in the menu. All the other fields, including the Group by drop-down list are available only in specific charts.

Clicking the Apply icon in the menu saves the menu preferences. The system uses the menu settings to refresh the chart with the new data.

All options in the menu are persisted based on the user and chart instance, and are recalled the next time the chart is rendered. For example, if a UX One page contains two instances of the same chart, each role can configure different queries and menu options for each instance. When a user renders the same UX One page again, the system recalls the specific menu selections for each of the chart instances.

**Note:** If a chart displays a “Query definition is required" message, then you have to either use an existing query or create an ad hoc query.

# Using the Ad hoc Query Builder

You can use the ad hoc query builder to build a query directly from the chart, or to further filter the data in the selected query. To access the ad hoc query builder, click the Filter icon at the top of the menu.

The options for an ad hoc query appear in the query builder panel, and are based on the application or business view associated with the JET application (chart). The ad hoc query builder enables you to select additional fields from the form and grid of the application and add conditions to narrow the data in the chart. When the chart is based on a business view, the query builder panel lists all of the columns available in that business view. You can select and add the required columns to the ad hoc query.

Ad hoc queries enable you to add filters that are more specific than the queries from the application or business view. The system combines the conditions defined in the application query and the ad hoc query to retrieve data.

# Creating an Ad Hoc Query for a UX One Chart

To create an ad hoc query:

1. Open the menu in a chart.
2. Select a personal or shared query from the Query drop-down list.

   > **Note:** You can also select All Records from the Query drop-down list. However, when you select All Records, you must create an ad hoc query; otherwise the chart will display a message: “Query Definition is Required".

3. Click the Filter icon to display the query builder screen.

   The EnterpriseOne form title is displayed at the top of the query builder screen. The left pane lists all the form level and grid level fields you can include in a query. For a query based on a business view, all of the columns available in that business view are listed. The right pane lists the condition of the application query and an additional filter section. You cannot modify the criteria of the Query in the Application Query section.
4. On the left pane, click the plus sign of the form or grid fields that you want to use in your search criteria. The selected fields are added to the Additional Filters section.

   Alternatively, you can search for the field that you want to add in the query by entering the field name in the Search field and clicking the Find button.
5. In the Additional Filters section, select a condition parameter for each field. This enables you to customize the search criteria for the item. The comparison types displayed for each data item (such as equal, not equal, starts with, between, is blank, etc.) depend on the data type.
6. Specify the comparison value for each field in the query. You can specify the value or range of values that you want displayed in the chart.
7. Select Allow Override if you want to override the data that appears for the field. The selected form/grid field appears on the chart. You can enter a value in the field to dynamically filter and view the data in the chart.
8. For the Match Type criteria, select one of the following:
   - Match All: Select this option if you want the chart data to include all of the criteria specified in the query.
   - Match Any: Select this option if you want the chart data to include any (not all) of the criteria specified in the query.
9. Click the Apply button in the query builder panel to run the query.

The system uses the ad hoc query, and refreshes the chart with the new data.

# 3 Accounts Payable Roles: Accounts Payable Manager

## Understanding the Accounts Payable Manager UX One Role

The Accounts Payable Manager role, and the associated UX One pages and components, enable managers to receive important alerts regarding payments, suppliers, and vouchers; analyze payment, supplier, and banking data; view analytic data about the accounts payable team and specific suppliers; and quickly and easily act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Accounts Payable Manager role (APMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the APMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Accounts Payable Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Accounts Payable Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Accounts Payable.*

# Using the Accounts Payable Manager UX One Role

You use the Accounts Payable Manager role to access these UX One pages:

- Accounts Payable Manager (P04001X|W04001XA)
- AP Suppliers (P04001X|W04001XB)
- AP My Team (P04001X|W04001XC)

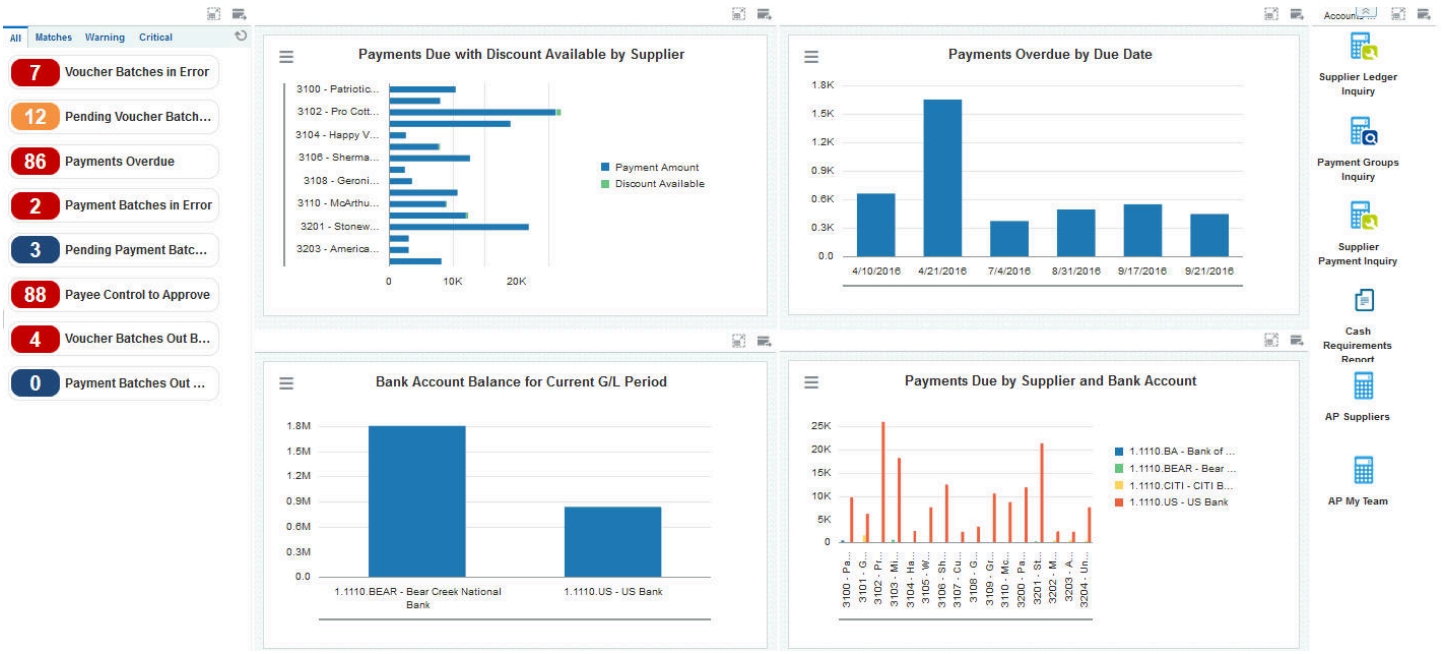
## UX One: Accounts Payable Manager Page

The Accounts Payable Manager page (P04001X|W04001XA) enables users to:

- Receive alerts associated with payments and vouchers.
- Analyze payment, discount, bank account, and supplier data.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Accounts Payable Manager page, log in to the EnterpriseOne system using the Accounts Payable Manager role.

This graphic illustrates the Accounts Payable Manager page:




## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Accounts Payable Manager page:

| Watchlist Alert | Description |
|---|---|
| Voucher Batches in Error | This alert tells users how many vouchers are currently in error.<br><br>This alert is based on the Batches program (P0011, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide*. |
| Pending Voucher Batches | This alert tells users how many voucher batches are currently pending.<br>This alert is based on the Batches program (P0011, version ZJDE0002).<br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br>• Batch Journal Review<br>The following grid format is available:<br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide*. |
| Payments Overdue | This alert tells users when there are overdue payments.<br>This alert is based on the Standard Voucher Entry program (P0411, version ZJDE0018).<br>When you click the alert, the system displays the Supplier Ledger Inquiry form. The following grid format is available:<br>• Summarized Vouchers |
| Payment Batches in Error | This alert tells users when there are any payment batches in error.<br>This alert is based on the Batches program (P0011, version ZJDE0004).<br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br>• Batch Journal Review<br>The following grid format is available:<br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide*. |
| Pending Payment Batches | This alert tells users how many payment batches are currently pending.<br>This alert is based on the Batches program (P0011, version ZJDE0004).<br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br>• Batch Journal Review<br>The following grid format is available:<br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide*. |

| Watchlist Alert | Description |
|---|---|
| Payee Control to Approve | This alert tells users when there are payee control records that are awaiting approval.<br>This alert is based on the Payee Control Review and Approval (P0450).<br>When you click the alert, the system displays the Payee Control Approval form. The following form layout is available:<br>• Payee Control Details<br>The following grid format is available:<br>• Simple |
| Voucher Batches Out of Balance | This alert tells users when there are voucher batches that are out of balance.<br>This alert is based on the Batches Out of Balance program (P007032, version ZJDE0004).<br>When you click the alert, the system displays the Batches Out of Balance form. The following form layout is available:<br>• Batch Out Bal Journal Review<br>The following grid format is available:<br>• Simple |
| Payment Batches Out of Balance | This alert tells users when there are payment batches that are out of balance.<br>This alert is based on the Batches Out of Balance program (P007032, ZJDE0005).<br>When you click the alert, the system displays the Batches Out of Balance form. The following form layout is available:<br>• Batch Out Bal Journal Review<br>The following grid format is available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Payable Implementation Guide* :

- *Processing Accounts Payable Vouchers*
- *Processing Automatic Payments*
- *Processing Manual Payments*
- *Understanding Payee Control*
- *Verifying Data Integrity for Accounts Payable*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Accounts Payable Manager page:

| Component Title | Description |
|---|---|
| Payments Due with Discount Available by Supplier (P042022X\|W042022XF) | Use this chart to view the amount of payments due, by supplier, with discounts.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |
| Payments Overdue by Due Date (P042022X\|W042022XE) | Use this chart to view the amount of payments, by due date, that are currently overdue.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |
| Bank Account Balance for Current G\|L Period (P09217X\|W09217XE) | Use this chart to view the bank balances for the current general ledger period.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217). |
| Payments Due by Supplier and Bank Account (P042022X\|W042022XG) | Use this chart to view the amount of payments, by bank account, that are due to each supplier.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* :

- *One View Supplier Ledger Inquiry (P042022)*
- *One View Account Balance Inquiry (P09217)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Accounts Payable Manager page:

| Task | Description |
|---|---|
| Supplier Ledger Inquiry | Use this task to access the Standard Voucher Entry program (P0411, version ZJDE0001). |
| Payment Groups Inquiry | Use this task to access the Automatic Payment Groups program (P04571, version ZJDE0001) |
| Supplier Payment Inquiry | Use this task to access the Manual Payments program (P0413M, version ZJDE0001). |
| Cash Requirements Report | Use this task to access the Cash Requirements Report program (R04431). The system prompts you to select the version of the report you want to run. |
| AP Suppliers | Use this task to access the AP Suppliers UX One page. |
| AP My Team | Use this task to access the AP My Team UX One page. |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Payable Implementation Guide* :

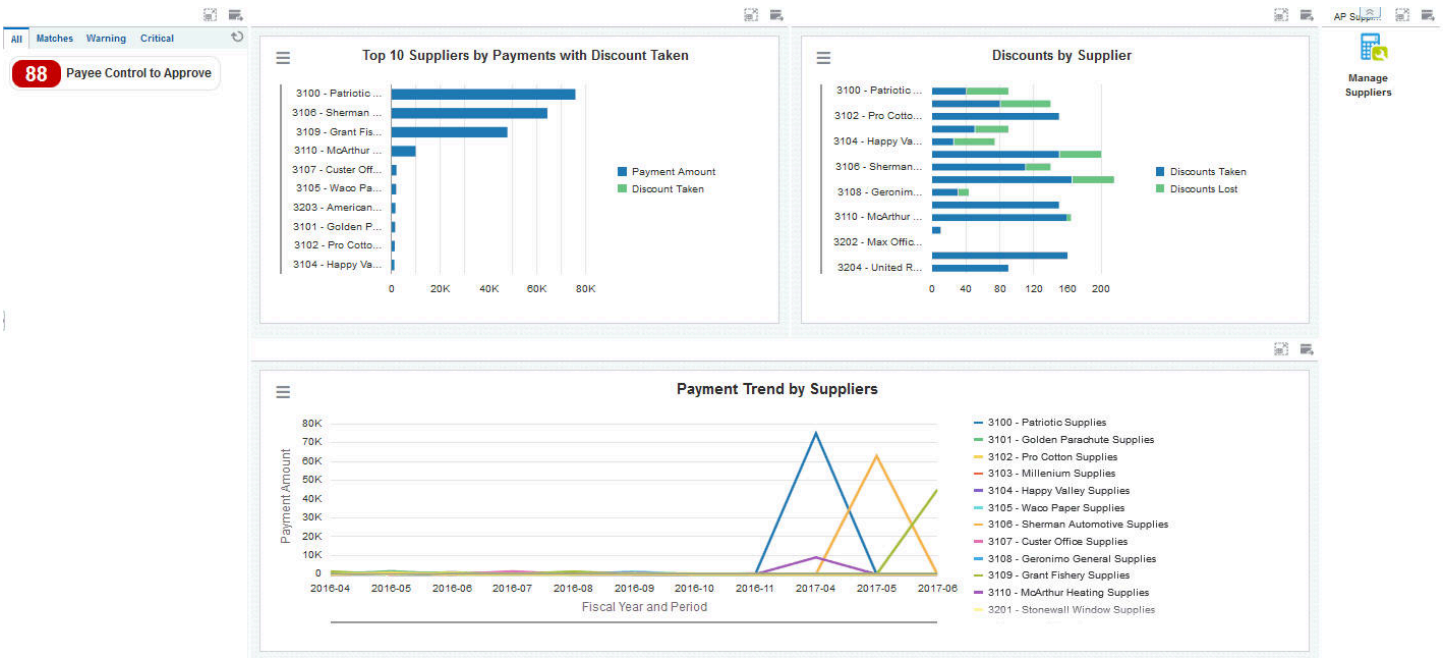
- *Processing Accounts Payable Vouchers*
- *Working With Payment Groups*
- *Processing Manual Payments*
- *Determining Cash Requirements*

# UX One: AP Suppliers Page

The AP Suppliers page (P04001X|W04001XB) enables users to quickly view payment information about the top 10 suppliers, view discounts information for suppliers, and view payment trends. Additionally, the page enables users to receive alerts if there are payee control records awaiting approval, and to easily access applications to manage supplier information.

To access the UX One AP Suppliers page, log in to the EnterpriseOne system using the Accounts Payable Manager role. When you log in with this role, the system automatically displays the Accounts Payable Manager page. Click the AP Suppliers task on the springboard to access the AP Suppliers page.

This graphic illustrates the AP Suppliers page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the AP Suppliers page:

| Watchlist Alert | Description |
|---|---|
| Payee Control to Approve | This alert tells users when there are payee control records that are awaiting approval.<br><br>This alert is based on the Payee Control Review and Approval (P0450).<br><br>When you click the alert, the system displays the Payee Control Approval form. The following form layout is available:<br><br>• Payee Control Details<br>The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |

For additional information about the programs associated with these watchlist alerts, see *Understanding Payee Control* in the *JD Edwards EnterpriseOne Applications Accounts Payable Implementation Guide* :

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the AP Suppliers page:

| Component Title | Description |
|---|---|
| Top 10 Suppliers by Payments with Discount Taken (P04720X\|W04720XE) | Use this chart to view the top 10 suppliers by total payment amount, and also to view the discounts taken by those suppliers.<br><br>This chart is based on the One View Supplier Payment Inquiry program (P04720) |
| Discounts by Supplier (P04720X\|W04720XD) | Use this chart to view the discounts taken and lost by each supplier.<br><br>This chart is based on the One View Supplier Payment Inquiry program (P04720). |
| Payment Trend by Suppliers (P04720X\|W04720XC) | Use this chart to view payment trend information for your suppliers over the course of an extended time period.<br><br>This chart is based on the One View Supplier Payment Inquiry program (P04720). |

For additional information about the programs associated with these charts and graphs, see *One View Supplier Payment Inquiry (P04720)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the AP Suppliers page:

| Task | Description |
|---|---|
| Manage Suppliers | Use this task to access the Supplier Master program (P04012, version ZJDE0001).<br><br>The following form layout is available:<br><br>• Supplier Revision<br>The following grid format is available: |

| Task | Description |
| --- | --- |
| | • Simple |

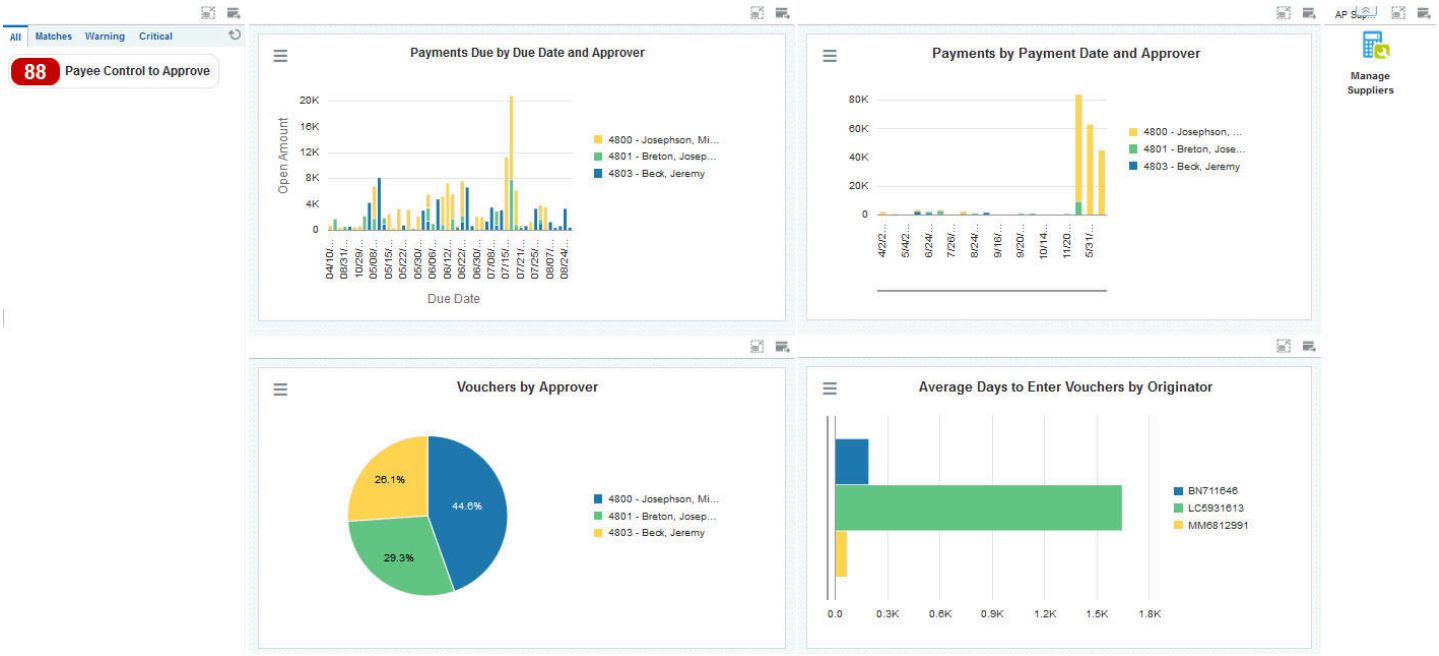
For additional information about the programs accessed by these tasks, see *Entering Supplier Information* in the *JD Edwards EnterpriseOne Applications Accounts Payable Implementation Guide* .

# UX One: AP My Team Page

The AP My Team page (P04001X|W04001XC) enables users to view payment and voucher statistics across the accounts payable team. The page enables users to receive alerts if there are any payee control records to approve, and to easily access programs to manage supplier information.

To access the UX One AP My Team page, log in to the EnterpriseOne system using the Accounts Payable Manager role. When you log in with this role, the system automatically displays the Accounts Payable Manager page. Click the AP My Team task on the springboard to access the AP My Team page.

This graphic illustrates the AP My Team page:



### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the AP My Team page:

| Watchlist Alert | Description |
|---|---|
| Payee Control to Approve | This alert tells users when there are payee control records that are awaiting approval.<br><br>This alert is based on the Payee Control Review and Approval (P0450).<br><br>When you click the alert, the system displays the Payee Control Approval form. The following form layout is available:<br><br>• Payee Control Details<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see *Understanding Payee Control* in the *JD Edwards EnterpriseOne Applications Accounts Payable Implementation Guide* :

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the AP My Team page:

| Component Title | Description |
|---|---|
| Payments Due by Due Date and Approver (P042022X\|W042022XH) | Use this chart to view the payments that are due by due date and approver.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |
| Payments by Payment Date and Approver (P04720X\|W04720XF) | Use this chart to view the payment amounts, by payment date, for each approver.<br><br>This chart is based on the One View Supplier Payment Inquiry program (P04720). |
| Vouchers by Approver (P042022X\|W042022XI) | Use this chart to view the number of vouchers by approver.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |
| Average Days to Enter Vouchers By Originator (P042022X\|W042022XJ) | Use this chart to view the average number of days, by originator, that it takes to enter a voucher.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |

| Component Title | Description |
| --- | --- |
| | |

For additional information about the programs associated with these charts and graphs, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Payable Implementation Guide* :

- *One View Supplier Payment Inquiry (P04720)*
- *One View Supplier Ledger Inquiry (P042022)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the AP My Team page:

| Task | Description |
| --- | --- |
| Manage Suppliers | Use this task to access the Supplier Master program (P04012, version ZJDE0001).<br>The following form layout is available:<br>• Supplier Revision<br>The following grid format is available:<br>• Simple |

For additional information about the programs accessed by these tasks, see *Entering Supplier Information* in the *JD Edwards EnterpriseOne Applications Accounts Payable Implementation Guide* .

# 4 Accounts Payable Roles: Additional UX One Components for Accounts Payable

## Additional UX One Components for Accounts Payable

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own, or customizing existing UX One pages.

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

You can access these charts using Fast Path, by entering the program ID and form ID. For example, enter P1234X|W1234XA in the Fast Path field.

This table lists and describes the charts that are available for Accounts Payable:

| Component Title | Description |
|---|---|
| Top 10 Suppliers by Payments (P04720X\|W04720XB) | Use this chart to view the top 10 suppliers by total payment amounts.<br><br>This chart is based on the One View Supplier Payment Inquiry program (P04720). |
| Open Vouchers by Supplier (P042022X\|W042022XB) | Use this chart to view the number open vouchers by total open amount by supplier.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |
| Discount Available by Discount Due Date (P042022X\|W042022XC) | Use this chart to view discount amounts available by their due dates.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |
| Open and Discount Amount by Business Unit (P042022X\|W042022XD) | Use this chart to view open and discount amounts by business unit.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |
| Payments Due by Business Unit (P042022X\|W042022XA) | Use this chart to view the payments that are currently due by business unit.<br><br>This chart is based on the One View Supplier Ledger Inquiry program (P042022). |
| Discount Taken by Business Unit and Discount Lost by Business Unit (P04720X\|W04720XA) | Use this chart to view discounts lost and taken by business unit.<br><br>This chart is based on the One View Supplier Payment Inquiry program (P04720). |
| Business Unit Trend (P09217X\|W09217XC) | Use this chart to view business unit trends. |

| Component Title | Description |
| --- | --- |
| | This chart is based on the One View Account Balance Inquiry program (P09217). |
| Budget vs Actual by Business Unit (P09217X\|W09217XD) | Use this chart to view budget amounts versus actual amounts by business unit.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217). |

For additional information about the programs associated with these charts, see *One View Reporting for Financial Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# 5 Accounts Receivable Roles: Accounts Receivable Manager

## Understanding the Accounts Receivable Manager UX One Role

The Accounts Receivable Manager role, and the associated UX One pages and components, enable users to view receipt, payor, and credit and collection information for their teams.

The Accounts Receivable Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these roles, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Accounts Receivable Manager role (ARMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the ARMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Accounts Receivable Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Accounts Receivable.*

# Using the Accounts Receivable Manager UX One Role

You use the Accounts Receivable Manager role to access these UX One pages:

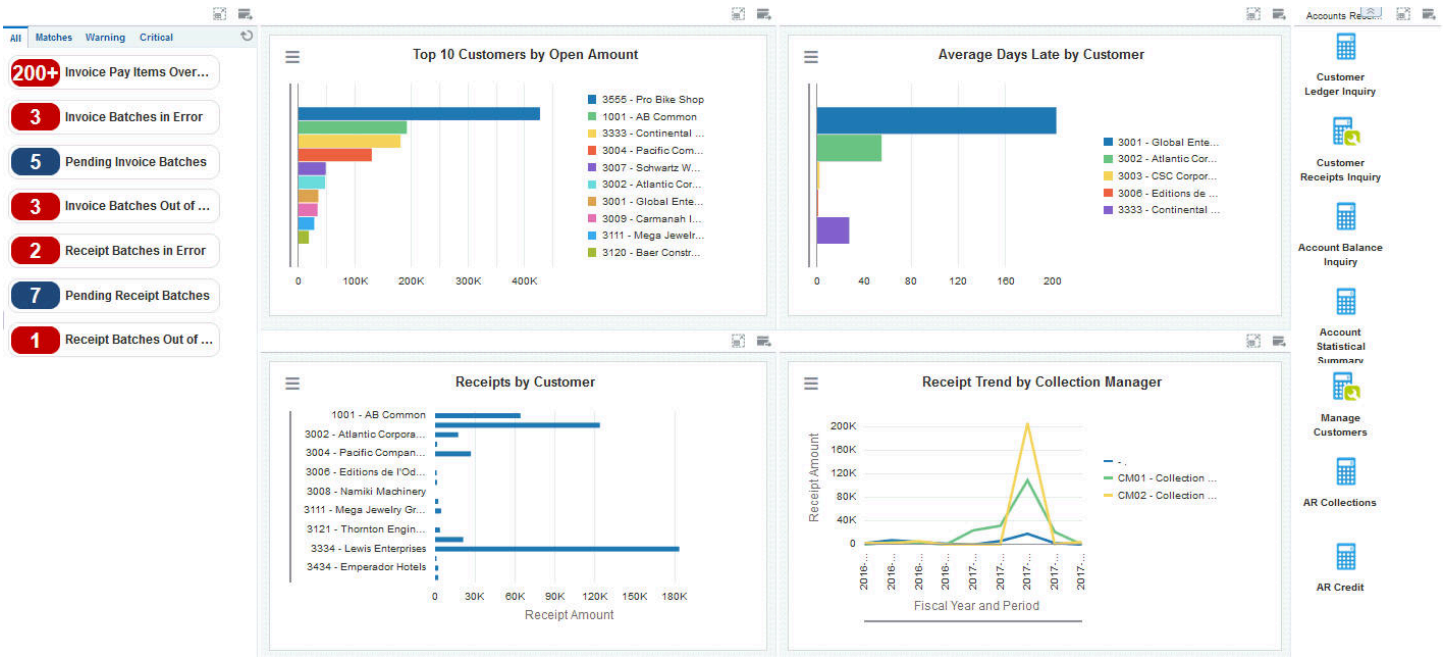
- Accounts Receivable Manager (P03B001X|W03B001XA)
- AR Collections (P03B001X|W03B001XB)
- AR Credit (P03B001X|W03B001XC)

## UX One: Accounts Receivable Manager

The Accounts Receivable Manager page (P03B001X|W03B001XA) enables users to receive alerts about invoices and receipts that need attention, view and analyze receipt and collection data, and access pages and programs that enable them to act on the information they see.

To access the UX One Accounts Receivable Manager page, log in to the EnterpriseOne system using the Accounts Receivable Manager role.

This graphic illustrates the Accounts Receivable Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Accounts Receivable Manager page:

| Watchlist Alert | Description |
|---|---|
| Invoice Pay Items Overdue | This alert tells users when there are pay items overdue.<br><br>This alert is based on the Customer Ledger Inquiry program (P03B2002, version ZJDE0001).<br><br>When you click the alert, the system displays the Work With Customer Ledger Inquiry form. The following grid format is available:<br><br>• Basic |

| Watchlist Alert | Description |
|---|---|
| Invoice Batches in Error | This alert tells users when there are invoice batches that are in error.<br><br>This alert is based on the Batches program (P0011, version ZJDE0005).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Pending Invoice Batches | This alert tells users how many invoice batches are currently pending.<br><br>This alert is based on the Batches program (P0011, version ZJDE0005).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Invoice Batches Out of Balance | This alert tells users how many invoice batches are currently out of balance.<br><br>This alert is based on the Batches Out of Balance program (P007032, version ZJDE0002).<br><br>When you click the alert, the system displays the Batches Out of Balance form. The following form layout is available:<br><br>• Batch Out Bal Journal Review<br>The following grid format is available:<br><br>• Simple |
| Receipt Batches in Error | This alert tells users when there are receipt batches that are in error.<br><br>This alert is based on the Batches program (P0011, version ZJDE0009).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Pending Receipt Batches | This alert tells users how many receipt batches are currently pending. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Batches program (P0011, version ZJDE0009).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Receipt Batches Out of Balance | This alert tells users how many receipt batches are currently out of balance.<br><br>This alert is based on the Batches Out of Balance program (P007032, version ZJDE0003).<br><br>When you click the alert, the system displays the Batches Out of Balance form. The following form layout is available:<br><br>• Batch Out Bal Journal Review<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working With Batches* in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .
- *Understanding Manual Receipts* in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide* .
- *Processing Accounts Receivable Drafts* in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide* .
- *Working with the Batches Out of Balance Program* in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Accounts Receivable Manager page:

| Component Title | Description |
|---|---|
| Top 10 Customers by Open Amount (P03B202X\|W03B202XH) | Use this chart to view the top 10 customers based on their total open receivable amounts.<br><br>This chart is based on the One View Customer Ledger Inquiry program (P03B2022). |

| Component Title | Description |
|---|---|
| Average Days Late by Customer (P03B16X\|W03B16XA) | Use this chart to view the average number of days late each customer is with their payments.<br>This chart is based on the Account Statistics Inquiry program (P03B16). |
| Receipts by Customer (P03B720X\|W03B720XA) | Use this chart to view the total receipt amounts by customer.<br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| Receipt Trend by Collection Manager (P03B720X\|W03B720XF) | Use this chart to view the receipt trends for each collection manager.<br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |

For additional information about the programs associated with these charts, see these topics:

- *One View Customer Ledger Inquiry (P03B2022)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
- *Updating Accounts Receivable Statistics for Customer Analysis* in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide* .
- *One View Customer Receipt/Draft Inquiry (P03B720)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Accounts Receivable Manager page:

| Task | Description |
|---|---|
| Customer Ledger Inquiry | Use this task to access the Customer Ledger Inquiry program (P03B2002, version ZJDE0001)<br>The following grid format is available:<br>• Basic |
| Customer Receipts Inquiry | Use this task to access the Standard Receipt Entry program (P03B102, version ZJDE0001). |
| Account Balance Inquiry | Use this task to access the Account Balance Inquiry program (P03B218). The following form layout is available:<br>• Account Status Summary<br>The following grid format is available:<br>• Simple |
| Account Statistical Summary | Use this task to access the Account Statistics History program (P03B16). |
| Manage Customers | Use this task to access the Customer Master program (P03013, version ZJDE0001). The following form layout is available: |

| Task | Description |
|---|---|
| | • Customer Revision<br>The following grid format is available:<br>• Simple |
| AR Collections | Use this task to access the AR Collections page. |
| AR Credit | Use this task to access the AR Credit page. |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide :*

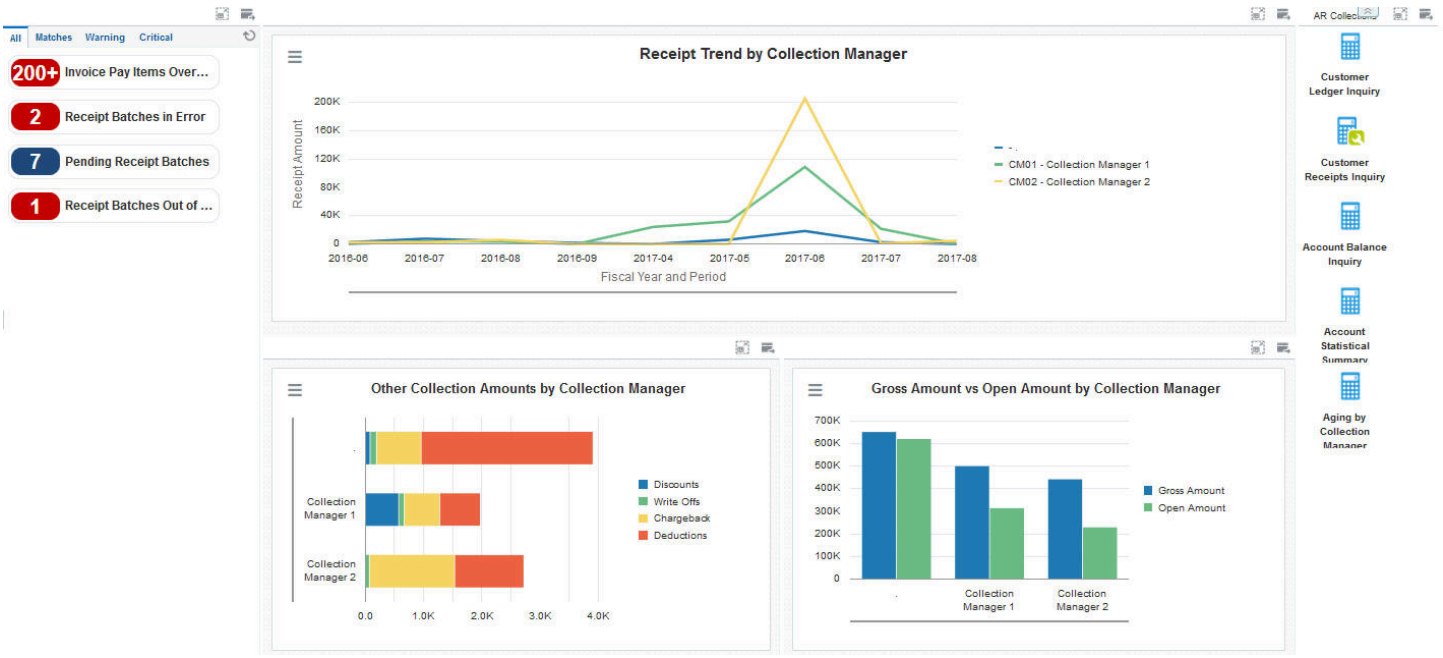
- *Understanding the Customer Ledger Inquiry Program (P03B2002)*
- *Understanding Manual Receipts*
- *Managing Credit and Collections*
- *Updating Accounts Receivable Statistics for Customer Analysis*
- *Setting Up Customer Master Information*

# UX One: AR Collections Page

The AR Collections page (P03B001X|W03B001XB) enables users to view alerts about overdue pay items and receipt batches, analyze statistics by collection manager, and access programs that can be used to act on that information.

To access the UX One AR Collections page, log in to the EnterpriseOne system using the Accounts Receivable Manager role. When you log in with this role, the system automatically displays the Accounts Receivable Manager page. Click the AR Collections task on the springboard to access the AR Collections page.

This graphic illustrates the AR Collections page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the AR Collections page:

| Watchlist Alert | Description |
|---|---|
| Invoice Pay Items Overdue | This alert tells users when there are pay items overdue.<br><br>This alert is based on the Customer Ledger Inquiry program (P03B2002, version ZJDE0001).<br><br>When you click the alert, the system displays the Work With Customer Ledger Inquiry form. The following grid format is available:<br><br>• Basic |

| Watchlist Alert | Description |
|---|---|
| Receipt Batches in Error | This alert tells users when there are receipt batches that are in error.<br><br>This alert is based on the Batches program (P0011, version ZJDE0009).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Pending Receipt Batches | This alert tells users how many receipt batches are currently pending.<br><br>This alert is based on the Batches program (P0011, version ZJDE0009).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Receipt Batches Out of Balance | This alert tells users how many receipt batches are currently out of balance.<br><br>This alert is based on the Batches Out of Balance program (P007032, version ZJDE0003).<br><br>When you click the alert, the system displays the Batches Out of Balance form. The following form layout is available:<br><br>• Batch Out Bal Journal Review<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working With Batches* in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*
- *Understanding Manual Receipts* in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*
- *Working with the Batches Out of Balance Program* in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the AR Collection page:

| Component Title | Description |
|---|---|
| Receipt Trend by Collection Manager (P03B720X\|W03B720XF) | Use this chart to view the receipt trends for each collection manager.<br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| Other Collection Amount by Collection Manager (P03B720X\|W03B720XI) | Use this chart to view discount, write off, chargeback, and deduction amounts by collection manager.<br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| Gross Amount vs Open Amount by Collection Manager (P03B202X\| W03B202XG) | Use this chart to view gross amounts compared to open amounts by collection manager.<br>This chart is based on the One View Customer Ledger Inquiry program (P03B2002). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Customer Ledger Inquiry (P03B2022)*
- *One View Customer Receipt/Draft Inquiry (P03B720)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the AR Collections page:

| Task | Description |
|---|---|
| Customer Ledger Inquiry | Use this task to access the Customer Ledger Inquiry program (P03B2002, version ZJDE0001)<br>The following grid format is available:<br>• Basic |
| Customer Receipts Inquiry | Use this task to access the Standard Receipt Entry program (P03B102, version ZJDE0001). |
| Account Balance Inquiry | Use this task to access the Account Balance Inquiry program (P03B218). The following form layout is available:<br>• Account Status Summary<br>The following grid format is available:<br>• Simple |
| Account Statistical Summary | Use this task to access the Account Statistic History program (P03B16). |

| Task | Description |
| --- | --- |
| Aging by Collection Manager | Use this task to access the Aging by Collection Manager chart (P03B202X\|W03B202XE). |

For additional information about the programs accessed by these tasks, see:

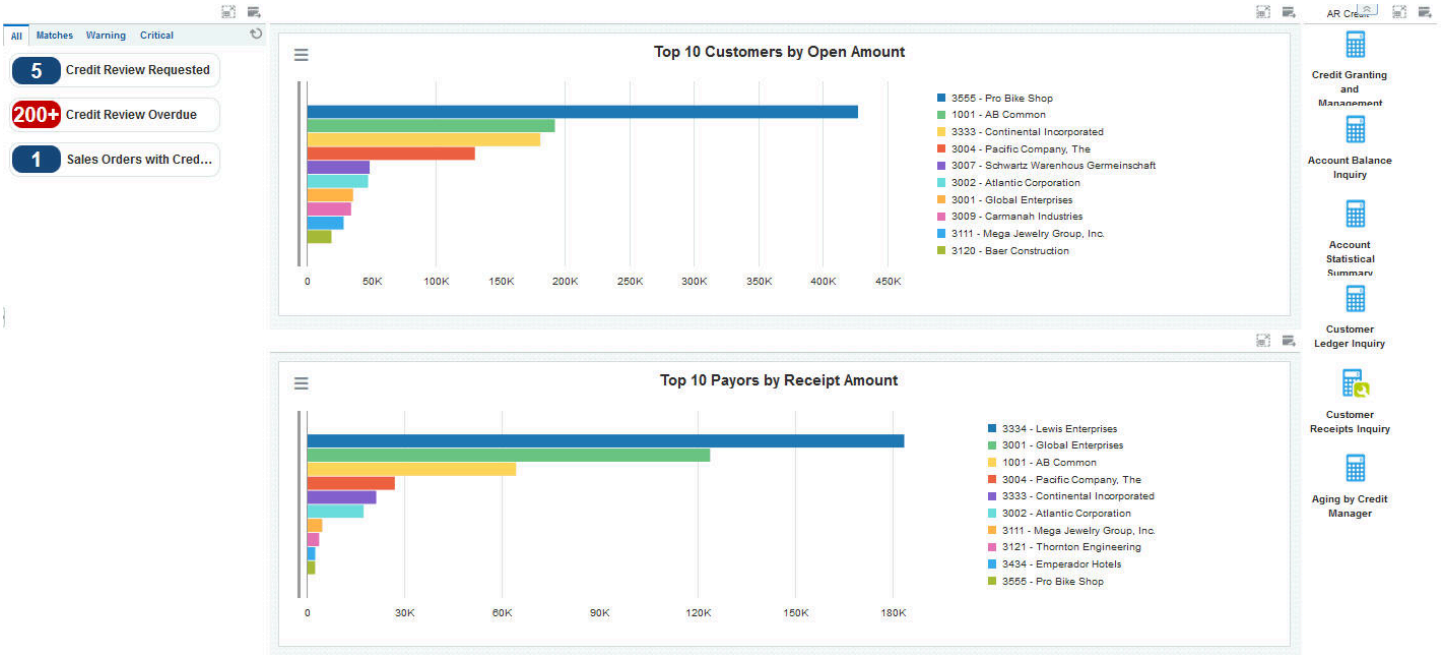
- *Understanding the Customer Ledger Inquiry Program (P03B2002)*
- *Understanding Manual Receipts*
- *Managing Credit and Collections*
- *Updating Accounts Receivable Statistics for Customer Analysis*

# UX One: AR Credit Page

The AR Credit page (P03B001X|W03B001XC) enables users to receive alerts about credit reviews and credit holds on sales orders, analyze credit amounts, and access programs to manage credit information.

To access the UX One AR Credit page, log in to the EnterpriseOne system using the Accounts Receivable Manager role. When you log in with this role, the system automatically displays the Accounts Receivable Manager page. Click the AR Credit task on the springboard to access the AR Credit page.

This graphic illustrates the AR Credit page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the AR Credit page:

| Watchlist Alert | Description |
|---|---|
| Credit Review Requested | This alert tells users when there are open requests for credit reviews.<br><br>This alert is based on the Credit Granting/Management program (P03B305).<br><br>When you click the alert, the system displays the Credit Inquiry form. The following form layout is available:<br><br>• Customer Master Revision<br>The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Credit Review Overdue | This alert tells users when there open credit review requests that are past due.<br>This alert is based on the Credit Granting/Management program (P03B305).<br>When you click the alert, the system displays the Credit Inquiry form. The following form layout is available:<br>• Customer Master Revision<br>The following grid format is available:<br>• Simple |
| Sales Orders with Credit Hold | This alert tells users how many sales orders are currently on hold for credit reasons.<br>This alert is based on the Held Order Release program (P43070, version ZJDE0002).<br>When you click the alert, the system displays the Work With Held Orders form. The following form layout is available:<br>• Credit Check<br>The following grid format is available:<br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *Managing Credit and Collections* in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*
- *Holding, Releasing, and Reviewing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the AR Credit page:

| Component Title | Description |
|---|---|
| Top 10 Customers by Open Amount (P03B720X\|W03B720XH) | Use this chart to view the top 10 customers based on total open amounts.<br>This chart is based on the One View Customer Ledger Inquiry program (P03B2022). |
| Top 10 Payors by Receipt Amount (P03B720X\|W03B720XJ) | Use this chart to view the top 10 payors by total receipt amounts.<br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |

For additional information about the programs associated with these charts, see these topics:

- *One View Customer Ledger Inquiry (P03B2022)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
- *One View Customer Receipt/Draft Inquiry (P03B720)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the AR Credit page:

| Task | Description |
|---|---|
| Credit Granting and Management | Use this task to access the Credit Granting and Management program (P03B305). The following form layout is available:<br>• Customer Master Revision<br>The following grid format is available:<br>• Simple |
| Account Balance Inquiry | Use this task to access the Account Balance Inquiry program (P03B218). The following form layout is available:<br>• Account Status Summary<br>The following grid format is available:<br>• Simple |
| Account Statistical Summary | Use this task to access the Account Statistic History program (P03B16). |
| Customer Ledger Inquiry | Use this task to access the Customer Ledger Inquiry program (P03B2002, version ZJDE0001)<br>The following grid format is available:<br>• Basic |
| Customer Receipts Inquiry | Use this task to access the Standard Receipt Entry program (P03B102, version ZJDE0001). |
| Aging by Credit Manager | Use this task to access the Aging by Credit Manager chart (P03B202X\|W03B202XE). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide:*

- *Reviewing and Revising Credit Information*
- *Understanding the Customer Ledger Inquiry Program (P03B2002)*
- *Understanding Manual Receipts*
- *Managing Credit and Collections*
- *Updating Accounts Receivable Statistics for Customer Analysis*

# 6 Accounts Receivable Roles: Collection Manager

## Understanding the Collection Manager UX One Role

The Collection Manager role, and the associated UX One pages and components, enable users to quickly view important information about invoice trends, overdue receipts, delinquency notices, and customer payments.

The Collection Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Collection Manager role (COLMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the COLMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Collection Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Accounts Receivable.*

# Using the Collection Manager UX One Role

You use the Collection Manager role to access these UX One pages:

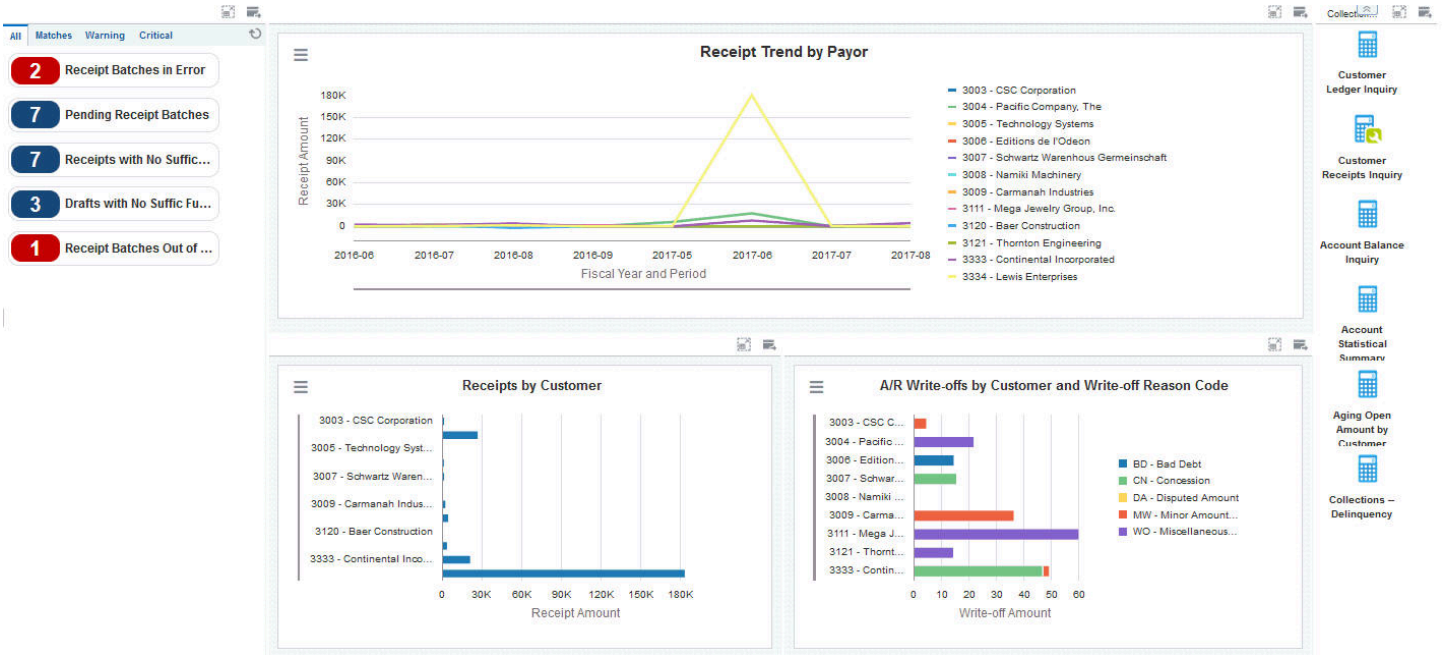
- Collection Manager (P03B002X|W03B002XA)
- Collections - Delinquency (P03B002X|W03B002XB)

## UX One: Collection Manager Page

The Collection Manager page (P03B002X|W03B002XA) enables users to receive alerts about receipts, analyze customer receipts and payment trends, and access frequently used programs.

To access the UX One Collection Manager page, log in to the EnterpriseOne system using the Collection Manager role.

This graphic illustrates the Collection Manager page:




**Watchlist Alerts**

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Collection Manager page:

| Watchlist Alert | Description |
|---|---|
| Receipt Batches in Error | This alert tells users when there are receipt batches that are in error.<br><br>This alert is based on the Batches program (P0011, version ZJDE0009).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Pending Receipt Batches | This alert tells users how many receipt batches are currently pending.<br><br>This alert is based on the Batches program (P0011, version ZJDE0009).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Receipts with No Suffic Funds | This alert tells users how many receipts currently do not have sufficient funds.<br><br>This alert is based on the Standard Receipts Entry program (P03B102, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Customer Receipts Inquiry form. The following grid format is available:<br><br>• Receipts with NSF |
| Drafts with No Suffic Funds | This alert tells users how many drafts currently do not have sufficient funds.<br><br>This alert is based on the Customer Draft Entry program (P03B602, version ZJDE0003).<br><br>When you click the alert, the system displays the Work With Drafts form. The following grid format is available:<br><br>• Drafts with NSF |

| Watchlist Alert | Description |
|---|---|
| Receipt Batches Out of Balance | This alert tells users how many receipt batches are currently out of balance.<br><br>This alert is based on the Batches Out of Balance program (P007032, version ZJDE0003).<br><br>When you click the alert, the system displays the Batches Out of Balance form. The following form layout is available:<br><br>• Batch Out Bal Journal Review<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working With Batches* in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*
- *Understanding Manual Receipts* in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*
- *Processing Accounts Receivable Drafts* in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*
- *Working with the Batches Out of Balance Program* in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Collection Manager page:

| Component Title | Description |
|---|---|
| Receipt Trend by Payor (P03B720X\|W03B720XB) | Use this chart to view receipt amounts by payor over an extended period of time. This view enables you to identify receipt trends.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| Receipts by Customer (P03B720X\|W03B720XA) | Use this chart to view receipt totals by customer.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| A/R Write-offs by Customer and Write-off Reason Code (P03B720X\|W03B720XD) | Use this chart to view the amount of accounts receivable write-offs by customer and reason code.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Customer Ledger Inquiry (P03B2022)*

- *One View Customer Receipt/Draft Inquiry (P03B720)*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Collection Manager page:

| Task | Description |
|---|---|
| Customer Ledger Inquiry | Use this task to access the Customer Ledger Inquiry program (P03B2002, version ZJDE0001)<br>The following grid format is available:<br>• Basic |
| Customer Receipts Inquiry | Use this task to access the Standard Receipt Entry program (P03B102, version ZJDE0001). |
| Account Balance Inquiry | Use this task to access the Account Balance Inquiry program (P03B218).<br>The following form layout is available:<br>• Account Status Inquiry<br>The following grid format is available:<br>• Simple |
| Account Statistical Summary | Use this task to access the Account Statistic History program (P03B16). |
| Aging Open Amounts by Customer | Use this task to access the Aging Open Amounts by Customer chart (P03B202X\|W03B202XA).<br>This chart is based on the One View Customer Ledger Inquiry program (P03B2022). |
| Collections - Delinquency | Use this task to access the Collections - Delinquency UX One page. |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*:

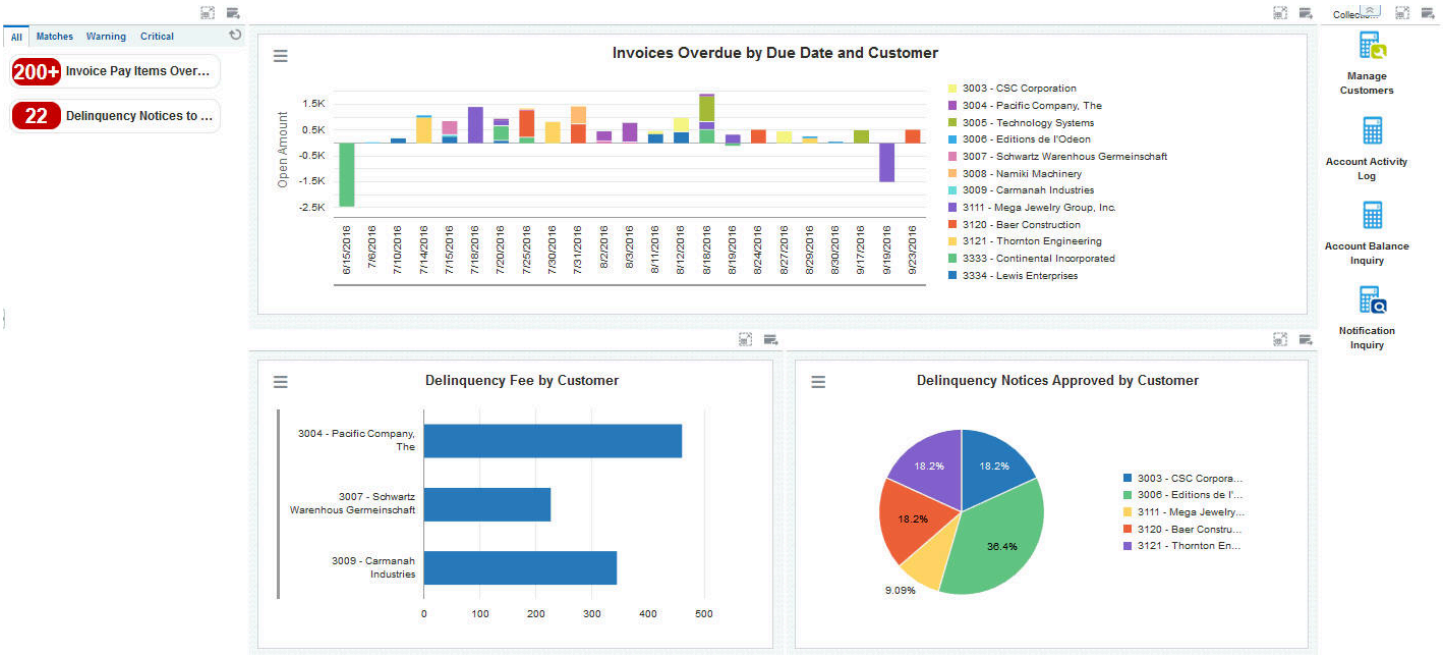
- *Working with Customer Ledger Information*
- *Understanding Manual Receipts*
- *Reviewing Account Information*
- *Analyzing Statistical Information*

# UX One: Collections - Delinquency Page

The UX One Collections - Delinquency page (P03B002X|W03B002XB) enables users to easily view alerts when pay items are overdue or delinquency notices are awaiting approval. The page also provides analytical information about overdue and delinquent customers, and enables users to easily access the programs they need to act on the displayed data.

To access the UX One Collections - Delinquency page, log in to the EnterpriseOne system using the Collection Manager role. When you log in with this role, the system automatically displays the Collection Manager page. Click the Collections - Delinquency task on the springboard to access the Collections - Delinquency page.

This graphic illustrates the Collections - Delinquency page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Collections - Delinquency page:

| Watchlist Alert | Description |
|---|---|
| Invoice Pay Items Overdue | This alert tells users when there are pay items overdue.<br><br>This alert is based on the Customer Ledger Inquiry program (P03B2002, version ZJDE0001). |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the Work With Customer Ledger Inquiry form. The following grid format is available:<br>• Basic |
| Delinquency Notices to Approve | This alert tells users how many delinquency notices are currently awaiting approval.<br>This alert is based on the Delinquency Notification program (P03B201).<br>When you click the alert, the system displays the Work With Delinquency Approval form. The following form layout is available:<br>• Notification Review Detail<br>The following grid format is available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*:

- *Working with Customer Ledger Information*
- *Processing Delinquency Notices and Fees*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Collections - Delinquency page:

| Component Title | Description |
|---|---|
| Invoices Overdue by Due Date and Customer (P03B202X\|W03B202XB) | Use this chart to view the amounts of overdue invoices by customer and due date.<br>This chart is based on the One View Customer Ledger Inquiry program (P03B2022). |
| Delinquency Fee by Customer (P03B22X\|W03B22XA) | Use this chart to view the approved amounts of delinquency fees by customer.<br>This chart is based on the Delinquency Fee Review program (P03B22). |
| Delinquency Notices Approved by Customer (P03B201X\|W03B201XA) | Use this chart to view the number of approved delinquency notices by customer.<br>This chart is based on the Delinquency Notification Review program (P03B201). |

For additional information about the programs associated with these charts, see these topics:

- *One View Customer Ledger Inquiry (P03B2022)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

- *Processing Delinquency Notices and Fees* in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide* .

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Collections - Delinquency page:

| Task | Description |
|---|---|
| Manage Customers | Use this task to access the Customer Master program (P03013, version ZJDE0001).<br>The following form layout is available:<br>• Customer Revision<br>The following grid format is available:<br>• Simple |
| Account Activity Log | Use this task to access the Account Activity Log program (P03B31).<br>The following form layout is available:<br>• Credit Information<br>The following grid format is available:<br>• Simple |
| Account Balance Inquiry | Use this task to access the Account Balance Inquiry program (P03B218).<br>The following form layout is available:<br>• Account Status Summary<br>The following grid format is available:<br>• Simple |
| Notification Inquiry | Use this task to access the Work With Statements program (P03B202, version ZJDE0001). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*:

- *Setting Up Customer Master Information*
- *Managing Accounts for Credit and Collection Activity*
- *Reviewing Account Information*
- *Processing Delinquency Notices and Fees*

# 7 Accounts Receivable Roles: Credit Manager

## Understanding the Credit Manager UX One Role

The Credit Manager role, and the associated UX One pages and components, enable credit managers to receive alerts about outstanding credit requests and issues, receipt batches that need attention, and sales orders on hold for credit reasons. Using this role, credit managers can also review analytical data about their customers, and easily access frequently used programs.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these roles, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Credit Manager role (CRDMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the CRDMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Credit Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Accounts Receivable.*

## Using the Credit Manager UX One Role

You use the Credit Manager role to access this UX One page:

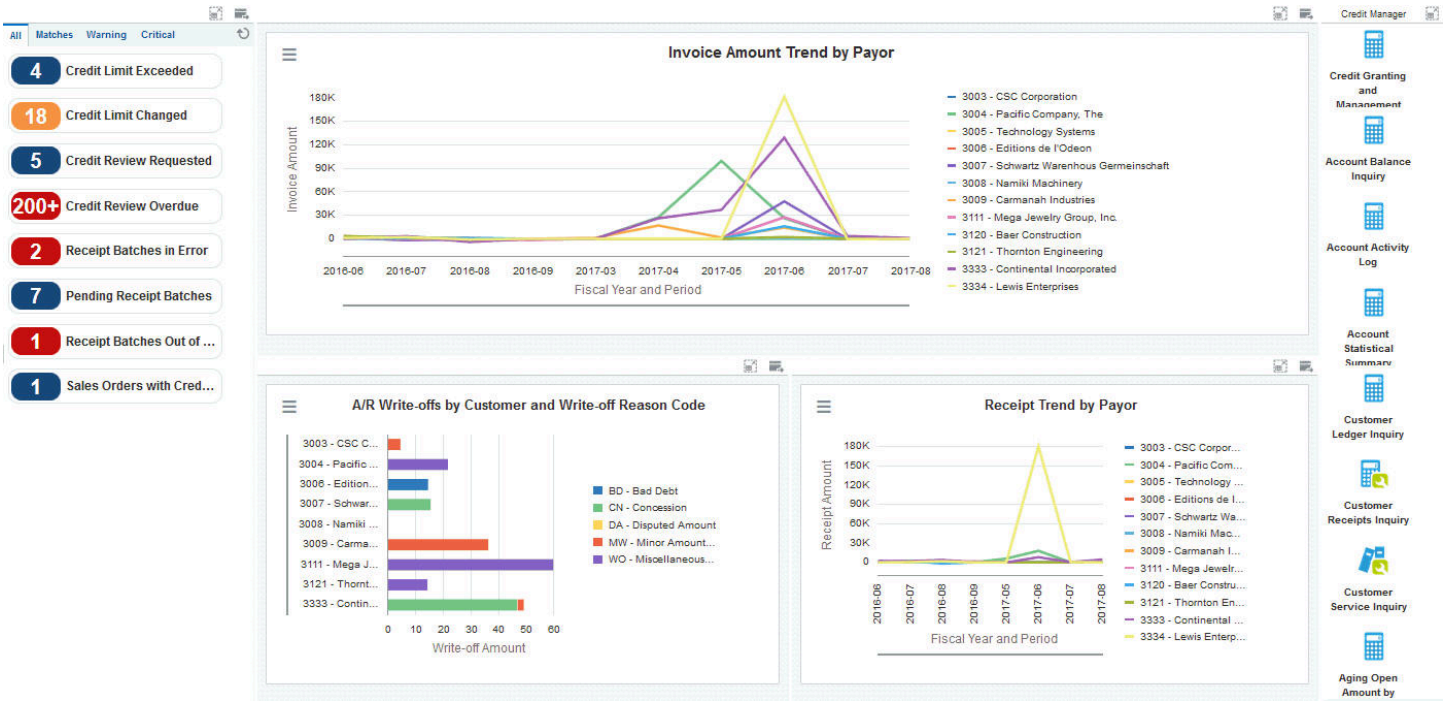
- Credit Manager (P03B003X|W03B003XA)

# UX One: Credit Manager Page

The Credit Manager page (P03B003X|W03B003XA) enables credit managers to receive alerts about outstanding credit requests and issues, receipt batches that need attention, and sales orders on hold for credit reasons. The page also enables credit managers to review analytical data about their customers, and provides easy access to frequently used programs.

To access the UX One Credit Manager page, log in to the EnterpriseOne system using the Credit Manager role.

This graphic illustrates the Credit Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Credit Manager page:

| Watchlist Alert | Description |
|---|---|
| Credit Limit Exceeded | This alert tells users how many customers are currently exceeding their credit limit.<br><br>This alert is based on the Account Balance Inquiry program (P03B218).<br><br>When you click the alert, the system displays the Account Balance Inquiry form. The following form layout is available:<br><br>• Account Status Summary<br>The following grid format is available:<br><br>• Simple |
| Credit Limit Changed | This alert tells users how many customers have had a change to their credit limit.<br><br>This alert is based on the Account Activity Log program (P03B31).<br><br>When you click the alert, the system displays the Account Activity Log form. The following form layout is available:<br><br>• Credit Information<br>The following grid format is available:<br><br>• Simple |
| Credit Review Requested | This alert tells users how many customers are currently awaiting credit review.<br><br>This alert is based on the Credit Granting/Management program (P03B305).<br><br>When you click the alert, the system displays the Credit Inquiry form. The following form layout is available:<br><br>• Customer Master Revision<br>The following grid format is available:<br><br>• Simple |
| Credit Review Overdue | This alert tells users how many customers are currently overdue for a credit review.<br><br>This alert is based on the Credit Granting/Management program (P03B305).<br><br>When you click the alert, the system displays the Credit Inquiry form. The following form layout is available:<br><br>• Customer Master Revision<br>The following grid format is available:<br><br>• Simple |
| Receipt Batches in Error | This alert tells users when there are receipt batches that are in error.<br><br>This alert is based on the Batches program (P0011, version ZJDE0009).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available: |

| Watchlist Alert | Description |
|---|---|
| | • Batch Journal Review<br>The following grid format is available:<br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Pending Receipt Batches | This alert tells users how many receipt batches are currently pending.<br>This alert is based on the Batches program (P0011, version ZJDE0009).<br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br>• Batch Journal Review<br>The following grid format is available:<br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Receipt Batches Out of Balance | This alert tells users how many receipt batches are currently out of balance.<br>This alert is based on the Batches Out of Balance program (P007032, version ZJDE0003).<br>When you click the alert, the system displays the Batches Out of Balance form. The following form layout is available:<br>• Batch Out Bal Journal Review<br>The following grid format is available:<br>• Simple |
| Sales Orders with Credit Hold | This alert tells users how many sales orders are currently being held for credit reasons.<br>This alert is based on the Held Order Release program (P43070, version ZJDE0002).<br>When you click the alert, the system displays the Work With Held Orders form. The following form layout is available:<br>• Credit Check<br>The following grid format is available:<br>• Basic |

For additional information about the programs accessed by these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*:

- *Reviewing Account Information*
- *Managing Accounts for Credit and Collection Activity*
- *Reviewing and Revising Credit Information*
- *Working with Customer Ledger Information*

- *Understanding Manual Receipts*

Additionally, see *Releasing Held Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Credit Manager page:

| Component Title | Description |
|---|---|
| Invoice Amount Trend by Payor (P03B202X\|W03B202XD) | Use this chart to view invoice amount trends by payor for an extended period of time.<br><br>This chart is based on the One View Customer Ledger Inquiry program (P03B2022). |
| A\|R Write-offs by Customer and Write-off Reason Code (P03B720X\|W03B720XD) | Use this chart to view the amount of accounts receivable writer-off amounts by customer and reason code.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| Receipt Trend by Payor (P03B720X\|W03B720XB) | Use this chart to view receipt amounts by payor over an extended period of time. This view enables you to identify receipt trends.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Customer Ledger Inquiry (P03B2022)*
- *One View Customer Receipt/Draft Inquiry (P03B720)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Credit Manager page:

| Task | Description |
|---|---|
| Credit Granting and Management | Use this task to access the Credit Granting/Management program (P03B305). The following form layout is available:<br><br>• Customer Master Revision<br>The following grid format is available:<br><br>• Simple |
| Account Balance Inquiry | Use this task to access the Account Balance Inquiry program (P03B218). |

| Task | Description |
|---|---|
| | The following form layout is available:<br>• Account Status Summary<br>The following grid format is available:<br>• Simple |
| Account Activity Log | Use this task to access the Account Activity Log program (P03B31).<br>The following form layout is available:<br>• Credit Information<br>The following grid format is available:<br>• Simple |
| Account Statistical Summary | Use this task to access the Account Statistic History program (P03B16). |
| Customer Ledger Inquiry | Use this task to access the Customer Ledger Inquiry program (P03B2002, version ZJDE0001). |
| Customer Receipts Inquiry | Use this task to access the Standard Receipt Entry program (P03B102, version ZJDE0001). |
| Customer Service Inquiry | Use this task to access the Sales Order Entry program (P4210, ZJDE0001). |
| Aging Open Amounts by Customer | Use this task to access the Aging Open Amounts by Customer As Of chart (P03B202X\|W03B202XA).<br>This chart is based on the One View Customer Ledger Inquiry program (P03B2022). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Accounts Receivable Implementation Guide*:

- *Reviewing and Revising Credit Information*
- *Working with Customer Ledger Information*
- *Understanding Manual Receipts*
- *Reviewing Account Information*
- *Analyzing Statistical Information*

Additionally, see *Entering Sales Orders for Customer Service Representatives* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

# 8 Accounts Receivable Roles: Additional UX One Components for Accounts Receivable

## Additional UX One Components for Accounts Receivable

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own, or customizing existing UX One pages.

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

You can access these charts using Fast Path, by entering the program ID and form ID. For example, enter P1234X|W1234XA in the Fast Path field.

This table lists and describes the charts that are available for Accounts Receivable:

| Component Title | Description |
|---|---|
| Customers by Collection Manager (P03013X\|W03013XA) | Use this chart to view the number of customers associated with each collection manager in your organization.<br><br>This chart is based on the Customer Master program (P03013). |
| Receipts by Collection Manager (P03B720X\|W03B720XE) | Use this chart to view receipt amounts by collection manager.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| A/R Write Offs by Collection Manager (P03B720X\|W03B720XG) | Use this chart to view the A/R write off amounts by collection manager.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| Other Collection Amounts by Payor (P03B720X\|W03B720XH) | Use this chart to view all collection amounts by payor.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| A/R Write Offs by Customer (P03B720X\|W03B720XC) | Use this chart to view the A/R write off amounts by customer.<br><br>This chart is based on the One View Customer Receipt/Draft Inquiry program (P03B720). |
| Gross Amount vs Open Amount by Period (P03B202X\|W03B202XC) | Use this chart to and compare open amounts and gross amounts by period.<br><br>This chart is based on the One View Customer Ledger Inquiry program (P03B2022). |

| Component Title | Description |
|---|---|
| | |
| Business Unit Trend (P09217X\|W09217XC) | Use this chart to view business unit trends.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217). |
| Budget vs Actual by Business Unit (P09217X\|W09217XD) | Use this chart to view budget amounts versus actual amounts by business unit.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217). |

For additional information about the programs associated with these charts, see *One View Reporting for Financial Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide .*

# 9 Advanced Pricing Roles: Pricing Operations Manager

## Understanding the Pricing Operations Manager UX One Role

The Pricing Operations Manager role, and the associated UX One page and components, enable users to quickly review and manage pricing efficiently and to support and advise management on pricing issues, recommendations, and executing a plan of action. They also enable users to manage the price book on a daily to weekly basis, depending on the nature of the business.

The Pricing Operations Manager page enables users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components that were delivered.
>
> You can use these roles, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Pricing Operations Manager role (PRIOPMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the PRIOPMRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Pricing Operations Manager role, you should have a complete understanding of the components and applications that are accessible form the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* and the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*.

# Using the Pricing Operations Manager UX One Role

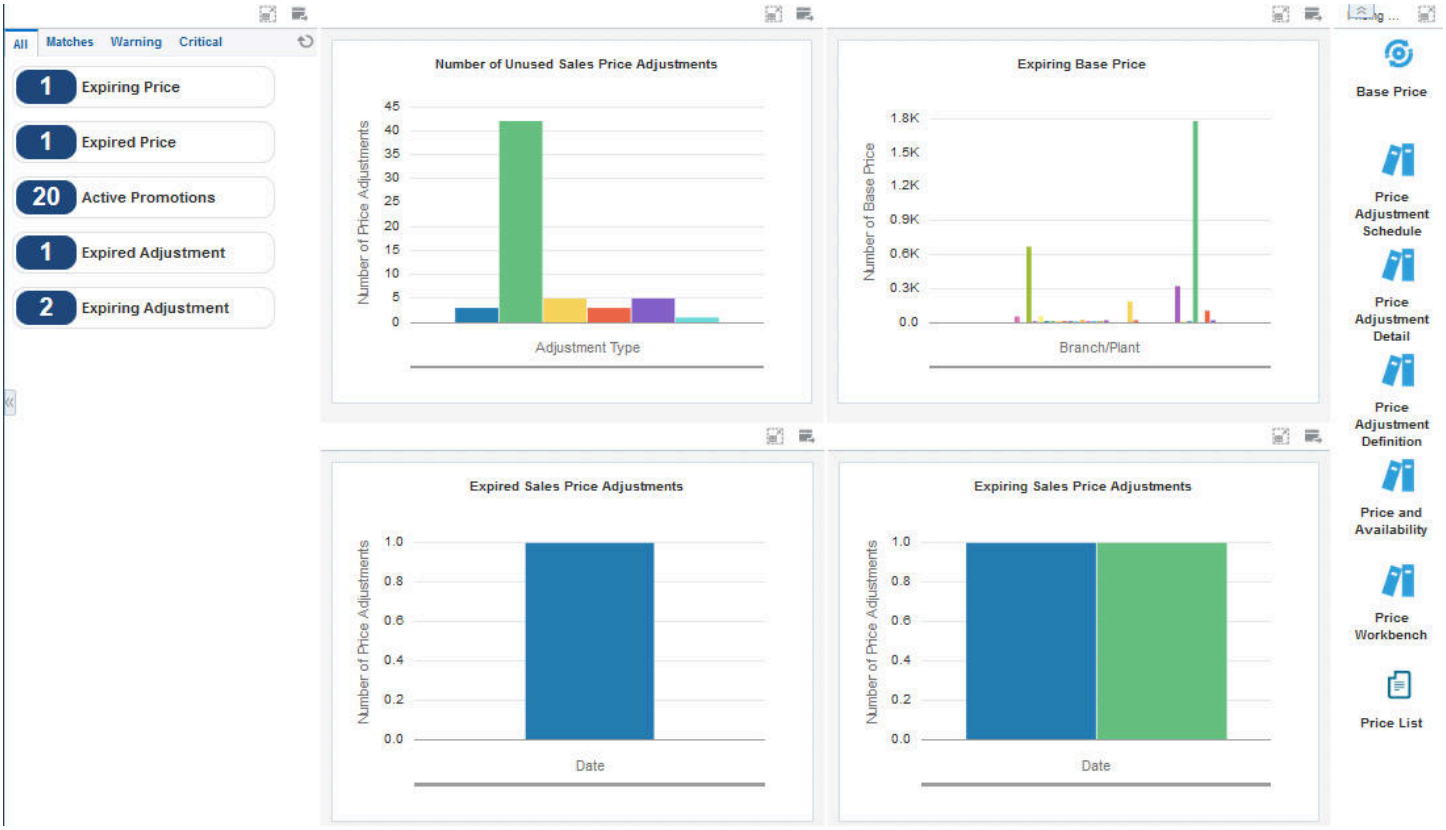
You use the Pricing Operations Manager role to access the UX One Pricing Operations Manager page (P45001X|W45001XA).

## UX One: Pricing Operations Manager Page

The Pricing Operations Manager page (P45001X|W45001XA) enables users to stimulate sales and increase revenue by executing efficient pricing strategies. It enables users to quickly identify non-performing pricing strategies and rearrange them, thus helping them to attain business continuity. Users can also improve order processing by approving price exceptions.

To access the UX One Pricing Operations Manager page, log in to the EnterpriseOne system using the Pricing Operations Manager role.

This graphic illustrates the Pricing Operations Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne program. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query, or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the alerts that are available on the Pricing Operations Manager page:

| Watchlist Alerts | Description |
|---|---|
| Expiring Price | This alert tells users how many prices are about to expire. |

| Watchlist Alerts | Description |
|---|---|
| | This alert is based on the Base Price Revisions program (P4106).<br><br>(Release 9.2 Update) When you click the alert, the system displays the Work with Preference Base Price form. The following grid format is available:<br><br>• Pricing Manager |
| Expired Price | This alert tells users how many prices have expired and need to be renewed.<br><br>This alert is based on the Base Price Revisions program (P4106).<br><br>(Release 9.2 Update) When you click the alert, the system displays the Work with Preference Base Price form. The following grid format is available:<br><br>• Pricing Manager |
| Active Promotions | This alert tells users how many promotions are still active.<br><br>This alert is based on the Promotions Header Revisions program (P40P01).<br><br>(Release 9.2 Update) When you click the alert, the system displays the Work with Promotions form. The following form layout is available:<br><br>• Pricing Manager<br>The following grid format is available:<br><br>• Pricing Manager |
| (Release 9.2 Update) Expired Adjustment | This alert tells users how many adjustments have expired.<br><br>This alert is based on the Price Adjustments Inquiry program (P4080).<br><br>When you click the alert, the system displays the Price Adjustments Inquiry form. The following form layout is available:<br><br>• Pricing Manager Layout<br>The following grid format is available:<br><br>• Pricing Manager |
| (Release 9.2 Update) Expiring Adjustment | This alert tells users how many adjustments will expire soon.<br><br>This alert is based on the Price Adjustments Inquiry program (P4080).<br><br>When you click the alert, the system displays the Price Adjustments Inquiry form. The following form layout is available:<br><br>• Pricing Manager Layout<br>The following grid format is available:<br><br>• Pricing Manager |

For additional information about the programs associated with these watchlist alerts, see:

- *Updating Prices* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

- *Inquiry Programs for Advanced Pricing*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Pricing Operations Manager page:

| Component Title | Description |
|---|---|
| Number of Unused Sales Price Adjustments (P40741X\|W40741XG) | Use this chart to view the number of unused sales price adjustments that are available.<br><br>This chart is based on the Price Adjustment Type business view (V4071).<br><br>Note that the default query for this chart is set on the Price Adjustment Type business view (V4071). If you set any additional query criteria, the chart may display inaccurate data. The system retrieves the total number of price adjustments from the V4071 business view, and the total number of used price adjustments from the Price Adjustment Audit Trail business view (V4074A). To find the number of unused price adjustments, the system uses a special logic to subtract the number of unused price adjustments from the total number of price adjustments. |
| Expiring Base Price (P4106X\|W4106XA) | Use this chart to view the number of base prices per branch/plant that are expiring soon.<br><br>This chart is based on the Base Price Revisions program (P4106). |
| Expired Sales Price Adjustments (P41071X\|W41071XB) | Use this chart to view the number of expired price adjustments by date.<br><br>(Release 9.2 Update) This chart is based on the Price Adjustments Inquiry program (P4080). |
| Expiring Sales Price Adjustments (P41071X\|W41071XC) | Use this chart to view the number of expiring price adjustments by date.<br><br>(Release 9.2 Update) This chart is based on the Price Adjustments Inquiry program (P4080). |

For additional information about the programs associated with these charts, see:

- *Updating Prices* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.
- *Inquiry Programs for Advanced Pricing*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Pricing Operations Manager page:

| Task | Description |
|---|---|
| Base Price | Use this task to access the Base Price Revisions program (P4106).<br><br>The following grid format is available: |

| Task | Description |
|---|---|
| | • Pricing Manager |
| Price Adjustment Schedule | Use this task to access the Price Adjustment Schedule program (P4070, version ZJDE0001). |
| Price Adjustment Detail | Use this task to access the Adjustment Detail Revisions program (P4072, version ZJDE0001). |
| Price Adjustment Definition | Use this task to access the Work with Adjustment Types program (P4071, version ZJDE0001). |
| Price and Availability | Use this task to access the Check Price and Availability program (P4074, version ZJDE0001). |
| Price Workbench | Use this task to access the Pricing Workbench program (P45501). |
| Price List | Use this task to access the Batch Versions program (P98305W) from where you can run the Price List Price Generation program (R45522). |

For additional information about the programs accessed by these tasks, see:

- *Updating Prices* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *Working with Buying Structures* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Working with the Pricing Workbench* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Reviewing Item Information* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *Understanding Advanced Pricing* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Setting Up Base and Standard Pricing* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

# 10 Advanced Pricing Roles: Procurement Pricing Operations Manager

## Understanding the Procurement Pricing Operations Manager UX One Role

The Procurement Pricing Operations Manager role, and the associated UX One pages and components, enable users to easily review supplier prices and price adjustments that are expiring soon. These pages also enable users to quickly act on the data they see in order to streamline the ongoing management of supplier prices and price adjustments in the system.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these roles, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Procurement Pricing Operations Manager role (PRPRIMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the PRPRIMRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Procurement Pricing Operations Manager role, you should have a complete understanding of the components and applications that are accessible from these pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide.*

# Using the Procurement Pricing Operations Manager UX One Role

You use the Procurement Pricing Operations Manager role to access these UX One pages:

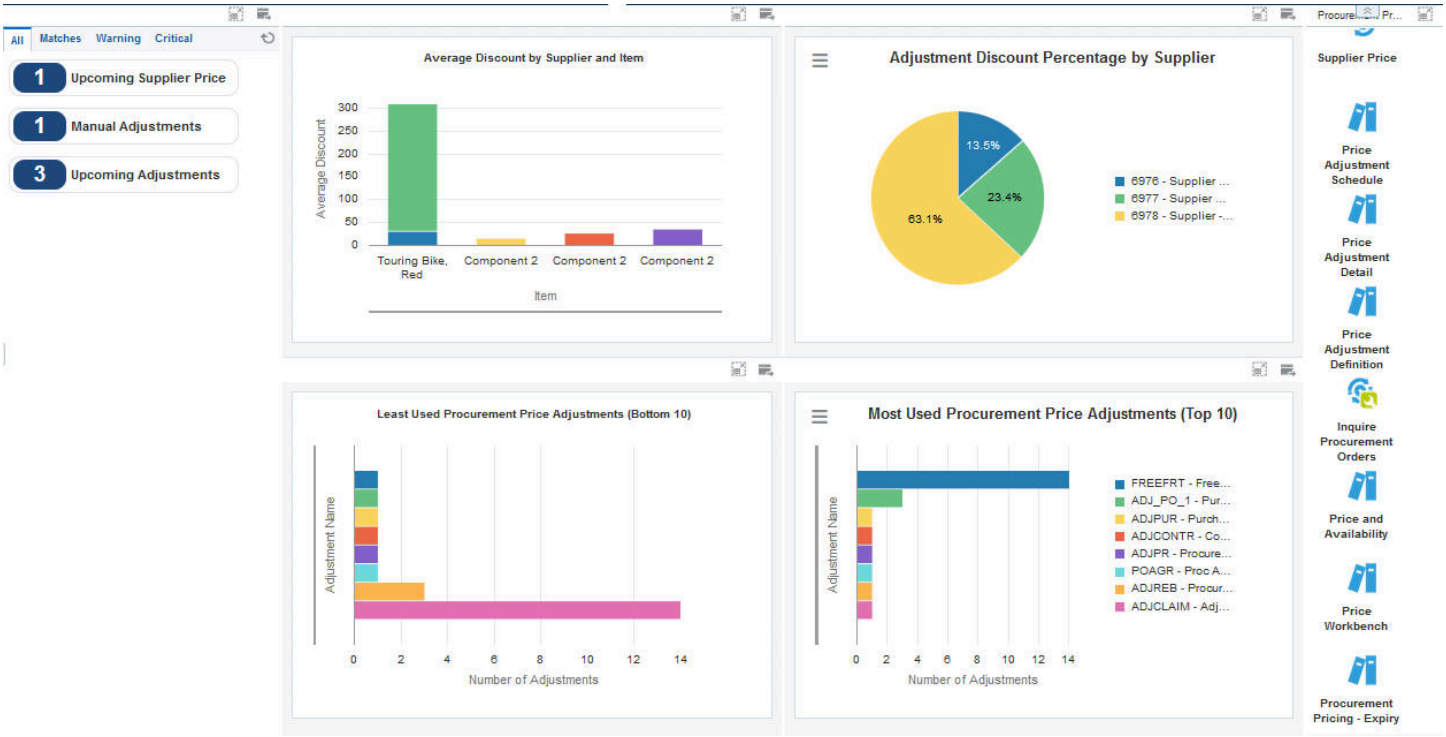
- Procurement Pricing Manager (P45003X|W45003XB)
- Procurement Pricing - Expiry (P45003X|W45003XC)

## UX One: Procurement Pricing Manager Page

The Procurement Pricing Manager page (P45003X|W45003XB) enables users to design and execute flexible pricing to find the right supplier and to control the cost by analyzing the best price in the market. This helps to provide business continuity by quickly identifying the supplier prices that are about to expire.

To access the UX One Procurement Pricing Manager page, log in to the EnterpriseOne system using the Procurement Pricing Operations Manager role.

This graphic illustrates the Procurement Pricing Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne program. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query, or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Procurement Pricing Manager page:

| Watchlist Alert | Description |
|---|---|
| Upcoming Supplier Price | This alert tells users how many supplier prices are expiring soon.<br>This alert is based on the Supplier Catalog Maintenance program (P41061).<br>When you click the alert, the system displays the Work with Supplier Catalogs form. The following form layout is available:<br>• Procurement Pricing Manager<br>The following grid format is available<br>• Procurement Pricing Manager |
| (Release 9.2 Update) Manual Adjustments | This alert tells users how many price adjustments were manually overridden in the recent past.<br>This alert is based on the Price Adjustment Audit Trail Inquiry program (P4081).<br>When you click the alert, the system displays the Price Adjustment Audit Trail Inquiry form. The following form layout is available:<br>• Procurement Pricing Management<br>The following grid format is available:<br>• Pricing Manager |
| (Release 9.2 Update) Upcoming Adjustments | This alert tells users how many price adjustments are coming up soon.<br>This alert is based on the Price Adjustments Inquiry program (P4080).<br>When you click the alert, the system displays the Price Adjustments Inquiry form. The following form layout is available:<br>• Pricing Manager Layout<br>The following grid format is available:<br>• Pricing Manager |

For additional information about the programs associated with these watchlist alerts, see:

- *Defining Supplier Prices and Discount Rules* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide .*
- *Inquiry Programs for Advanced Pricing*

### Charts

These charts are based on JD Edwards EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries are associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Procurement Pricing Manager page:

| Component Title | Description |
|---|---|
| Average Discount By Supplier and Item (P43266X\|W43266XB) | Use this chart to view the average discount by supplier for an item.<br>This chart is based on the One View Supplier Cost Analysis Inquiry program (P43266). |
| Adjustment Discount Percentage by Supplier (P43266X\|W43266XC) | Use this chart to view the adjustment discount percentage by supplier.<br>This chart is based on the One View Supplier Cost Analysis Inquiry program (P43266). |
| Least Used Procurement Price Adjustments (Bottom 10) (P40741X\|W40741XA) | Use this chart to view the ten procurement price adjustments that are used the least.<br>(Release 9.2 Update) This chart is based on the Price Adjustment Audit Trail Inquiry program (P4081). |
| Most Used Procurement Price Adjustments (Top 10) (P40741X\|W40741XB) | Use this chart to view the ten procurement price adjustments that are used the most.<br>(Release 9.2 Update) This chart is based on the Price Adjustment Audit Trail Inquiry program (P4081). |

For additional information about the programs associated with these charts, see:

- *One View Supplier Cost Analysis Inquiry (P43266)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
- *Inquiry Programs for Advanced Pricing*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Procurement Pricing Manager page:

| Task | Description |
|---|---|
| Supplier Price | Use this task to access the Supplier Catalog Maintenance program (P41061, version ZJDE0002).<br>(Release 9.2 Update) The following form layout is available:<br>• Procurement Pricing Manager<br>The following grid format is available:<br>• Procurement Pricing Manager |
| Price Adjustment Schedule | Use this task to access the Price Adjustment Schedule program (P4070, version ZJDE0001). |
| Price Adjustment Detail | Use this task to access the Price Adjustment Detail Revisions program (P4072, version ZJDE0001). |
| Price Adjustment Definition | Use this task to access the Price Adjustment Type program (P4071, version ZJDE0001). |
| Inquire Procurement Orders | Use this task to access the Purchase Orders program (P4310, version ZJDE0001). |
| Price and Availability | Use this task to access the Check Price and Availability program (P4074, version ZJDE0001). |

| Task | Description |
|---|---|
| | |
| Price Workbench | Use this task to access the Pricing Workbench program (P45501). |
| Procurement Pricing - Expiry | Use this task to access the Procurement Pricing - Expiry page (P45003X\|W45003XB). |

For additional information about the programs accessed by these tasks, see:

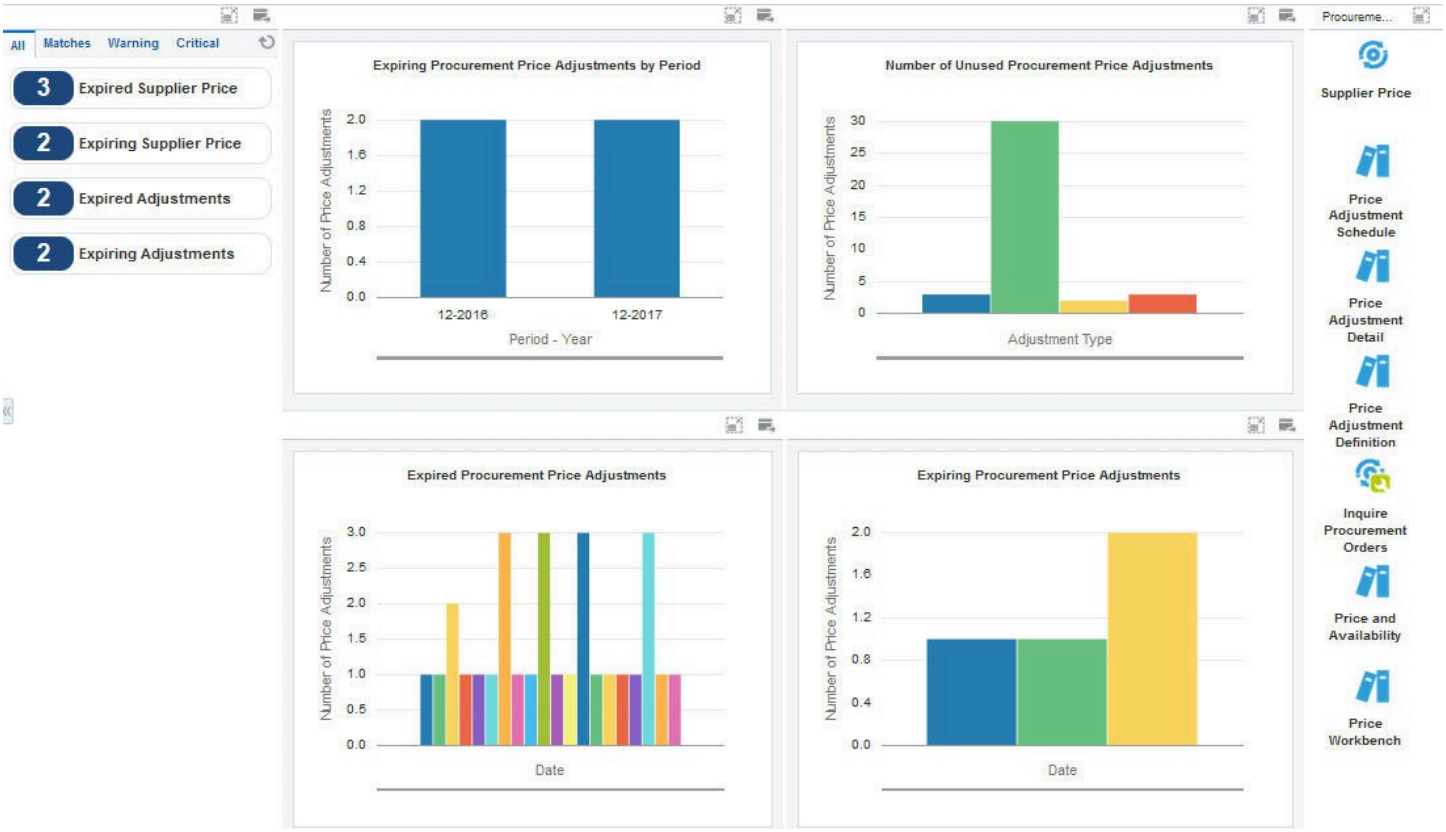
- *Setting Up EnterpriseOne Advanced Pricing* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Working with Pricing* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Working with Additional Adjustments* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Creating Vouchers* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Working with the Pricing Workbench* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Reviewing Item Information* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *Understanding Advanced Pricing* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*

# UX One: Procurement Pricing - Expiry Page

The Procurement Pricing - Expiry page (P45003X|W45003XC) enables users to quickly and easily identify the supplier prices that are about to expire and assist in providing business continuity. The page also helps users to improve the pricing efficiency of the business by correcting pricing strategies that are not utilized.

To access the UX One Procurement Pricing - Expiry page, log in to the JD Edwards EnterpriseOne system using the Procurement Pricing Operations Manager role. When you log in with this role, the system automatically displays the Procurement Pricing Manager page. Click the Procurement Pricing - Expiry task on the springboard to access the Procurement Pricing - Expiry page.

This graphic illustrates the Procurement Pricing - Expiry page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query, or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Procurement Pricing - Expiry page:

| Watchlist Alerts | Description |
|---|---|
| Expired Supplier Price | This alert tells users how many supplier prices have expired. |

| Watchlist Alerts | Description |
|---|---|
| | This alert is based on the Supplier Catalog Maintenance program (P41061).<br><br>When you click the alert, the system displays the Work with Supplier Catalogs form. The following form layout is available:<br><br>• Procurement Pricing Manager<br>The following grid format is available<br><br>• Procurement Pricing Manager |
| Expiring Supplier Price | This alert tells users how many supplier prices are expiring soon.<br><br>This alert is based on the Supplier Catalog Maintenance program (P41061).<br><br>When you click the alert, the system displays the Work with Supplier Catalogs form. The following form layout is available:<br><br>• Procurement Pricing Manager<br>The following grid format is available:<br><br>• Procurement Pricing Manager |
| (Release 9.2 Update) Expired Adjustments | This alert tells users how many price adjustments have expired.<br><br>This alert is based on the Price Adjustments Inquiry program (P4080).<br><br>When you click the alert, the system displays the Price Adjustments Inquiry form. The following form layout is available:<br><br>• Pricing Manager Layout<br>The following grid format is available:<br><br>• Pricing Manager |
| (Release 9.2 Update) Expiring Adjustments | This alert tells users how many price adjustments are expiring soon.<br><br>This alert is based on the Price Adjustments Inquiry program (P4080).<br><br>When you click the alert, the system displays the Price Adjustments Inquiry form. The following form layout is available:<br><br>• Pricing Manager Layout<br>The following grid format is available:<br><br>• Pricing Manager |

For additional information about the programs associated with these watchlist alerts, see:

- *Defining Supplier Prices and Discount Rules* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Inquiry Programs for Advanced Pricing*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Procurement Pricing - Expiry page:

| Component Title | Description |
|---|---|
| Expiring Procurement Price Adjustments by Period (P41071X\|W41071XE) | Use this chart to view the number of expiring price adjustments by period.<br><br>(Release 9.2 Update) This chart is based on the Price Adjustments Inquiry program (P4080). |
| Number of Unused Procurement Price Adjustments (P40741X\|W40741XH) | Use this chart to view the number of unused sales price adjustments that are available.<br><br>This chart is based on the Price Adjustment Type business view (V4071).<br><br>Note that the default query for this chart is set on the Price Adjustment Type business view (V4071). If you set any additional query criteria, the chart might display inaccurate data. The system retrieves the total number of price adjustments from the V4071 business view, and the total number of used price adjustments from the Price Adjustment Audit Trail business view (V4074A). To find the number of unused price adjustments, the system uses a special logic to subtract the number of unused price adjustments from the total number of price adjustments. |
| Expired Procurement Price Adjustments (P41071X\|W41071XF) | Use this chart to view the number of expired procurement price adjustments by date.<br><br>(Release 9.2 Update) This chart is based on the Price Adjustments Inquiry program (P4080). |
| Expiring Procurement Price Adjustments (P41071X\|W41071XG) | Use this chart to view the number of expiring procurement price adjustments by date.<br><br>(Release 9.2 Update) This chart is based on the Price Adjustments Inquiry program (P4080). |

For additional information about the programs associated with these charts, see *Inquiry Programs for Advanced Pricing*.

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Procurement Pricing - Expiry page:

| Task | Description |
|---|---|
| Supplier Price | Use this task to access the Supplier Catalog Maintenance program (P41061, version ZJDE0001).<br><br>(Release 9.2 Update) The following form layout is available:<br><br>• Procurement Pricing Manager<br>The following grid format is available:<br><br>• Procurement Pricing Manager |
| Price Adjustment Schedule | Use this task to access the Price Adjustment Schedule program (P4070, version ZJDE0001). |
| Price Adjustment Detail | Use this task to access the Price Adjustment Detail Revisions program (P4072, version ZJDE0001). |

| Task | Description |
|---|---|
| | |
| Price Adjustment Definition | Use this task to access the Price Adjustment Type program (P4071, version ZJDE0001). |
| Inquire Procurement Orders | Use this task to access the Order Entry program (P4310, version ZJDE0001). |
| Price and Availability | Use this task to access the Check Price and Availability program (P4074, version ZJDE0001). |
| Price Workbench | Use this task to access the Pricing Workbench program (P45501). |

For additional information about the programs accessed by these tasks, see:

- *Setting Up EnterpriseOne Advanced Pricing* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Working with Pricing* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Working with Additional Adjustments* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Creating Vouchers* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Working with the Pricing Workbench* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Reviewing Item Information* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *Understanding Advanced Pricing* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*

# 11 Advanced Pricing Roles: Strategic Pricing Manager

## Understanding the Strategic Pricing Manager UX One Role

Strategic Pricing Managers drive decisions on pricing and valuation of customer behavior. They also lead the development and management of pricing strategies and tactics globally. They are responsible for analyzing and reviewing their company's market performance and competitive position, and formulating pricing strategies and tactics that support revenue, profit margin, and product portfolio objectives.

The Strategic Pricing Manager role, and the associated UX One pages and components, enable users to manage pricing strategies efficiently.

You can use the Strategic Pricing Manager pages to receive important alerts, analyze data regarding promotions and discounts, and access JD Edwards EnterpriseOne applications to perform tasks that require immediate attention.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these roles, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Strategic Pricing Manager role (STPRIMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the STPRIMRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Strategic Pricing Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards*

*EnterpriseOne Applications Advanced Pricing Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Advanced Pricing*.

# Using the Strategic Pricing Manager UX One Role

You use the Strategic Pricing Manager role to access these UX One pages:

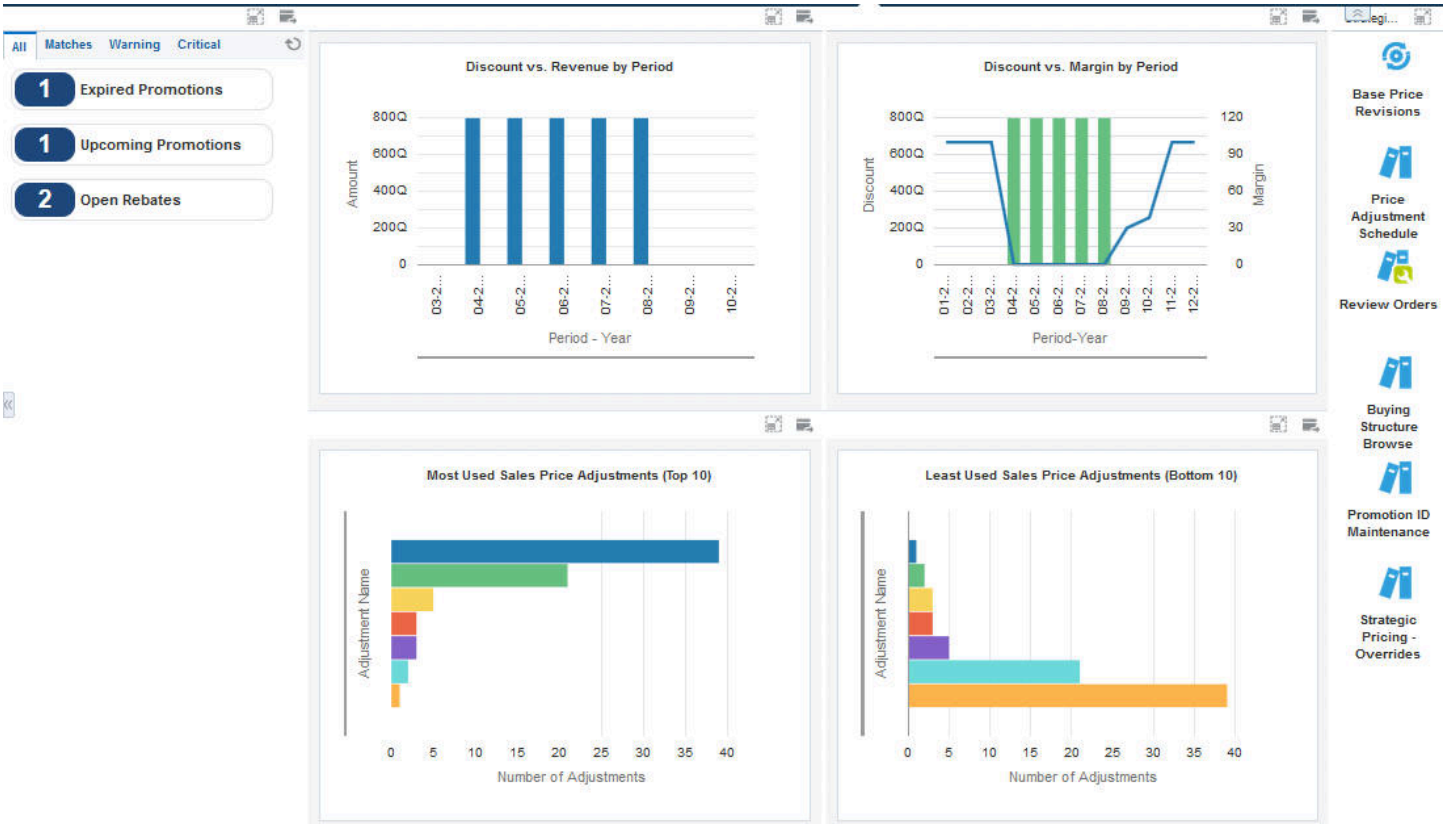
- Strategic Pricing Manager (P45002X|W45002XA)
- Strategic Pricing - Overrides (P45002X|W45002XB)

## UX One: Strategic Pricing Manager Page

The Strategic Pricing Manager page (P45002X|W45002XA) enables you to receive alerts for promotions and rebates, analyze data regarding sales price adjustments and discounts, and access related applications such as the Base Price Revisions program (P4106).

To access the UX One Strategic Pricing Manager page, log in to the EnterpriseOne system using the Strategic Pricing Manager role.

This graphic illustrates the Strategic Pricing Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Strategic Pricing Manager page:

| Watchlist Alert | Description |
|---|---|
| Expired Promotions | This alert displays the number of promotions that expired 15 days ago. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Promotion Header Revisions Application program (P40P01).<br><br>When you click the alert, the system displays the Work with Promotions form. (Release 9.2 Update) The following form layout is available:<br><br>• Pricing Manager<br>The following grid format is available:<br><br>• Pricing Manager |
| Upcoming Promotions | This alert displays the number of promotions that will be effective in the next 15 days.<br><br>This alert is based on the Promotion Header Revisions Application program (P40P01).<br><br>When you click the alert, the system displays the Work with Promotions form. (Release 9.2 Update) The following form layout is available:<br><br>• Pricing Manager<br>The following grid format is available:<br><br>• Pricing Manager |
| Open Rebates | This alert displays the number of open rebates for which the open rebate amount is not equal to zero.<br><br>(Release 9.2 Update) This alert is based on the Rebate Transaction Summary program (P4079).<br><br>When you click the alert, the system displays the Rebate Transaction Summary form. The following form layout is available:<br><br>• Strategic Pricing Manager<br>The following grid format is available:<br><br>• Strategic Pricing Manager |

For additional information about the programs associated with these watchlist alerts, see:

- *Revising Adjustments* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Inquiry Programs for Advanced Pricing*

### Charts

These charts are based on JD Edwards EnterpriseOne programs and business views. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries are associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Strategic Pricing Manager page:

| Component Title | Description |
|---|---|
| Discount vs. Revenue by Period (P42272X\|W42272XC) | Use this chart to view a comparison of the discount and revenue amount for a customer for different periods of time. |

| Component Title | Description |
|---|---|
| | This chart is based on the One View Sales To Date Inquiry - F4211 union F42119 business view (V42272C).<br><br>**Note:** The system considers only the discount and the corresponding revenue, and does not consider the add-on amounts and the corresponding revenue for this chart.<br><br>The default query considers one year's order transaction data and the Order Date is between today and today minus 365 days.<br><br>**Note:** If you are using user-defined Quote Order and Blanket Order order types, you must set your query criteria in such a way that the Quote Order and Blanket Order order types are excluded from the data selection.<br><br>The system uses these formulas to calculate the discount:<br><br>• Standard Discount = List Price x Shipped Quantity – Extended Price<br>• Order Level Discount = Extended Price on the Order Level Price Adjustment Line<br><br>**Note:** When calculating the order level discount, the system excludes the order lines for which the extended price is zero. |
| Discount vs. Margin by Period (P42272X\|W42272XE) | Use this chart to compare the discount and profit margin amount for a customer for different periods of time.<br><br>This chart is based on the One View Sales To Date Inquiry - F4211 union F42119 business view (V42272C).<br><br>The system considers only the discount and the corresponding revenue to calculate the profit margin, and does not consider the add-on amounts and the corresponding revenue for this chart.<br><br>The default query considers one year's order transaction data and the Order Date is between today and today minus 365 days.<br><br>**Note:** If you are using user-defined Quote Order and Blanket Order order types, you must set your query criteria in such a way that the Quote Order and Blanket Order order types are excluded from the data selection.<br><br>The system uses these formulas to calculate the discount:<br><br>• Standard Discount = List Price x Shipped Quantity – Extended Price<br>• Order Level Discount = Extended Price on the Order Level Price Adjustment Line<br><br>When calculating the order level discount, the system excludes the order lines for which the extended price is zero.<br>The system uses these formulas to calculate the margin and gross profit:<br><br>• Margin = Gross profit/sum of extended price x 100<br>• Gross profit = Extended Price – Extended Cost<br><br>Free goods that have a price are also considered for the calculations. |
| Most Used Sales Price Adjustments (Top 10) (P40741X\|W40741XD) | Use this chart to view the 10 most frequently used sales price adjustments and the number of times the sales price adjustments are used.<br><br>(Release 9.2 Update) This chart is based on the Price Adjustment Audit Trail Inquiry program (P4081). |
| Least Used Sales Price Adjustments (Bottom 10) (P40741X\|W40741XC) | Use this chart to view the 10 least frequently used sales price adjustments and the number of times the sales price adjustments are used. |

| Component Title | Description |
|---|---|
| | (Release 9.2 Update) This chart is based on the Price Adjustment Audit Trail Inquiry program (P4081). |

For additional information about the programs associated with these charts, see:

- *Revising Adjustments* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Inquiry Programs for Advanced Pricing*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Strategic Pricing Manager page:

| Task | Description |
|---|---|
| Base Price Revisions | Use this task to access the Base Price Revisions program (P4106). |
| Price Adjustment Schedule | Use this task to access the Price Adjustment Schedule program (P4070, version ZJDE0003).<br>The following form layout is available:<br>• Strategic Pricing Manager<br>The following grid format is available:<br>• Strategic Pricing Manager |
| Review Orders | Use this task to access the Sales Order Entry program (P42101, version ZJDE0019).<br>The following form layout is available:<br>• StrategicPricingManager_Review<br>The following grid format is available:<br>• StrategicPricing_OrderReview |
| Buying Structure Browse | Use this task to access the Buying Structure Browse program (P450150). |
| Promotion ID Maintenance | Use this task to access the Promotion ID Maintenance program (P40P03). |
| Strategic Pricing - Overrides | Use this task to access the Strategic Pricing - Overrides page (P45002X\|W45002XB). |

For additional information about the programs accessed by these tasks, see:

- *Setting Up Base Prices* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Creating Direct Price Adjustments* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*

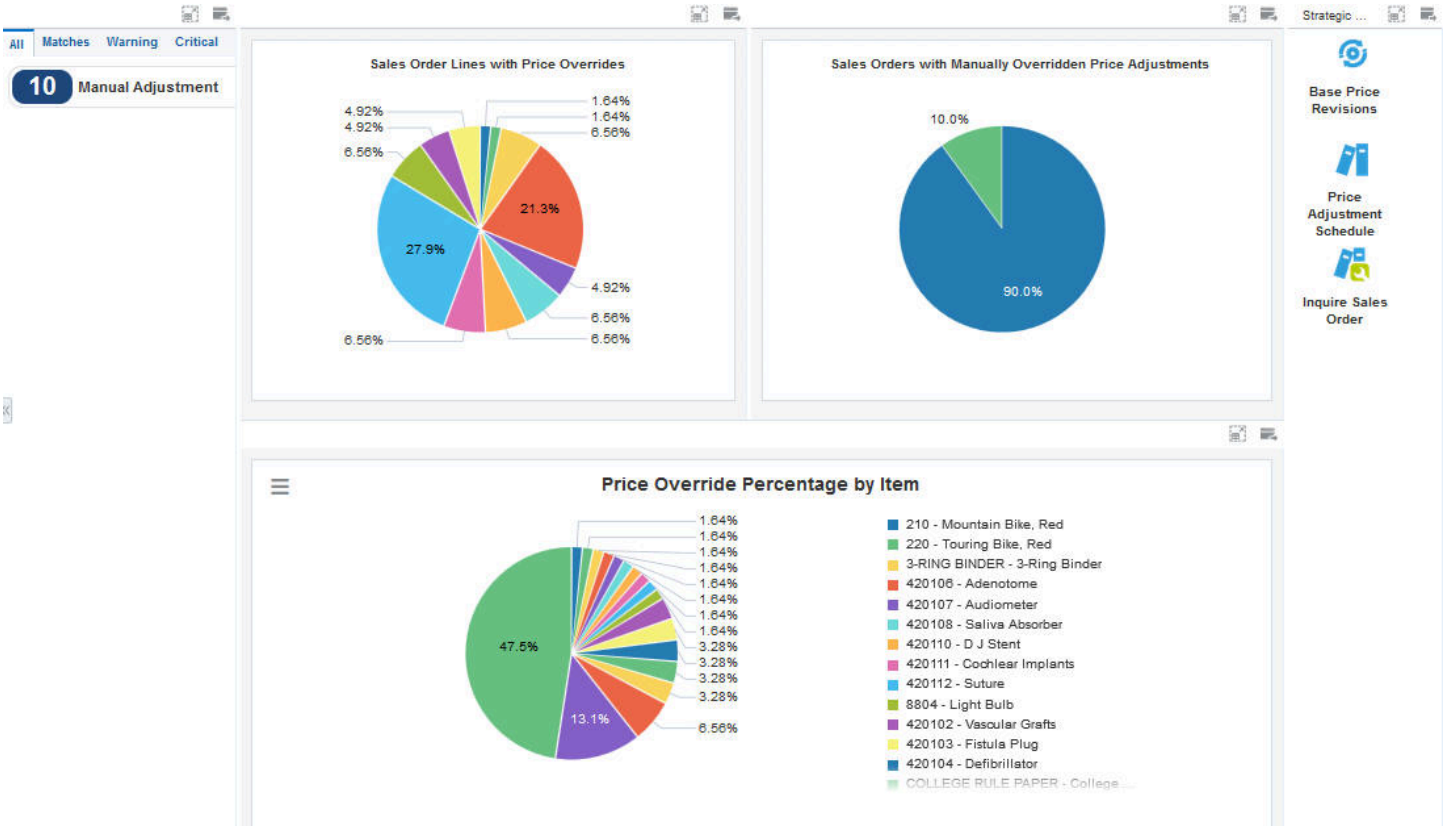
- *Entering Sales Order Header and Detail Information* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *Reviewing and Revising Buying Structures* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Entering and Updating Promotion Information* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*

# UX One: Strategic Pricing - Overrides Page

The Strategic Pricing - Overrides page (P45002X|W45002XB) enables you to analyze data regarding price overrides and price adjustments. Additionally, you can access related applications to perform tasks that require immediate attention such as the Price Adjustment Schedule program (P4070).

To access the UX One Strategic Pricing - Overrides page, log in to the EnterpriseOne system using the Strategic Pricing Manager role. When you log in with this role, the system automatically displays the Strategic Pricing Manager page. Click the Strategic Pricing - Overrides task on the springboard to access the Strategic Pricing - Overrides page.

This graphic illustrates the Strategic Pricing - Overrides page:




### (Release 9.2 Update) Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Strategic Pricing - Overrides page:

| Watchlist Alert | Description |
|---|---|
| Manual Adjustment | This alert displays the number of price adjustments that were manually overridden in the recent past. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Price Adjustment Audit Trail Inquiry program (P4081).<br><br>When you click the alert, the system displays the Price Adjustment Audit Trail Inquiry form. The following form layout is available:<br><br>• Strategic Pricing Manager<br>The following grid format is available:<br><br>• Pricing Manager |

For additional information about the program associated with this watchlist alert, see *Inquiry Programs for Advanced Pricing*.

### Charts

These charts are based on EnterpriseOne programs and business views. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries are associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Strategic Pricing - Overrides page:

| Component Title | Description |
|---|---|
| Sales Order Lines with Price Overrides (P42272X\|W42272XB) | Use this chart to view the percentage of sales order lines that have overridden prices for different periods of time.<br><br>This chart is based on the One View Sales To Date Inquiry - F4211 union F42119 business view (V42272C). |
| Sales Orders with Manually Overridden Price Adjustments (P40741X\|W40741XE) | Use this chart to view the percentage of sales order lines with manually overridden price adjustments for different periods of time.<br><br>This chart is based on the Price Adjustment Audit Trail Inquiry program (P4081). |
| Price Override Percentage by Item (P42272X\|W42272XA) | Use this chart to view the percentage of price overrides for different items.<br><br>This chart is based on the One View Sales To Date Inquiry - F4211 union F42119 business view (V42272C). |

For additional information about the programs associated with these charts, see:

- *Entering Sales Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *Working with Schedules and Adjustments* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Inquiry Programs for Advanced Pricing*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Strategic Price - Overrides page:

| Task | Description |
|---|---|
| Base Price Revisions | Use this task to access the Base Price Revisions program (P4106). |
| Price Adjustment Schedule | Use this task to access the Price Adjustment Schedule program (P4070, version ZJDE0001).<br>The following form layout is available:<br>• Strategic Pricing Manager<br>The following grid format is available:<br>• Strategic Pricing Manager |
| Inquire Sales Order | Use this task to access the Sales Order Entry program (P42101, version ZJDE0019).<br>The following form layout is available:<br>• StrategicPricingManager_Review<br>The following grid format is available:<br>• StrategicPricing_OrderReview |

For additional information about the programs accessed by these tasks, see:

- *Setting Up Base Prices* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Building Adjustment Schedules* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Entering Sales Order Header and Detail Information* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

# 12 Advanced Pricing Roles: Additional UX One Components for Advanced Pricing

## Additional UX One Components for Advanced Pricing

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own UX One page or customizing existing pages.

**Charts**

These charts are based on EnterpriseOne programs and business views. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries may be associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available for Advanced Pricing:

| Component Title | Description |
|---|---|
| Sales Rebate by Period (P4078X\|W4078XA) | Use this chart to view the sales rebate for different periods of time.<br><br>This chart is based on the Rebate Transaction Summary program (P4079). |
| Number of Unused Sales Price Adjustments (P40741X\|40741XG) | Use this chart to view the number of unused sales price adjustments based on the adjustment type.<br><br>This chart is based on the Price Adjustment Type business view (V4071) and Price Adjustment Audit Trail business view (V4074A).<br><br>**Note:** The default query for this chart is set on the V4071 business view. If you set any additional query criteria, you may get inaccurate data on the chart. The system retrieves the total number of price adjustments from the V4071 business view and the total number of used price adjustments from the V4074A business view. To find out the number of unused price adjustments, the system uses a special logic to subtract the number of used price adjustments from the total number of price adjustments. |
| Number of Free Goods by Period (P4574X\|W4574XA) | Use this chart to view the number of free goods for different periods of time.<br><br>This chart is based on the Free Goods F4211 and F4574 business view (V4574A). |
| Price Adjustments by Adjustment Type (P4071X\|W4071XA) | Use this chart to view the percentage of price adjustments based on the adjustment type.<br><br>This chart is based on the Price Adjustment Type program (P4071). |
| Sales Price Adjustments by Control Code (P4071X\|W4071XD) | Use this chart to view the number of price adjustments based on the adjustment control code.<br><br>This chart is based on the Price Adjustment Type program (P4071). |
| Procurement Rebate by period (P4078X\|W4078XB) | Use this chart to view the procurement rebate for different periods of time.<br><br>This chart is based on the Rebate Transaction Summary program (P4079). |

| Component Title | Description |
|---|---|
| | |
| Purchase Order Lines with Price Overrides (P4511X\|W4511XA) | Use this chart to view the number of purchase orders that have price overrides.<br><br>This chart is based on the Order Entry program (P4310). |
| Purchase Orders with Manually Overridden Price Adjustments (P40741X\|W40741XF) | Use this chart to view the number of purchase orders that have manually overridden price adjustments.<br><br>This chart is based on the Price Adjustment Audit Trail Inquiry program (P4081). |
| Highest Sales Discounts (P42272X\|W42272XD) | Use this chart to view the highest discount given for a period of time.<br><br>This chart is based on the One View Sales To Date Inquiry - F4211 union F42119 business view (V42272C). |

For additional information about the programs associated with these charts, see:

- *Inquiry Programs for Advanced Pricing*
- *Creating Free Goods Adjustments* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Working with Adjustment Definitions* in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*
- *Entering Cascading Receipts* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*

# 13 Agreement Management Roles: Procurement Agreement Manager (Release 9.2 Update)

## Understanding the Procurement Agreement Manager UX One Role

The Procurement Agreement Manager role, and the associated UX One pages and components, enable users to easily access information to analyze trends, schedules, deadlines, and balance statements.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these roles, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Procurement Agreement Manager role (PRAGRMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the PRAGRMRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Procurement Agreement Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Agreement Management*.

# Using the Procurement Agreement Manager UX One Role

You use the Procurement Agreement Manager role to access these UX One pages:

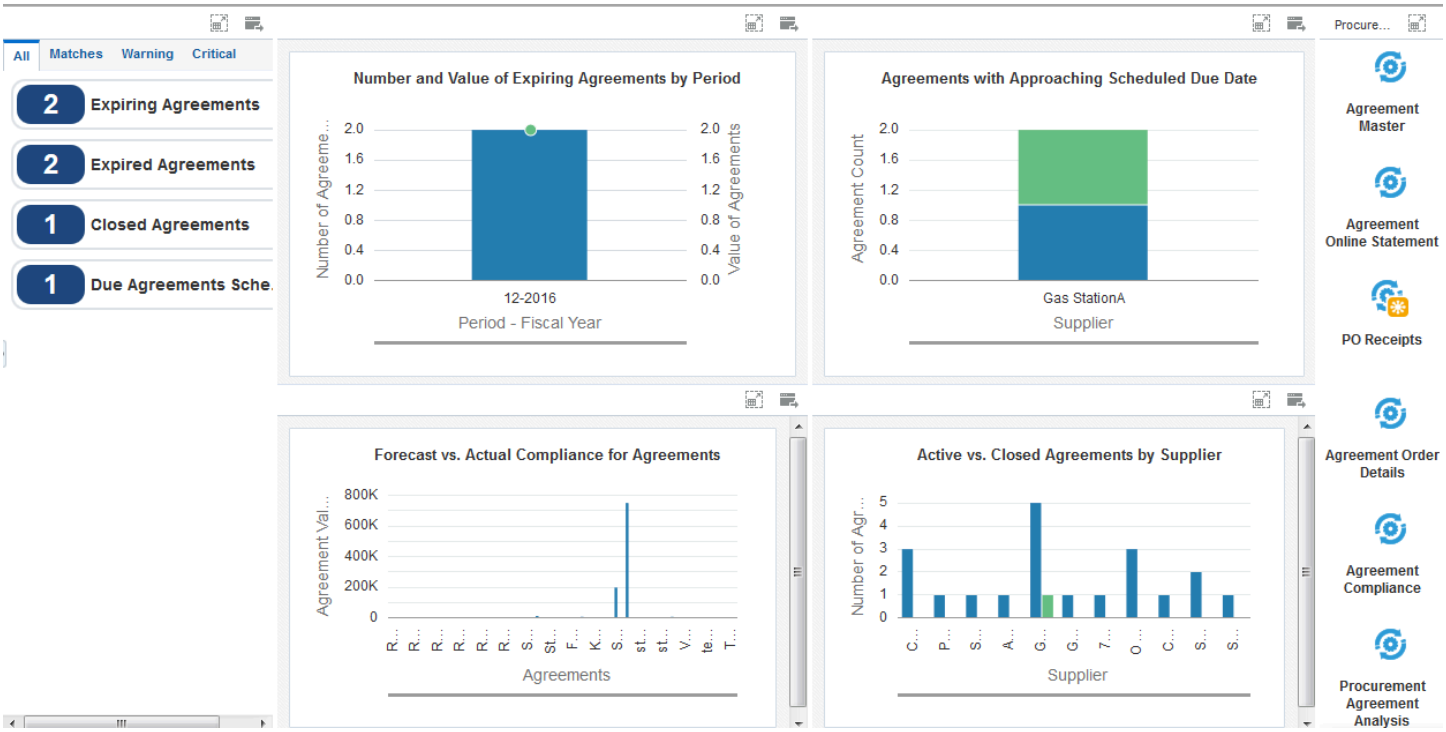
- Procurement Agreements (P38001X|W38001XA)
- Agreement Compliance (P38001X|W38001XB)
- Procurement Agreement Analysis (P38001X|W38001XC)

## UX One: Procurement Agreements Page

The Procurement Agreements page (P38001X|W38001XA) enables users to easily review the agreement schedules that are due, renegotiate expiring agreements, follow up with suppliers on closed agreements, and view the status of individual agreements with suppliers.

To access the UX One Procurement Agreements page, log in to the EnterpriseOne system using the Procurement Agreement Manager role.

This graphic illustrates the Procurement Agreements page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Procurement Agreements page:

| Watchlist Alert | Description |
|---|---|
| Expiring Agreements | This alert tells you how many procurement agreements will expire over a period of time for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• procurement Agr Order Details |
| Expired Agreements | This alert tells you how many procurement agreements expired over a period of time in the past for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• procurement Agr Order Details |
| Closed Agreements | This alert tells you how many procurement agreements were closed over a period of time in the past for a business unit.<br><br>This alert is based on the Closed Agreements Inquiry program (P38032).<br><br>When you click the alert, the system displays the Closed Agreements Inquiry form. The following form layout is available:<br><br>• Closed Agreements Inquiry<br>The following grid formats are available:<br><br>• Closed Agreement<br>• procurement Agr Order Details |
| Due Agreement Schedule | This alert displays the number of procurement agreements for which the scheduled due date is approaching.<br><br>This alert is based on the Agreement Schedule Inquiry program (P38031).<br><br>When you click the alert, the system displays the Agreement Schedule Inquiry form. The following form layout is available:<br><br>• Agreement Schedule<br>The following grid format is available:<br><br>• Agreement Schedule |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Procurement Agreements page:

| Component Title | Description |
|---|---|
| Number and Value of Expiring Agreements by Period (P38010X\|W38010XJ) | Use this chart to view the number and value of the procurement agreements that will expire over a period of time for a business unit.<br><br>This chart is based on the Agreement Detail Inquiry program (P38030). |
| Agreements with Approaching Scheduled Due Date (P38010X\|W38010XI) | Use this chart to view the number of procurement agreements for different suppliers for which the scheduled due date is approaching. You can view the number of procurement agreements for which the scheduled due date is:<br><br>• between zero and 30 days<br>• between 31 and 60 days<br>• between 61 and 90 days<br>• greater than 90 days<br>This chart is based on the Agreement Schedule Inquiry program (P38031). |
| Forecast vs. Actual Compliance for Agreements (P38010X\|W38010XL) | Use this chart to view a comparison of the forecast quantity, actual quantity, and committed quantity of procurement agreements for different suppliers.<br><br>This chart is based on the Agreement Master/ Product Source Dest Master Join business view (V38010JB). |
| Active vs. Closed Agreements by Supplier (P38010X\|W38010XB) | Use this chart to view a comparison of the number of active and closed procurement agreements for various customers.<br><br>This chart is based on the Agreement Master program (P38010). |

For additional information about the program associated with these charts, see *Processing Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Procurement Agreements page:

| Task | Description |
|---|---|
| Agreement Master | Use this task to access the Agreement Master program (P38010).<br><br>The following form layout is available: |

| Task | Description |
|---|---|
| | • Agreement Order Details |
| Agreement Online Statement | Use this task to access the Online Statement program (P38300). |
| PO Receipts | Use this task to access the PO Receipts program (P4312). |
| Shipment Confirmation | Use this task to access the Shipment Confirmation program (P4205). |
| Agreement Order Details | Use this task to access the Agreement Master program (P38010) where you can review agreement details and associated order details.<br>The following form layout is available:<br>• Agreement Order Details<br>The following grid formats are available:<br>• Agreement Management<br>• Procurement Agr Order Details |
| Procurement Agreement Compliance | Use this task to access the Procurement Agreement Compliance page (P38001X\|W38001XB). |
| Procurement Agreement Analysis | Use this task to access the Procurement Agreement Analysis page (P38001X\|W38001XC). |

For additional information about the programs accessed by these tasks, see:

- *Processing Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide*
- *Entering Sales Order Header and Detail Information* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *Understanding Agreement Management* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide*

# UX One: Agreement Compliance Page

The Agreement Compliance page (P38001X|W38001XB) enables users to:

- Improve customer relationship by identifying opportunities for new agreements.
- Formulate a pricing strategy by comparing the price between procurement orders created with and without agreement details.
- Monitor agreement compliance by following up on procurement orders created with or without the negotiated agreement price.

To access the UX One Agreement Compliance page, log in to the EnterpriseOne system using the Procurement Agreement Manager role. When you log in with this role, the system automatically displays the Procurement Agreements page. Click the Agreement Compliance task on the springboard to access the Agreement Compliance page.

This graphic illustrates the Agreement Compliance page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs and business views. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Agreement Compliance page:

| Watchlist Alert | Description |
|---|---|
| Expiring Agreements | This alert tells you how many procurement agreements will expire over a period of time for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• procurement Agr Order Details |
| Expired Agreements | This alert tells you how many procurement agreements expired over a period of time in the past for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• procurement Agr Order Details |
| Closed Agreements | This alert tells you how many procurement agreements were closed over a period of time in the past for a business unit.<br><br>This alert is based on the Closed Agreements Inquiry program (P38032).<br><br>When you click the alert, the system displays the Closed Agreements Inquiry form. The following form layout is available:<br><br>• Closed Agreements Inquiry<br>The following grid formats are available:<br><br>• Closed Agreement<br>• procurement Agr Order Details |
| Due Agreement Schedule | This alert displays the number of procurement agreements for which the scheduled due date is approaching.<br><br>This alert is based on the Agreement Schedule Inquiry program (P38031).<br><br>When you click the alert, the system displays the Agreement Schedule Inquiry form. The following form layout is available:<br><br>• Agreement Schedule<br>The following grid format is available:<br><br>• Agreement Schedule |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Agreement Compliance page:

| Component Title | Description |
|---|---|
| POs with/without Agreement Details by Period (P3811X\|W3811XB) | Use this chart to view the number of purchase orders created for an item for a period of time. You can view the number of purchase orders with agreement details and without agreement details for different periods of time.<br><br>This chart is based on the Purchase Order Detail Update - POE business view (V4311B). |
| Price Comparison of POs with/without Agreement Details (P3811X\|W3811XA) | Use this chart to compare the price of purchase orders associated with a procurement agreement against the price of purchase orders that are not associated with a procurement agreement for an item for different periods of time.<br><br>This chart is based on the Purchase Order Detail Update - POE business view (V4311B). |
| Voucher vs. Agreement Price (P38011X\|W38011XD) | Use this chart to compare the number of purchase order lines that have the same price as the negotiated agreement price against the number of purchase order lines with the price greater or less than the negotiated agreement price.<br><br>You can compare the purchase order lines based on these conditions:<br>• The voucher price is the same as the agreement price.<br>• The voucher price is different from the agreement price.<br>This chart is based on the F43121, F4311, and F38011 Join business view (V38011UB). |
| Agreements Created for Item per Month (P38011X\|W38011XB) | Use this chart to view the number of procurement agreements created for an item by month in a specified period.<br><br>This chart is based on the Agreement Quantities business view (V38011A). |

For additional information about the programs associated with these charts, see:

- *Creating Vouchers* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Creating Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Agreement Compliance page:

| Task | Description |
|---|---|
| Agreement Master | Use this task to access the Agreement Master program (P38010). |
| Purchase Orders | Use this task to access the Purchase Orders program (P4310). |
| Agreement Transaction Ledger | Use this task to access the Transaction Ledger program (P38350). |
| Agreement Order Details | Use this task to access the Agreement Master program (P38010).<br>The following form layout is available:<br>• Agreement Order Details<br>The following grid format is available:<br>• Agreement Management |

For additional information about the programs accessed by these tasks, see:

- *Creating Vouchers* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Processing Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide*

# UX One: Procurement Agreement Analysis Page

The Procurement Agreement Analysis page (P38001X|W38001XC) enables users to quickly view and analyze supplier data such as the top suppliers in terms of value, top procurement agreements, supplier agreements by fiscal year, and agreements by item.

To access the UX One Procurement Agreement Analysis page, log in to the EnterpriseOne system using the Procurement Agreement Manager role. When you log in with this role, the system automatically displays the Procurement Agreements page. Click the Procurement Agreement Analysis task on the springboard to access the Procurement Agreement Analysis page.

This graphic illustrates the Procurement Agreement Analysis page:

## Watchlist Alerts

These alerts are based on EnterpriseOne programs and business views. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Procurement Agreement Analysis page:

| Watchlist Alert | Description |
|---|---|
| Expiring Agreements | This alert tells you how many procurement agreements will expire over a period of time for a business unit. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• procurement Agr Order Details |
| Expired Agreements | This alert tells you how many procurement agreements expired over a period of time in the past for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• procurement Agr Order Details |
| Closed Agreements | This alert tells you how many procurement agreements were closed over a period of time in the past for a business unit.<br><br>This alert is based on the Closed Agreements Inquiry program (P38032).<br><br>When you click the alert, the system displays the Closed Agreements Inquiry form. The following form layout is available:<br><br>• Closed Agreements Inquiry<br>The following grid formats are available:<br><br>• Closed Agreement<br>• procurement Agr Order Details |
| Due Agreement Schedule | This alert displays the number of procurement agreements for which the scheduled due date is approaching.<br><br>This alert is based on the Agreement Schedule Inquiry program (P38031).<br><br>When you click the alert, the system displays the Agreement Schedule Inquiry form. The following form layout is available:<br><br>• Agreement Schedule<br>The following grid format is available:<br><br>• Agreement Schedule |

## Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Procurement Agreement Analysis page:

| Component Title | Description |
|---|---|
| Top 10 Suppliers Based on Value (P38010X\|W38010XP) | Use this chart to view the top 10 suppliers based on the total value of all their agreements. This chart also displays the consumed and remaining values for the procurement agreements.<br><br>This chart is based on the F38010, F38011, and F38012 Join business view (V38010UX). |
| Top 10 Procurement Agreements Based on Value (P38010X\|W38010XO) | Use this chart to view the top 10 procurement agreements based on the total value of the agreements. This chart further displays the consumed and remaining values for the agreements.<br><br>This chart is based on the F38010, F38011, and F38012 Join business view (V38010UX). |
| Supplier Agreements by Fiscal Year (P38010X\|W38010XC) | Use this chart to view the expired, closed, and active supplier agreements based on the fiscal year.<br><br>This chart is based on the Select Distinct/Agreement Master/Product Source/Destination business view (V38010JC). |
| Total Agreements by Item (P38010X\|W38010XA) | Use this chart to view the number of procurement agreements created for different items. You can view the number of active, expired, and closed agreements for each item.<br><br>This chart is based on the Agreement Master program (P38010). |

For additional information about the program associated with these charts, see *Processing Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Procurement Agreement Analysis page:

| Task | Description |
|---|---|
| Agreement Master | Use this task to access the Agreement Master program (P38010). |
| Agreement Transaction Ledger | Use this task to access the Transaction Ledger program (P38350). |
| Agreement Order Details | Use this task to access the Agreement Master program (P38010).<br><br>The following form layout is available:<br><br>• Agreement Order Details<br>The following grid format is available: |

| Task | Description |
| --- | --- |
| | • Agreement Management |

For additional information about the programs accessed by these tasks, see *Processing Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* .

# 14 Agreement Management Roles: Sales Agreement Manager (Release 9.2 Update)

## Understanding the Sales Agreement Manager UX One Role

The Sales Agreement Manager role, and the associated UX One pages and components, enable you to:

- View the watchlist alerts for expired sales agreements, agreements that are about to expire, closed agreements, and agreements for which the scheduled due date is approaching.
- Analyze sales agreement information.

  For example, if you want to compare the number of sales agreements that were active and the number of sales agreements that were closed for a customer in the last 15 days, you can use the Active vs. Closed Agreements by Customer chart to view this data.
- Access applications to review information or take immediate action, if necessary.

  For example, if you want to renew an expired agreement, you can click the Agreement Master (P38010) springboard task and update the agreement details in the Agreement Master program (P38010).

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these roles, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Sales Agreement Manager role (SLAGRMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the SLAGRMRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

## Prerequisite Reading

Before using the Sales Agreement Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Agreement Management*.

# Using the Sales Agreement Manager UX One Role

You use the Sales Agreement Manager role to access these UX One pages:

- Sales Agreements (P38002X|W38002XA)
- Sales Agreement Compliance (P38002X|W38002XB)
- Sales Agreement Analysis (P38002X|W38002XC)

## UX One: Sales Agreements Page

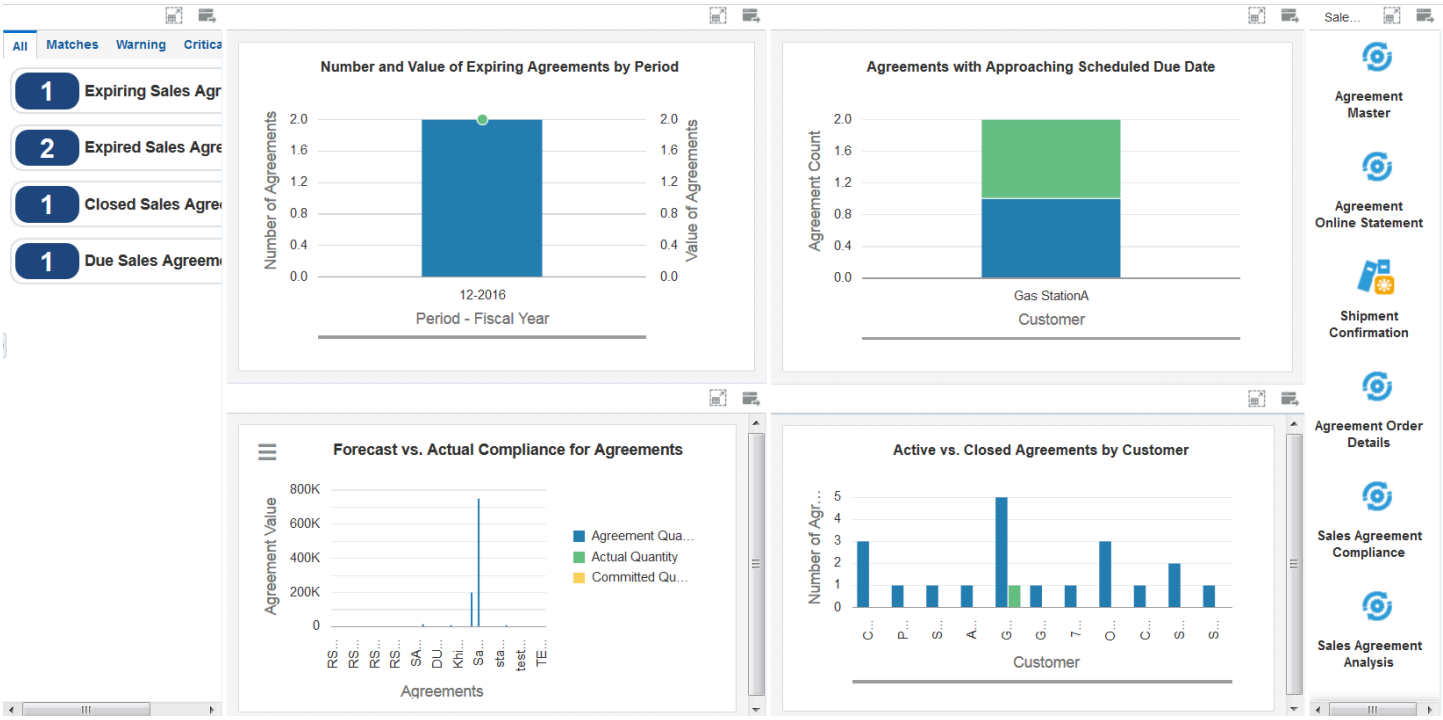
The Sales Agreements page (P38002X|W38002XA) enables you to receive important alerts, analyze sales agreement information, and act on the information that you see by accessing related applications and additional UX One pages.

You can use the Sales Agreements page to:

- Improve sales efficiency by following up on due agreement schedules.
- Quickly identify expiring agreements and work on renegotiations.
- Improve customer relationship by following up on exceptions and closed agreements.

To access the UX One Sales Agreements page, log in to the EnterpriseOne system using the Sales Agreement Manager role.

This graphic illustrates the Sales Agreements page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Sales Agreements page:

| Watchlist Alert | Description |
|---|---|
| Expiring Sales Agreements | This alert tells you how many sales agreements will expire over a period of time for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• Sales Agr Order Details |
| Expired Sales Agreements | This alert tells you how many sales agreements expired over a period of time in the past for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• Sales Agr Order Details |
| Closed Sales Agreements | This alert tells you how many sales agreements were closed over a period of time in the past for a business unit.<br><br>This alert is based on the Closed Agreements Inquiry program (P38032).<br><br>When you click the alert, the system displays the Closed Agreements Inquiry form. The following form layout is available:<br><br>• Closed Agreements Inquiry<br>The following grid formats are available:<br><br>• Closed Agreement<br>• Sales Agr Order Details |
| Due Sales Agreement Schedule | This alert displays the number of sales agreements for which the scheduled due date is approaching.<br><br>This alert is based on the Agreement Schedule Inquiry program (P38031).<br><br>When you click the alert, the system displays the Agreement Schedule Inquiry form. The following form layout is available:<br><br>• Agreement Schedule<br>The following grid format is available:<br><br>• Agreement Schedule |

## Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Sales Agreements page:

| Component Title | Description |
|---|---|
| Number and Value of Expiring Agreements by Period (P38010X\|W38010XG) | Use this chart to view the number and value of sales agreements that will expire over a period of time for a business unit.<br><br>This chart is based on the Agreement Detail Inquiry program (P38030). |
| Agreements with Approaching Scheduled Due Date (P38010X\|W38010XH) | Use this chart to view the number of sales agreements for different customers for which the scheduled due date is approaching. You can view the number of sales agreements for which the scheduled due date is:<br><br>• between zero and 30 days<br>• between 31 and 60 days<br>• between 61 and 90 days<br>• greater than 90 days<br>This chart is based on the Agreement Schedule Inquiry program (P38031). |
| Forecast vs. Actual Compliance for Agreements (P38010X\|W38010XK) | Use this chart to view a comparison of the forecast quantity, actual quantity, and committed quantity of sales agreements for different customers.<br><br>This chart is based on the Agreement Master/ Product Source Dest Master Join business view (V38010JB). |
| Active vs. Closed Agreements by Customer (P38010X\|W38010XF) | Use this chart to view a comparison of the number of active and closed sales agreements for various customers.<br><br>This chart is based on the Agreement Master program (P38010). |

For additional information about the program associated with these charts, see *"Creating Agreements"* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Sales Agreements page:

| Task | Description |
|---|---|
| Agreement Master | Use this task to access the Agreement Master program (P38010).<br><br>The following form layout is available: |

| Task | Description |
|---|---|
| | • Agreement Order Details |
| Agreement Online Statement | Use this task to access the Online Statement program (P38300). |
| Shipment Confirmation | Use this task to access the Shipment Confirmation program (P4205). |
| Agreement Order Details | Use this task to access the Agreement Master program (P38010).<br>The following form layout is available:<br>• Agreement Order Details<br>The following grid formats are available:<br>• Agreement Management<br>• Sales Agr Order Details |
| Sales Agreement Compliance | Use this task to access the Sales Agreement Compliance page (P38002X\|W38002XB). |
| Sales Agreement Analysis | Use this task to access the Sales Agreement Analysis page (P38002X\|W38002XC). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* :

- *Processing Agreements*
- *Managing Agreements*
- *Confirming Shipments*

# UX One: Sales Agreement Compliance Page

The Sales Agreement Compliance page (P38002X|W38002XB) enables you to:

- Improve customer relationship by identifying opportunities for new agreements.
- Formulate a pricing strategy by comparing the price between sales orders created with and without agreement details.
- Monitor agreement compliance by following up on sales orders created with or without the negotiated agreement price.

To access the UX One UX One Sales Agreement Compliance page, log in to the EnterpriseOne system using the Sales Agreement Manager role. When you log in with this role, the system automatically displays the Sales Agreements page. Click the Sales Agreement Compliance task on the springboard to access the Sales Agreement Compliance page.

This graphic illustrates the Sales Agreement Compliance page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs and business views. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Sales Agreement Compliance page:

| Watchlist Alert | Description |
|---|---|
| Expiring Sales Agreements | This alert tells you how many sales agreements will expire over a period of time for a business unit. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• Sales Agr Order Details |
| Expired Sales Agreements | This alert tells you how many sales agreements expired over a period of time in the past for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030).<br><br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br><br>• Agreement Detail Inquiry<br>The following grid formats are available:<br><br>• Expiry Agreement<br>• Sales Agr Order Details |
| Closed Sales Agreements | This alert tells you how many sales agreements were closed over a period of time in the past for a business unit.<br><br>This alert is based on the Closed Agreements Inquiry program (P38032).<br><br>When you click the alert, the system displays the Closed Agreements Inquiry form. The following form layout is available:<br><br>• Closed Agreements Inquiry<br>The following grid formats are available:<br><br>• Closed Agreement<br>• Sales Agr Order Details |
| Sales Agreement Schedule Due | This alert displays the number of sales agreements for which the scheduled due date is approaching.<br><br>This alert is based on the Agreement Schedule Inquiry program (P38031).<br><br>When you click the alert, the system displays the Agreement Schedule Inquiry form. The following form layout is available:<br><br>• Agreement Schedule<br>The following grid format is available:<br><br>• Agreement Schedule |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Sales Agreement Compliance page:

| Component Title | Description |
|---|---|
| Sales Orders with/without Agreement Details by Period (P4210X\|W4210XA) | Use this chart to view the number of sales orders created for an item for a period of time. You can view the number of sales orders with sales agreement details and without sales agreement details for different periods of time.<br><br>This chart is based on the Sales Order Entry program (P4210). |
| Price Comparison of Sales Orders with/without Agreement Details (P4210X\|W4210XB) | Use this chart to compare the price of sales orders associated with a sales agreement against the price of sales orders that are not associated with a sales agreement for an item for different periods of time.<br><br>This chart is based on the Sales Order Entry program (P4210). |
| Sales Orders with/without Agreement Price (P421138X\|W421138XA) | Use this chart to compare the number of sales order lines that have the same price as the negotiated agreement price against the number of sales order lines with the price greater or less than the negotiated agreement price.<br><br>You can compare the sales order lines based on these conditions:<br>• The agreement price is the same as the negotiated agreement price<br>• The agreement price is less than the negotiated agreement price<br>• The agreement price is more than the negotiated agreement price<br>This chart is based on the F4211, F42119, and F38011 Join business view (V38011UA). |
| Agreements Created for Item per Month (P38011X\|W38011XA) | Use this chart to view the number of sales agreements created for an item by month in a specified period.<br><br>This chart is based on the Agreement Quantities business view (V38011A). |

For additional information about the programs associated with these charts, see:

- *"Entering Sales Order Header and Detail Information"* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *"Creating Agreements"* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Sales Agreement Compliance page:

| Task | Description |
|---|---|
| Agreement Master | Use this task to access the Agreement Master program (P38010). |

| Task | Description |
|---|---|
| Customer Service Enquiry | Use this task to access the Customer Service Inquiry program (P4210). |
| Agreement Transaction Ledger | Use this task to access the Transaction Ledger program (P38350). |
| Agreement Order Details | Use this task to access the Agreement Master program (P38010).<br>The following form layout is available:<br>• Agreement Order Details<br>The following grid format is available:<br>• Agreement Management |

For additional information about the programs accessed by these tasks, see:

- *Processing Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide*
- *Entering Sales Order Header and Detail Information* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

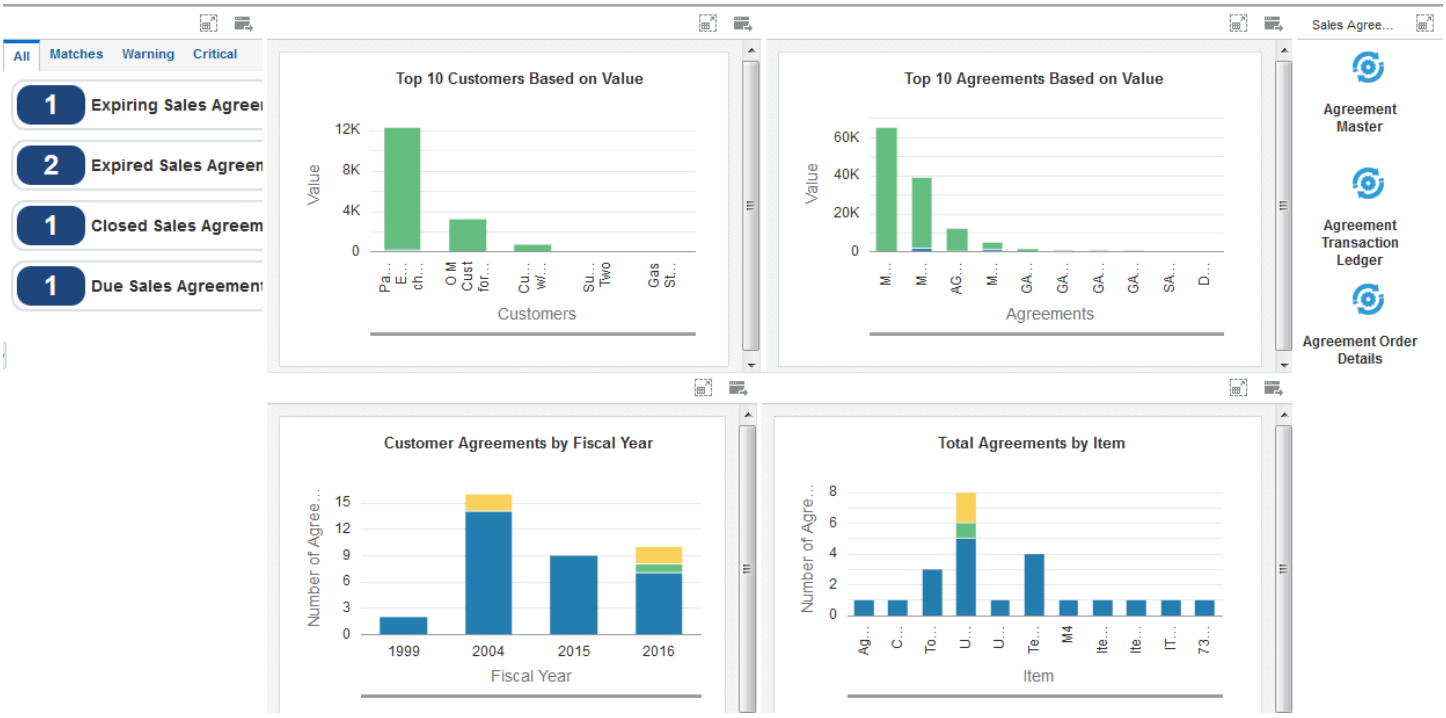
# UX One: Sales Agreement Analysis Page

The Sales Agreement Analysis page (P38002X|W38002XC) enables you to:

- Manage customer relationships effectively by monitoring top revenue-generating agreements and customers.
- Manage sales agreements efficiently by analyzing agreements based on various parameters.
- Analyze sales agreement trends for individual customers.

To access the UX One Sales Agreement Analysis page, log in to the EnterpriseOne system using the Sales Agreement Manager role. When you log in with this role, the system automatically displays the Sales Agreements page. Click the Sales Agreement Analysis task on the springboard to access the Sales Agreement Analysis page.

This graphic illustrates the Sales Agreement Analysis page:




## Watchlist Alerts

These alerts are based on EnterpriseOne programs and business views. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Sales Agreement Analysis page:

| Watchlist Alert | Description |
|---|---|
| Expiring Sales Agreements | This alert tells you how many sales agreements will expire over a period of time for a business unit.<br><br>This alert is based on the Agreement Detail Inquiry program (P38030). |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br>• Agreement Detail Inquiry<br>The following grid formats are available:<br>• Expiry Agreement<br>• Sales Agr Order Details |
| Expired Sales Agreements | This alert tells you how many sales agreements expired over a period of time in the past for a business unit.<br>This alert is based on the Agreement Detail Inquiry program (P38030).<br>When you click the alert, the system displays the Agreement Detail Inquiry form. The following form layout is available:<br>• Agreement Detail Inquiry<br>The following grid formats are available:<br>• Expiry Agreement<br>• Sales Agr Order Details |
| Closed Sales Agreements | This alert tells you how many sales agreements were closed over a period of time in the past for a business unit.<br>This alert is based on the Closed Agreements Inquiry program (P38032).<br>When you click the alert, the system displays the Closed Agreements Inquiry form. The following form layout is available:<br>• Closed Agreements Inquiry<br>The following grid formats are available:<br>• Closed Agreement<br>• Sales Agr Order Details |
| Sales Agreement Schedule Due | This alert displays the number of sales agreements for which the scheduled due date is approaching.<br>This alert is based on the Agreement Schedule Inquiry program (P38031).<br>When you click the alert, the system displays the Agreement Schedule Inquiry form. The following form layout is available:<br>• Agreement Schedule<br>The following grid format is available:<br>• Agreement Schedule |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Sales Agreement Analysis page:

| Component Title | Description |
|---|---|
| Top 10 Customers Based on Value (P38010X\|W38010XN) | Use this chart to view the top 10 customers based on the total value of all their sales agreements. This chart also displays the consumed and remaining agreement values.<br><br>This chart is based on the F38010, F38011, and F38012 Join business view (V38010UX). |
| Top 10 Agreements Based on Value (P38010X\|W38010XM) | Use this chart to view the top 10 sales agreements based on the total value of the agreements. This chart displays the consumed and remaining agreement values.<br><br>This chart is based on the F38010, F38011, and F38012 Join business view (V38010UX). |
| Customer Agreements by Fiscal Year (P38010X\|W38010XE) | Use this chart to view the number of expired, closed, and active sales agreements for a customer based on the fiscal year.<br><br>This chart is based on the Select Distinct/Agreement Master/Product Source/Destination business view (V38010JC). |
| Total Agreements by Item (P38010X\|W38010XD) | Use this chart to view the number of sales agreements created for different items. You can view the number of active, expired, and closed agreements for each item.<br><br>This chart is based on the Agreement Master program (P38010). |

For additional information about the program associated with these charts, see *Processing Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Sales Agreement Analysis page:

| Task | Description |
|---|---|
| Agreement Master | Use this task to access the Agreement Master program (P38010). |
| Agreement Transaction Ledger | Use this task to access the Transaction Ledger program (P38350). |
| Agreement Order Details | Use this task to access the Agreement Master program (P38010).<br><br>The following form layout is available:<br><br>• Agreement Order Details<br>The following grid format is available:<br><br>• Agreement Management |

For additional information about the programs accessed by these tasks, see *Processing Agreements* in the *JD Edwards EnterpriseOne Applications Agreement Management Implementation Guide* .

# 15 Benefits Management Roles: Benefits Manager

## Understanding the Benefits Manager UX One Role

The Benefits Manager role, and the associated UX One pages and components, enable users to:

- Receive important alerts regarding employee enrollment in various benefit plans.
- Analyze employee enrollment and their eligibility for various benefits.
- Easily access various benefits inquiry programs.

The Benefits Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*

## Prerequisites

Before using the Benefits Manager role (BENEMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the BENEMGRJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Benefits Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Benefits.*

# Using the Benefits Manager UX One Role

You use the Benefits Manager role to access these UX One pages:

- Benefits Manager (P08B001X|W08B001XA)
- Benefits Manager ACA (P08B001X|W08B001XB)

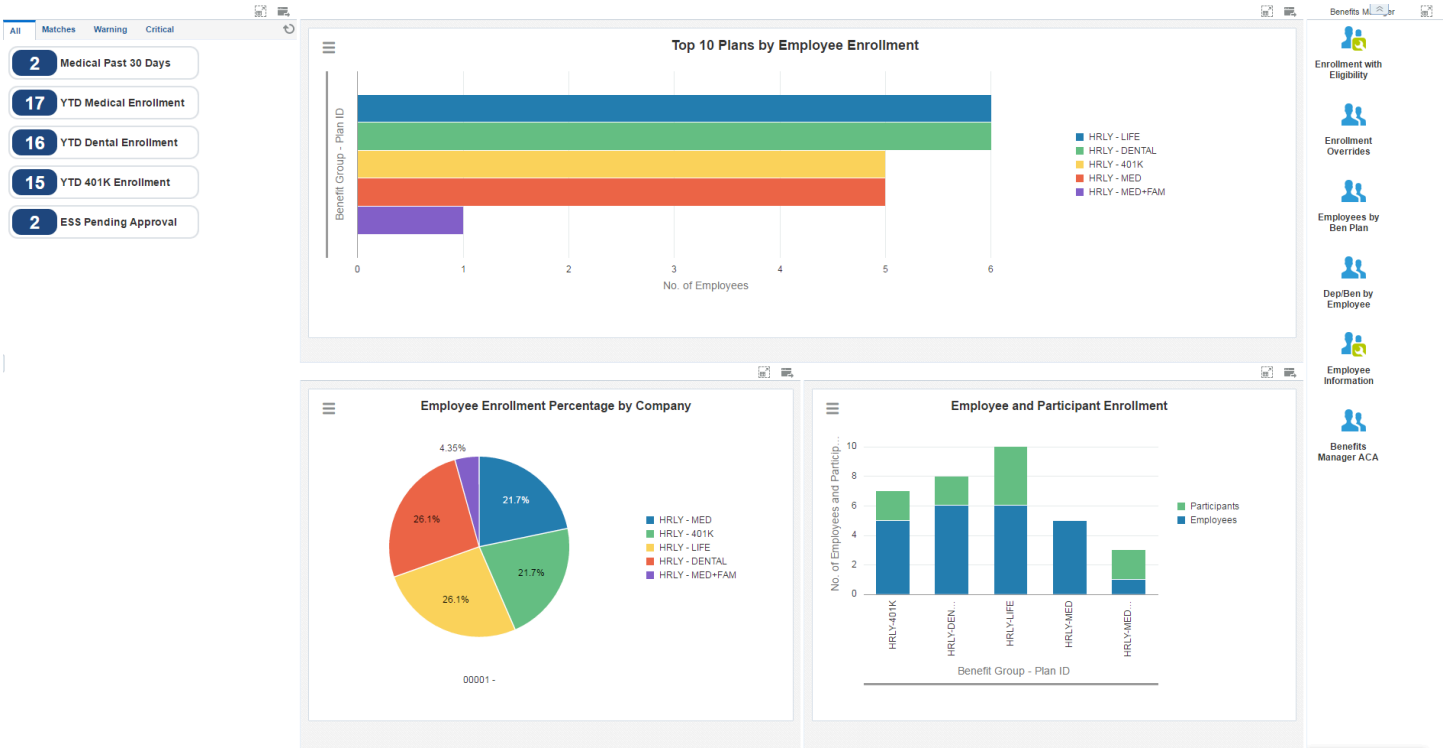
## UX One: Benefits Manager Page

The Benefits Manager page (P08B001X|W08B001XA) enables users to:

- Receive alerts related to employees enrollment in various benefit plans.
- Analyze employee and participant enrollment and top enrollment plans.
- Act quickly by easily accessing the benefits management programs.

To access the UX One Benefits Manager page, log in to the EnterpriseOne system using the Benefits Manager role.

This graphic illustrates the Benefits Manager page:


All
Matches
Warning
Critical
2
Medical Past 30 Days
17
YTD Medical Enrollment
16
YTD Dental Enrollment
15
YTD 401K Enrollment
2
ESS Pending Approval
Top 10 Plans by Employee Enrollment
Benefit Group - Plan ID
No. of Employees
HRLY - LIFE
HRLY - DENTAL
HRLY - 401K
HRLY - MED
HRLY - MED+FAM
Employee Enrollment Percentage by Company
4.35%
21.7%
26.1%
21.7%
26.1%
00001 -
HRLY - MED
HRLY - 401K
HRLY - LIFE
HRLY - DENTAL
HRLY - MED+FAM
Employee and Participant Enrollment
No. of Employees and Particip...
Participants
Employees
HRLY-401K
HRLY-LIFE
HRLY-MED
Benefit Group - Plan ID
Enrollment with Eligibility
Enrollment Overrides
Employees by Ben Plan
Dep/Ben by Employee
Employee Information
Benefits Manager ACA

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Benefits Manager page:

| Watchlist Alert | Description |
|---|---|
| Medical Past 30 Days | This alert tells users about the number of employees who have enrolled in medical benefits plan in the last 30 days.<br><br>This alert is based on the One View Employee Benefits Inquiry program (P08234).<br><br>When you click the alert, the system displays the One View Employee Benefits Inquiry form. The following form layout is available:<br><br>• Benefits Inquiry Enr Overrides<br>The following grid format is available:<br><br>• Simple |
| YTD Medical Enrollment | This alert tells users about the number of employees enrolled in medical plans year-to-date.<br><br>This alert is based on the One View Employee Benefits Inquiry program (P08234).<br><br>When you click the alert, the system displays the One View Employee Benefits Inquiry form. The following form layout is available:<br><br>• Benefits Inquiry Enr Overrides<br>The following grid format is available:<br><br>• Simple |
| YTD Dental Enrollment | This alert tells users about the number of employees who have enrolled in dental benefits in the current year.<br><br>This alert is based on the One View Employee Benefits Inquiry program (P08234).<br><br>When you click the alert, the system displays the One View Employee Benefits Inquiry form. The following form layout is available:<br><br>• Benefits Inquiry Enr Overrides<br>The following grid format is available:<br><br>• Simple |
| YTD 401K Enrollment | This alert tells users about the number of employees who have enrolled in 401K benefits in the current year.<br><br>This alert is based on the One View Employee Benefits Inquiry program (P08234).<br><br>When you click the alert, the system displays the One View Employee Benefits Inquiry form. The following form layout is available: |

| Watchlist Alert | Description |
|---|---|
| | • Benefits Inquiry Enr Overrides<br>The following grid format is available:<br>• Simple |
| ESS Pending Approval | This alert tells users about the number of Employee Self Service transactions that are pending approval.<br>This alert is based on the Work With ESS Workflow Approval program (P05420).<br>When you click the alert, the system displays the Work With ESS Workflow Approval form.<br>The following grid format is available:<br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *One View Employee Benefits Inquiry (P08234)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Benefits Manager page:

| Component Title | Description |
|---|---|
| Top 10 Plans by Enrollment (P08234X\|W08234XA) | Use this chart to review the top 10 plans related to employee enrollment.<br>This chart is based on the One View Employee Benefits Inquiry program (P08234). |
| Employee Enrollment Percent by Company (P08234X\|W08234XB) | Use this chart to review employee enrollment in percentages by company.<br>This chart is based on the One View Pay History Detail Inquiry program (P071862). |
| Employee and Participant Enrollment (P08234X\|W08234XC) | Use this chart to review the number of employees and participants for various benefits plans.<br>This chart is based on the One View PDBA History Inquiry program (P07146). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Employee Benefits Inquiry (P08234)*
- *One View Pay History Detail Inquiry (P071862)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Benefits Manager page:

| Task | Description |
|---|---|
| Enrollment with Eligibility | Use this task to access the Enrollment with Eligibility - Work with Enrollment With Eligibility program (P08334). |
| Enrollment Overrides | Use this task to access the Enrollment Overrides - Enrollment Overrides program (P08330). |
| Employee by Ben Plan | Use this task to access the Employees by Ben Plan - Work with Employees by Benefit Plan program (P08333).<br>The following form layout is available:<br>• Plan Employee Dep<br>The following grid format is available:<br>• Simple |
| Dependent/Benef by Employee | Use this task to access the Dependent/Beneficiary by Employee - Work with Employees program (P08336). |
| Employee Information | Use this task to access the Employee Information - Work with Information program (P0801, version ZJDE0002)<br>The following form layout is available:<br>• Employee ACA<br>The following grid format is available:<br>• Simple |
| Benefits Manager ACA | Use this task to access the Benefits Manager ACA page (P08B001X\|W08B001XB) |

For additional information about the programs accessed by these tasks, see:

- *Setting Processing Options for the Enrollment Overrides Program (P08330)* in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*
- *Setting Processing Options for the Enrollment with Eligibility Program (P08334)* in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*
- *Setting Processing Options for Employee Master (P0801)* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*

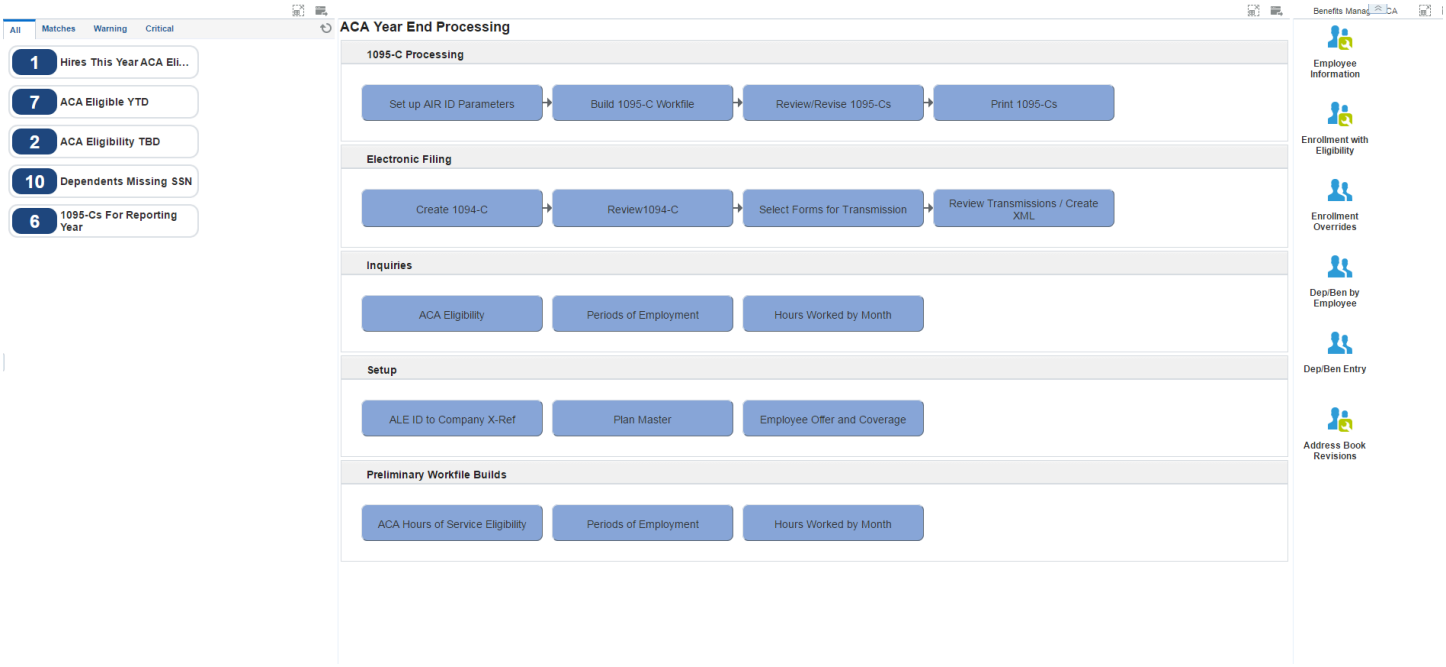
# UX One: Benefits Manager ACA Page

The Benefits Manager ACA (Affordable Care Act) page (P08B001X|W08B001XB) enables users to:

- Receive alerts regarding ACA eligibility and 1095-C records for employees.
- Use the workflow process and tasks to access various ACA-related applications.
- Act quickly by easily accessing the benefits management programs.

To access the Benefits Manager ACA page, log in to the EnterpriseOne system using the Benefits Manager role. When you log in with this role, the system automatically displays the Benefits Manager page. Click the Benefits Manager ACA task on the springboard to access the Benefits Manager ACA page.

This graphic illustrates the Benefits Manager ACA page:


All
Matches
Warning
Critical
1 Hires This Year ACA Eli...
7 ACA Eligible YTD
2 ACA Eligibility TBD
10 Dependents Missing SSN
6 1095-Cs For Reporting Year
ACA Year End Processing
1095-C Processing
Set up AIR ID Parameters
Build 1095-C Workfile
Review/Revise 1095-Cs
Print 1095-Cs
Electronic Filing
Create 1094-C
Review1094-C
Select Forms for Transmission
Review Transmissions / Create XML
Inquiries
ACA Eligibility
Periods of Employment
Hours Worked by Month
Setup
ALE ID to Company X-Ref
Plan Master
Employee Offer and Coverage
Preliminary Workfile Builds
ACA Hours of Service Eligibility
Periods of Employment
Hours Worked by Month
Employee Information
Enrollment with Eligibility
Enrollment Overrides
Dep/Ben by Employee
Dep/Ben Entry
Address Book Revisions

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Benefits Manager ACA page:

| Watchlist Alert | Description |
|---|---|
| Hires This Year ACA Eligible | This alert tells users about the number of employees who joined in the current year and are eligible for an offer of coverage based on ACA regulations and their eligibility record.<br><br>This alert is based on the Work With ACA Employee Eligibility program (P081161).<br><br>When you click the alert, the system displays the One View Employee Benefits Inquiry form. The following form layout is available:<br><br>• ACA Eligibility Details<br>The following grid format is available:<br><br>• Simple |
| ACA Eligible YTD | This alert tells users about the total number of employees who are eligible for ACA for the current year.<br><br>This alert is based on the Work With ACA Employee Eligibility program (P081161).<br><br>When you click the alert, the system displays the One View Employee Benefits Inquiry form. The following form layout is available:<br><br>• ACA Eligibility Details<br>The following grid format is available:<br><br>• Simple |
| ACA Eligible TBD | This alert tells users about the number of employees whose eligibility under ACA regulations is not yet determined.<br><br>This alert is based on the Work With ACA Employee Eligibility program (P081161).<br><br>When you click the alert, the system displays the One View Employee Benefits Inquiry form. The following form layout is available:<br><br>• ACA Eligibility Detail<br>The following grid format is available:<br><br>• Simple |
| Dependents Missing SSN | This alert tells users about the number of employees whose dependents' social security number (SSN) is blank.<br><br>This alert is based on the Work With Dependents/Beneficiaries program (P08901).<br><br>When you click the alert, the system displays the One View Employee Benefits Inquiry form. The following form layout is available: |

| Watchlist Alert | Description |
|---|---|
| | • Dep Address<br>The following grid format is available:<br>• Simple |
| 1095-Cs For Reporting Year | This alert tells users about the number of 1095-C records for a selected reporting year.<br>This alert is based on the Work with Form 1095-C Information program (P08119).<br>When you click the alert, the system displays the Work With Form 1095-C Information form. The following grid format is available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Setting Processing Options for the Dependent/Beneficiary Entry Program (P08901)* in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*
- *Working with Form 1095-C Workfiles Information* in the *JD Edwards EnterpriseOne Applications US Affordable Care Act Year-End Processing Guide 2019*

### Process Flows

This section displays process flows and icons that link to the Affordable Care Act related applications and reports. The icons enable you to perform various year-end processing tasks and generate reports related to ACA year-end reporting.

For additional information about ACA, see the *JD Edwards EnterpriseOne Applications US Affordable Care Act Year-End Processing Guide 2019* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Benefits Manager ACA page:

| Task | Description |
|---|---|
| Employee Information | Use this task to access the Employee Information - Work with Information program (P0801, version ZJDE0002)<br>The following form layout is available:<br>• Employee ACA<br>The following grid format is available:<br>• Simple |
| Enrollment with Eligibility | Use this task to access the Enrollment with Eligibility - Work with Enrollment With Eligibility program (P08334). |
| Enrollment Overrides | Use this task to access the Enrollment Overrides - Enrollment Overrides program (P08330). |

| Task | Description |
|---|---|
| Dependent/Benef by Employee | Use this task to access the Dependent/Beneficiary by Employee - Work with Employees program (P08336). |
| Dependent/Benefi Entry | Use this task to access the Dependent/Beneficiary Entry - Work With Dependents/Beneficiaries program (P08901).<br>The following form layout is available:<br>• Dep Address<br>The following grid format is available:<br>• Simple |
| Address Book Revisions | Use this task to access the Address Book Revision - Work With Addresses program (P01012). |

For additional information about the programs accessed by these tasks, see:

- *Setting Processing Options for the Enrollment Overrides Program (P08330)* in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*
- *Setting Processing Options for the Enrollment with Eligibility Program (P08334)* in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*
- *Setting Processing Options for Employee Master (P0801)* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*
- *Setting Processing Options for the Dependent/Beneficiary Entry Program (P08901)* in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*
- *Setting Processing Options for Address Book Revisions (P01012)* in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*

# 16 Blend Management Roles: Wine Cellar Manager (Release 9.2 Update)

## Understanding the Wine Cellar Manager UX One Role

The Wine Cellar Manager role, and the associated UX One pages and components, enable users to:

- Monitor operations in the wine cellar to identify areas of risk.
- Make informed decisions with better visibility into operations in the wine cellar.

The Wine Cellar Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Wine Cellar Manager role (WINECLRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the WINECLRJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Wine Cellar Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Blend Management.*

# Using the Wine Cellar Manager UX One Role

You use the Wine Cellar Manager role to access these UX One pages:

- Wine Cellar Manager (P31B002X|W31B002XA)
- Cellar Manager Exceptions (P31B002X|W31B002XB)
- Cellar Manager Resources (P31B002X|W31B002XC)

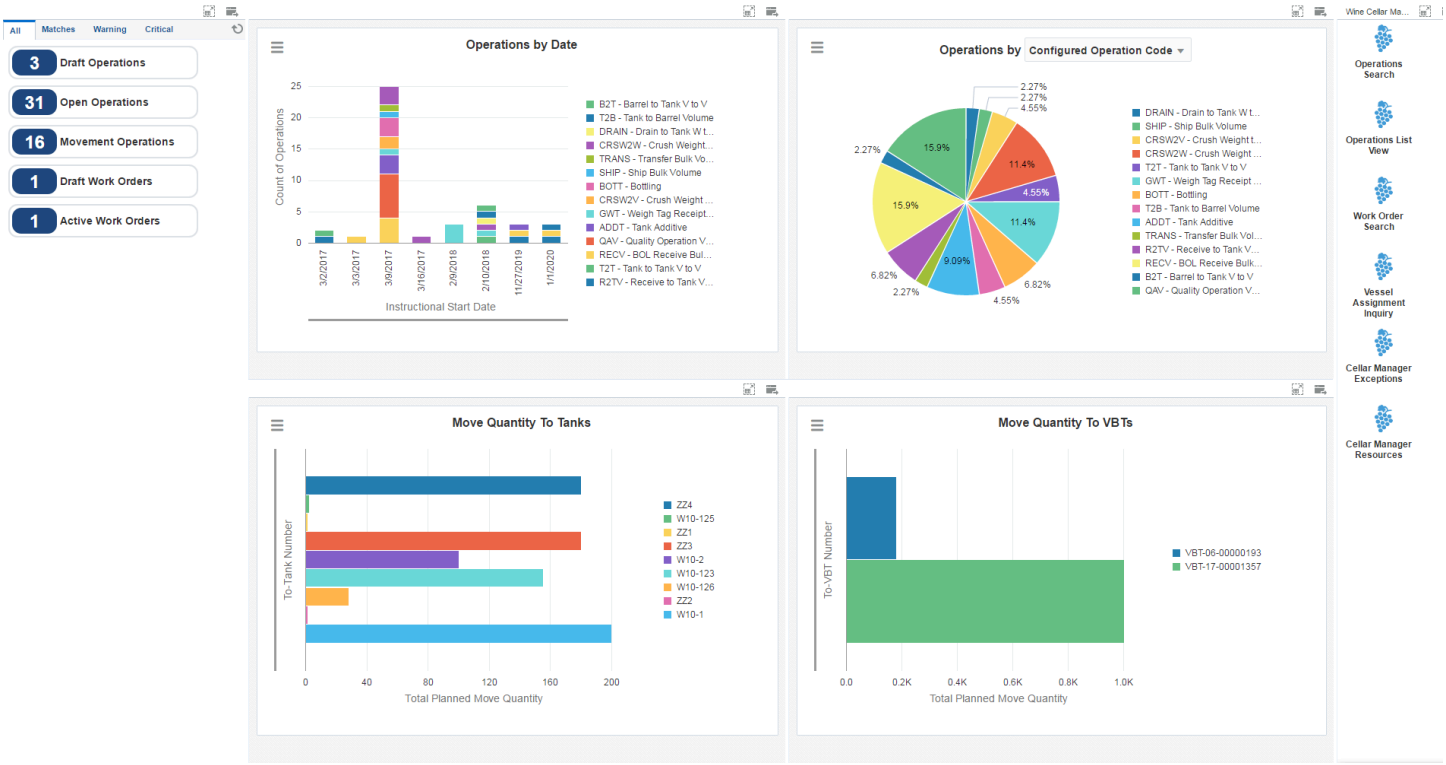
## UX One: Wine Cellar Manager Page

The Wine Cellar Manager page (P31B002X|W31B002XA) enables users to:

- Receive alerts regarding the operations and work orders in draft or active status.
- Analyze operations, quantity moved to tanks, and quantity moved to virtual barrel tanks (VBTs).
- Act quickly by easily accessing the Blend Management programs.

To access the UX One Wine Cellar Manager page, log in to the EnterpriseOne system using the Wine Cellar Manager role.

This graphic illustrates the Wine Cellar Manager page:


All
Matches
Warning
Critical
3 Draft Operations
31 Open Operations
16 Movement Operations
1 Draft Work Orders
1 Active Work Orders
Operations by Date
Count of Operations
Instructional Start Date
3/2/2017
3/3/2017
3/9/2017
3/16/2017
2/9/2018
2/10/2018
11/27/2019
1/1/2020
B2T - Barrel to Tank V to V
T2B - Tank to Barrel Volume
DRAIN - Drain to Tank W t...
CRSW2W - Crush Weight...
TRANS - Transfer Bulk Vo...
SHIP - Ship Bulk Volume
BOTT - Bottling
CRSW2V - Crush Weight ...
GWT - Weigh Tag Receipt...
ADDT - Tank Additive
QAV - Quality Operation V...
RECV - BOL Receive Bul...
T2T - Tank to Tank V to V
R2TV - Receive to Tank V...
Operations by Configured Operation Code
2.27%
2.27%
4.55%
15.9%
11.4%
4.55%
15.9%
11.4%
6.82%
9.09%
2.27%
6.82%
4.55%
DRAIN - Drain to Tank W t...
SHIP - Ship Bulk Volume
CRSW2V - Crush Weight t...
CRSW2W - Crush Weight ...
T2T - Tank to Tank V to V
GWT - Weigh Tag Receipt ...
BOTT - Bottling
T2B - Tank to Barrel Volume
ADDT - Tank Additive
TRANS - Transfer Bulk Vol...
R2TV - Receive to Tank V...
RECV - BOL Receive Bulk...
B2T - Barrel to Tank V to V
QAV - Quality Operation V...
Move Quantity To Tanks
To-Tank Number
Total Planned Move Quantity
ZZ4
W10-125
ZZ1
ZZ3
W10-2
W10-123
W10-126
ZZ2
W10-1
Move Quantity To VBTs
To-VBT Number
Total Planned Move Quantity
VBT-06-00000193
VBT-17-00001357
Wine Cellar Ma...
Operations Search
Operations List View
Work Order Search
Vessel Assignment Inquiry
Cellar Manager Exceptions
Cellar Manager Resources

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Wine Cellar Manager page:

| Watchlist Alert | Description |
|---|---|
| Draft Operations | This alert tells users the number of operations in draft status in the winery.<br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br>When you click the alert, the system displays the Search For Operation form. |
| Open Operations | This alert tells users the number of operations in active or actual status in the winery.<br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br>When you click the alert, the system displays the Search For Operation form. |
| Movement Operations | This alert tells users the number of movement operations in active, actual, or closed status and within the date range specified on the advanced query.<br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br>When you click the alert, the system displays the Search For Operation form. |
| Draft Work Orders | This alert tells users the number of work orders in draft status in the winery.<br>This alert is based on the Work Order Search - Search for Work Order program (P31B95).<br>When you click the alert, the system displays the Search For Operation form. |
| Active Work Orders | This alert tells users the number of work orders in active or actual status in the winery.<br>This alert is based on the Work Order Search - Search for Work Order program (P31B95).<br>When you click the alert, the system displays the Search For Operation form. |

For additional information about the programs associated with these watchlist alerts, see *Managing Operations* in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Wine Cellar Manager page:

| Component Title | Description |
|---|---|
| Operations by Date (P31B94X\|W31B94XD) | Use this chart to review the number of different types of operations; scheduled by instructed start date.<br><br>This chart is based on the Operation Search - Search For Operations program (P31B94). |
| Operations by (P31B94X\|W31B94XE) | Use this chart to review operations by percentage.<br><br>This chart is based on the Operation Search - Search For Operations program (P31B94).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select from these options:<br><br>• Workflow Status<br>• Configured Operation Code |
| Move Quantity To Tanks (P31B123X\| W31B123XA) | Use this chart to review the quantity that is planned to be moved to tanks.<br><br>This chart is based on the Vessel Assignment Inquiry - Vessel Assignment Inquiry program (P31B123). |
| Move Quantity To VBTs (P31B123X\| W31B123XB) | Use this chart to review the quantity that is planned to be moved to VBTs.<br><br>This chart is based on the Vessel Assignment Inquiry - Vessel Assignment Inquiry program (P31B123). |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Wine Cellar Manager page:

| Task | Description |
|---|---|
| Operations Search | Use this task to access the Operations Search - Search For Operations program (P31B94). |
| Operations List View | Use this task to access the Operations List View - Operations List program (P31B80). |
| Work Order Search | Use this task to access the Work Order Search - Search for Work Order program (P31B95). |
| Vessel Assignment Inquiry | Use this task to access the Vessel Assignment Inquiry - Vessel Assignment Inquiry program (P31B123). |
| Cellar Manager Exceptions | Use this task to access the Cellar Manager Exceptions page (P31B002X\|W31B002XB). |
| Cellar Manager Resources | Use this task to access the Cellar Manager Resources page (P31B002X\|W31B002XC). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide*:

- *Managing Operations*

- *Defining Work Orders and Templates*

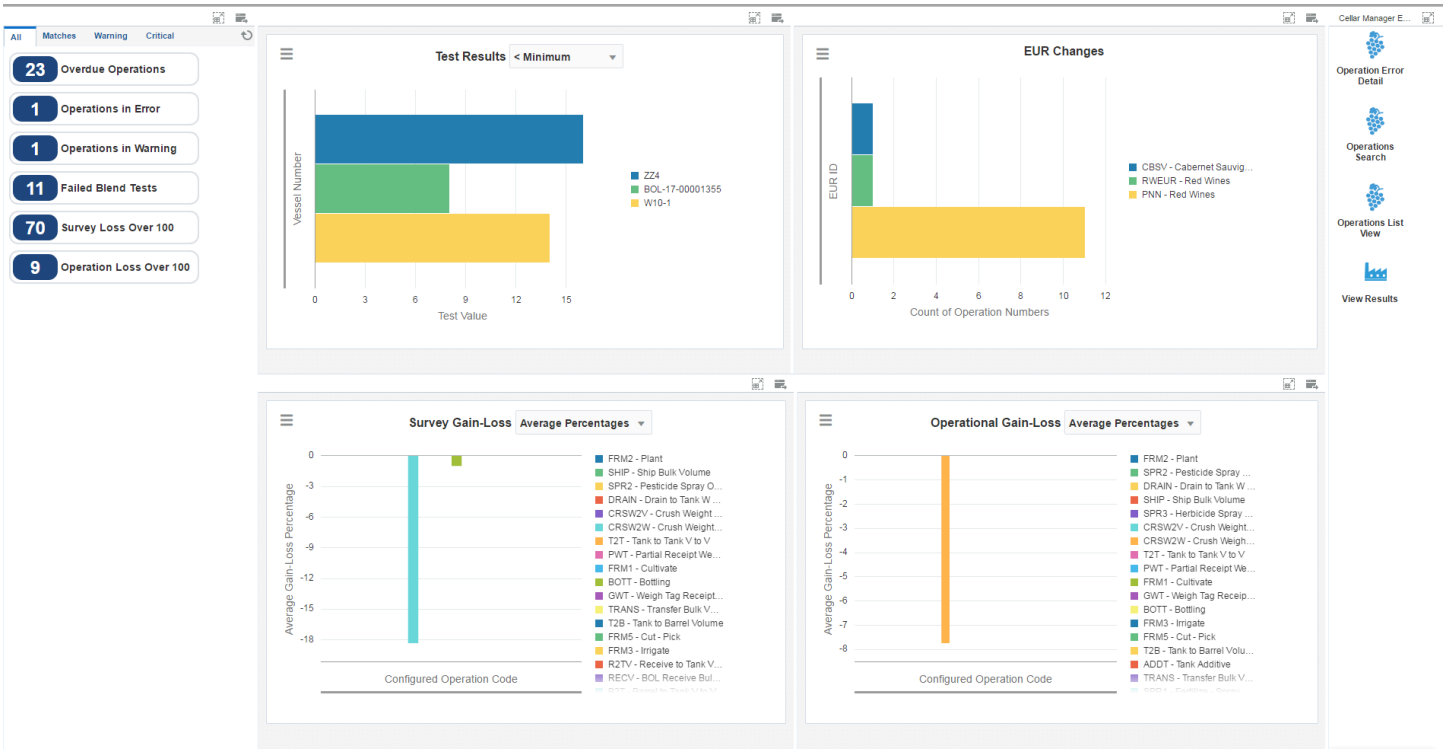
# UX One: Cellar Manager Exceptions Page

The Cellar Manager Exceptions page (P31B002X|W31B002XB) enables users to:

- Receive alerts regarding overdue operations, operations in error, failed blend tests, and operational or survey losses.
- Analyze test results, End-Use Reservation (EUR) changes, operational gains and losses, and survey gains and losses.
- Act quickly by easily accessing the Blend Management programs.

To access the UX One Cellar Manager Exceptions page, log in to the EnterpriseOne system using the Wine Cellar Manager role. When you log in with this role, the system automatically displays the Wine Cellar Manager page. Click the Cellar Manager Exceptions task on the springboard to access the Cellar Manager Exceptions page.

This graphic illustrates the Cellar Manager Exceptions page:


All
Matches
Warning
Critical
23 Overdue Operations
1 Operations in Error
1 Operations in Warning
11 Failed Blend Tests
70 Survey Loss Over 100
9 Operation Loss Over 100
Test Results
< Minimum
Vessel Number
ZZ4
BOL-17-00001355
W10-1
Test Value
EUR Changes
EUR ID
CBSV - Cabernet Sauvig...
RWEUR - Red Wines
PNN - Red Wines
Count of Operation Numbers
Cellar Manager E...
Operation Error Detail
Operations Search
Operations List View
View Results
Survey Gain-Loss
Average Percentages
Average Gain-Loss Percentage
Configured Operation Code
Operational Gain-Loss
Average Percentages
Average Gain-Loss Percentage
Configured Operation Code

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Cellar Manager Exceptions page:

| Watchlist Alert | Description |
|---|---|
| Overdue Operations | This alert tells users the number of operations that are in active or actual status, but have an instructed start date that is several days in the past.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Operations in Error | This alert tells users the number of operations that are in error status.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Operations in Warning | This alert tells users the number of operations that are in warning status due to an error in another operation.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Failed Blend Tests | This alert tells users the number of operations with results that failed the test.<br><br>This alert is based on the Test Results Inquiry - Test Results Analysis program (P37902).<br><br>When you click the alert, the system displays the Test Results Inquiry form. |
| Survey Loss Over 100 | This alert tells users the number of operations for which there is a survey loss greater than 100 units.<br><br>This alert is based on the Survey Gains Losses - Survey Gains Losses Inquiry program (P31B82).<br><br>When you click the alert, the system displays the Survey Gains Losses Inquiry form. |
| Operation Loss Over 100 | This alert tells users the number of operations for which there is an operational loss greater than 100 units.<br><br>This alert is based on the Operational Gains Losses - Operational Gains Losses Inquiry program (P31B83).<br><br>When you click the alert, the system displays the Operational Gains Losses Inquiry form. |

For additional information about the programs associated with these watchlist alerts, see *Managing Operations* in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Cellar Manager Exceptions page:

| Component Title | Description |
|---|---|
| Test Results (P37902X\|W37902XA) | Use this chart to review the test results that are above or below the allowed threshold.<br><br>This chart is based on the Test Results Inquiry - Test Results Analysis program (P37902).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select:<br><br>• >Maximum<br>• <Minimum |
| EUR Changes (P31B71X\|W31B71XA) | Use this chart to review a count of operations that resulted in a change to the EUR.<br><br>This chart is based on the Blend Transactions Inquiry - Blend Transactions Inquiry program (P31B71). |
| Survey Gain-Loss (P31B82X\|W31B82XA) | Use this chart to review either the quantities or the average of survey gain or loss on operations. Operations with no survey gain or loss are not included in the calculation.<br><br>This chart is based on the Survey Gains Losses - Survey Gains Losses Inquiry program (P31B82).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select:<br><br>• Average Percentages<br>• Quantities |
| Operational Gain-Loss (P31B83X\|W31B83XA) | Use this chart to review either the quantities or the average of operational gain or loss. Operations with no operational gain or loss are not included in the calculation.<br><br>This chart is based on the Operational Gains Losses - Operational Gains Losses Inquiry program (P31B83).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select:<br><br>• Average Percentages<br>• Quantities |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Cellar Manager Exceptions page:

| Task | Description |
|---|---|
| Operation Error Detail | Use this task to access the Operation Error Detail - Operation Error Detail program (P31B0800). |
| Operations Search | Use this task to access the Operation Search - Search for Operations program (P31B94). |
| Operations List View | Use this task to access the Operations List View - Operations List program (P31B80). |
| View Results | Use this task to access the View Results - View Results program (P3711A). |

For additional information about the programs accessed by these tasks, see *Managing Operations* in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* .

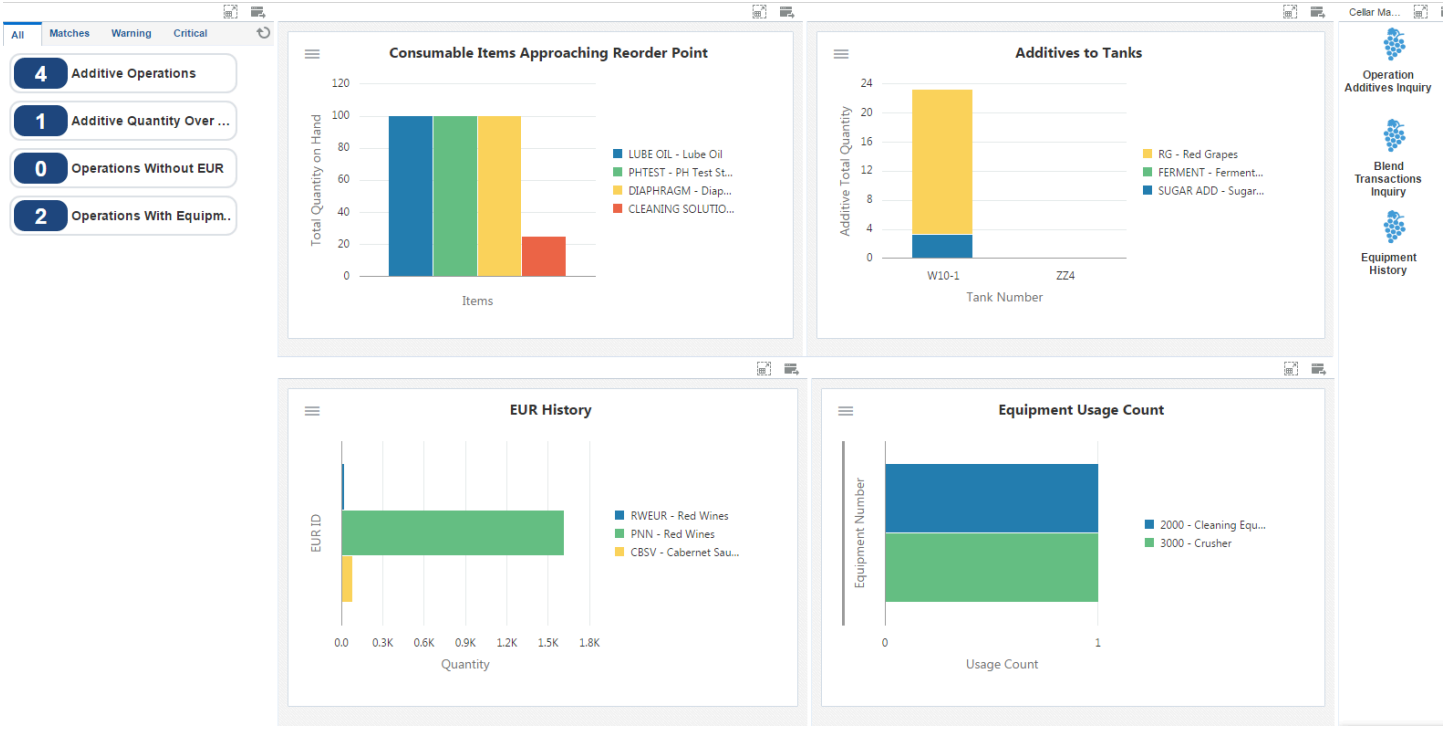
# UX One: Cellar Manager Resources Page

The Cellar Manager Resources page (P31B002X|W31B002XC) enables users to:

- Receive alerts regarding additive operations, additive quantity, operations without EUR, and operations with equipment.
- Analyze consumable items approaching reorder point, additives to tanks, EUR history, and equipment usage.
- Act quickly by easily accessing the Blend Management programs.

To access the UX One Cellar Manager Resources page, log in to the EnterpriseOne system using the Wine Cellar Manager role. When you log in with this role, the system automatically displays the Wine Cellar Manager page. Click the Cellar Manager Resources task on the springboard to access the Cellar Manager Resources page.

This graphic illustrates the Cellar Manager Resources page:




## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Cellar Manager Resources page:

| Watchlist Alert | Description |
|---|---|
| Additive Operations | This alert tells users the number of additive operations that are in active, actual, or closed status, and are within the actual start date range specified in the advanced query.<br><br>This alert is based on the Operation Additives Inquiry - Operation Additives Inquiry program (P31B99).<br><br>When you click the alert, the system displays the Operation Additives Inquiry form. The following form layout is available:<br><br>• Consumables Inquiry Operation (Release 9.2 Update)<br>The following grid format is available:<br><br>• Basic |
| Additive Quantity Over 10 | This alert tells users the number of additive operations for which the total quantity is more than 10 units.<br><br>This alert is based on the Operation Additives Inquiry - Operation Additives Inquiry program (P31B99).<br><br>When you click the alert, the system displays the Operation Additives Inquiry form. The following form layout is available:<br><br>• Consumables Inquiry Operation (Release 9.2 Update)<br>The following grid format is available:<br><br>• Basic |
| Operations without EUR | This alert tells users the number of blend operations without an End-Use Reservation (EUR).<br><br>This alert is based on the Blend Transactions Inquiry - Blend Transactions Inquiry program (P31B71).<br><br>When you click the alert, the system displays the Blend Transactions Inquiry form. The following grid format is available:<br><br>• Basic |
| Operations With Equipment | This alert tells users the number of blend operations that use a piece of equipment.<br><br>This alert is based on the Equipment History Inquiry - Equipment History Inquiry program (P31B122).<br><br>When you click the alert, the system displays the Equipment History Inquiry form. |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Cellar Manager Resources page:

| Component Title | Description |
|---|---|
| Consumable Items Approaching Reorder Point (P41021X\|W41021XA) | Use this chart to review the consumable items that are approaching the reorder point. The advanced query contains the list of consumables that are to be reported on. The report allows you to define a threshold that you consider to be the reorder point.<br><br>This chart is based on the F41021, F4102, and F0006 - Join business view (V41021UC). |
| Additives to Tanks (P31B99X\|W31B99XC) | Use this chart to review the quantity of additives from operations on tanks. The operations can have a status of active, actual, or closed. The range of actual start dates is specified in the advanced query.<br><br>This chart is based on the Operation Additives Inquiry - Operation Additives Inquiry program (P31B99). |
| EUR History (P31B71X\|W31B71XB) | Use this chart to review the quantities from closed operations of various EUR IDs.<br><br>This chart is based on the Blend Transactions Inquiry - Blend Transactions Inquiry program (P31B71). |
| Equipment Usage Count (P31B122X\|W31B122XA) | Use this chart to review the number of times a piece of equipment is used.<br><br>This chart is based on the Equipment History Inquiry - Equipment History Inquiry program (P31B122). |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Cellar Manager Resources page:

| Task | Description |
|---|---|
| Blend Transaction Inquiry | Use this task to access the Blend Transaction Inquiry - Blend Transaction Inquiry program (P31B71). |
| Equipment History | Use this task to access the Equipment History - Equipment History Inquiry program (P31B122). |
| Operation Additives Inquiry | Use this task to access the Operation Additives Inquiry program (P31B99).<br><br>The following grid format is available:<br><br>• Basic |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide*:

- *Equipment History Inquiry (P31B122)*
- *Managing Additive Operations*

# 17 Blend Management Roles: Winemaker (Release 9.2 Update)

## Understanding the Winemaker UX One Role

The Winemaker role, and the associated UX One pages and components, enable users to:

- Monitor trends over time for wine in different vessels.
- Tailor the wine making process with up-to-the minute information.
- Make informed decisions based on test results at various stages.

The Winemaker pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Winemaker role (WINEMKRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the WINEMKRJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Winemaker role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Blend Management*.

# Using the Winemaker UX One Role

You use the Winemaker role to access these UX One pages:

- Winemaker Operations (P31B001X|W31B001XA)
- Winemaker Receipts (P31B001X|W31B001XB)
- Winemaker Shipment/Bottling (P31B001X|W31B001XC)

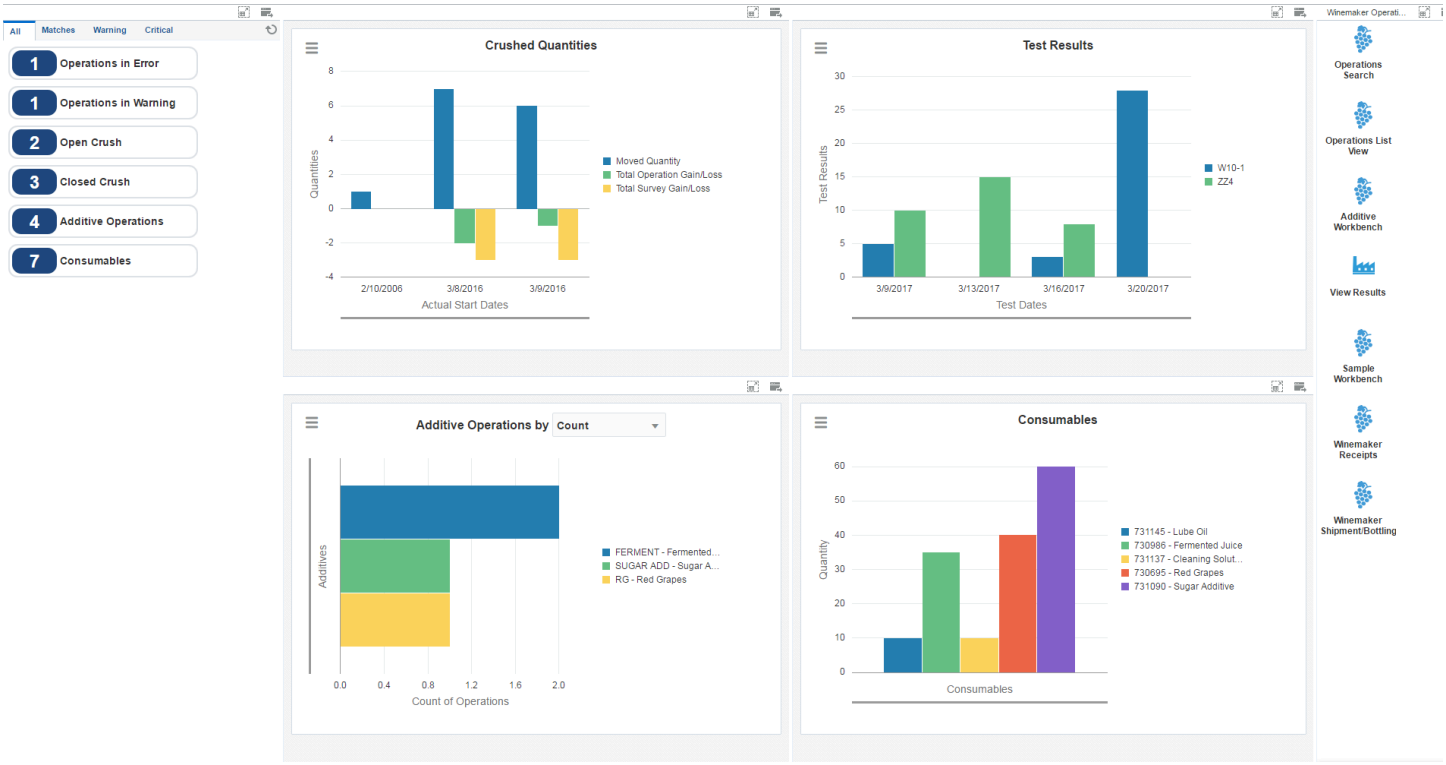
## UX One: Winemaker Operations Page

The Winemaker Operations page (P31B001X|W31B001XA) enables users to:

- Receive alerts regarding the operations in error, open and closed crush, additive operations, and operations that use consumables.
- Analyze crushed quantities, test results, additive operations, and operations that use consumables.
- Act quickly by easily accessing the Blend Management programs.

To access the UX One Winemaker Operations page, log in to the EnterpriseOne system using the Winemaker role.

This graphic illustrates the Winemaker Operations page:


All
Matches
Warning
Critical
1 Operations in Error
1 Operations in Warning
2 Open Crush
3 Closed Crush
4 Additive Operations
7 Consumables
Crushed Quantities
Quantities
Moved Quantity
Total Operation Gain/Loss
Total Survey Gain/Loss
2/10/2006
3/8/2016
3/9/2016
Actual Start Dates
Test Results
Test Results
W10-1
ZZ4
3/9/2017
3/13/2017
3/16/2017
3/20/2017
Test Dates
Winemaker Operati...
Operations Search
Operations List View
Additive Workbench
View Results
Sample Workbench
Winemaker Receipts
Winemaker Shipment/Bottling
Additive Operations by Count
Additives
FERMENT - Fermented...
SUGAR ADD - Sugar A...
RG - Red Grapes
Count of Operations
Consumables
Quantity
731145 - Lube Oil
730986 - Fermented Juice
731137 - Cleaning Solut...
730695 - Red Grapes
731090 - Sugar Additive
Consumables

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Winemaker Operations page:

| Watchlist Alert | Description |
|---|---|
| Operations in Error | This alert tells users the number of operations that are in error status.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Operations in Warning | This alert tells users the number of operations that are in warning status due to an error in another operation.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Open Crush | This alert tells users the number of crush operations that are in active status.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Closed Crush | This alert tells users the number of crush operations that are in closed status, and within the actual start date specified in the advanced query.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Additive Operations | This alert tells users the number of additive operations that are in active or closed status, and within the actual start date specified in the advanced query.<br><br>This alert is based on the Operation Additives Inquiry - Operation Additives Inquiry program (P31B99).<br><br>When you click the alert, the system displays the Operation Additives Inquiry form. The following form layout is available:<br><br>• Consumables Inquiry Operation (Release 9.2 Update)<br>The following grid format is available:<br><br>• Basic |
| Consumables | This alert tells users the number of operations that use consumables, and are within the actual start date specified in the advanced query.<br><br>This alert is based on the Consumables Inquiry - Consumables Inquiry program (P31B100). |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the Consumables Inquiry form. The following grid formats are available:<br>• Basic<br>• Simple |

For additional information about the programs accessed by these tasks, see *Managing Operations* in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Winemaker Operations page:

| Component Title | Description |
|---|---|
| Crushed Quantities (P31B94X\|W31B94XA) | Use this chart to review the quantity of grapes crushed based on the actual start date. The chart shows the quantity from the crush operation, along with operational and survey losses (or gains).<br>This chart is based on the Operation Search - Search For Operations program (P31B94). |
| Test Results (P37902X\|W37902XB) | Use this chart to review test results based on the test dates. The advanced query restricts this chart to test results from one test ID. The test value for that test ID must be numeric.<br>This chart is based on the Test Results Inquiry - Test Results Analysis program (P37902). |
| Additive Operations (P31B99X\|W31B99XA) | Use this chart to review additive operations by number of operations or quantity of the additives on the operations.<br>This chart is based on the Operation Additives Inquiry - Operation Additives Inquiry program (P31B99).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select from these options:<br>• Count<br>• Quantity |
| Consumables (P31B100X\|W31B100XA) | Use this chart to review the quantity of consumable items used on active operations.<br>This chart is based on the Consumables Inquiry - Consumables Inquiry program (P31B100). |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Winemaker Operations page:

| Task | Description |
|---|---|
| Operations Search | Use this task to access the Operation Search - Search For Operations program (P31B94). |
| Operations List View | Use this task to access the Operations List View - Operations List program (P31B80). |
| Additive Workbench | Use this task to access the Additive Workbench - Manage Additive program (P31B84). |
| View Results | Use this task to access the View Results - View Results program (P3711A). |
| Sample Workbench | Use this task to access the Sample Workbench - Search for Samples program (P31B62). |
| Winemaker Receipts | Use this task to access the Winemaker Receipts page (P31B001X\|W31B001XB). |
| Winemaker Shipment/Bottling | Use this task to access the Winemaker Shipment/Bottling page (P31B001X\|W31B001XC). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide*:

- *Managing Operations*
- *Entering Additional Operations*
- *Managing Quality*

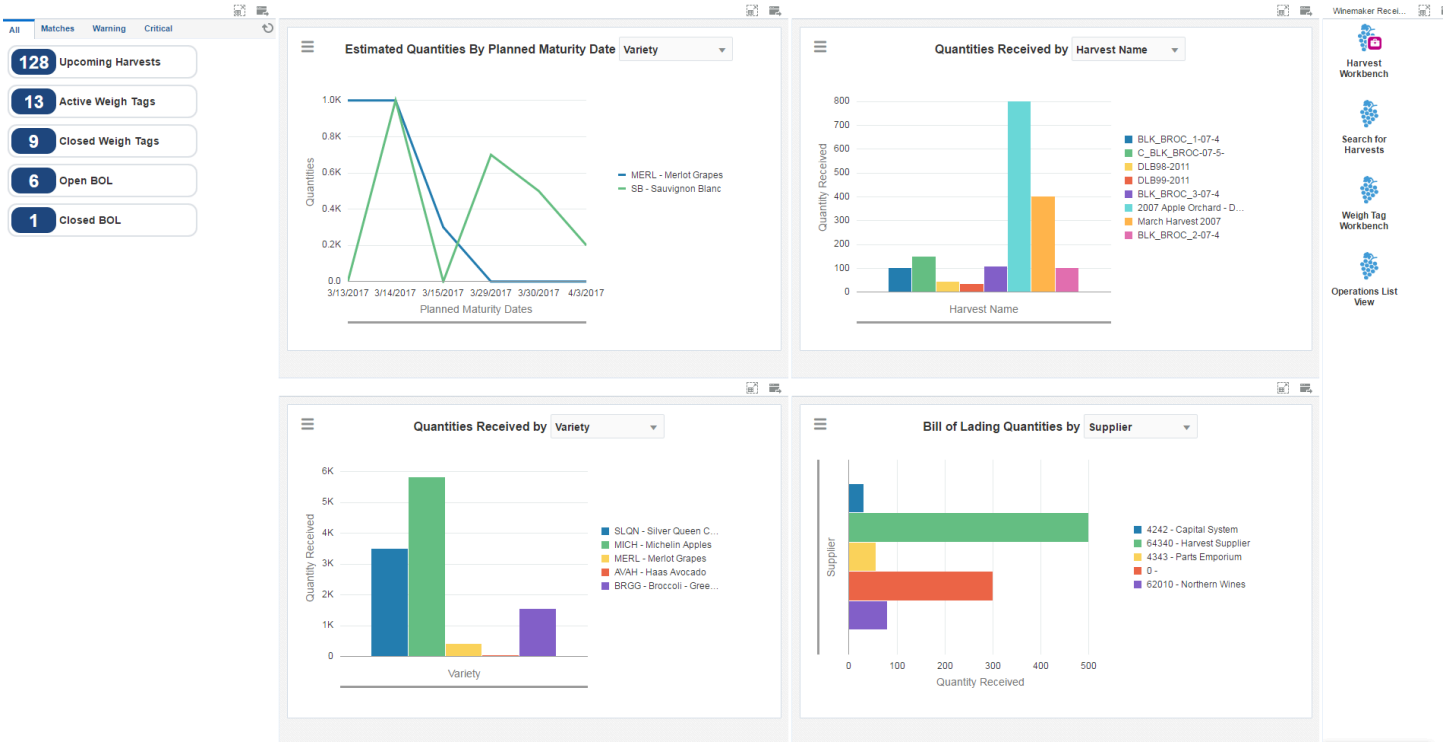
# UX One: Winemaker Receipts Page

The Winemaker Receipts page (P31B001X|W31B001XB) enables users to:

- Receive alerts regarding upcoming harvests, active and closed weigh tags, and open and closed BOL operations.
- Analyze the estimated quantities, quantities received, and bill of lading quantities.
- Act quickly by easily accessing the Blend Management programs.

To access the UX One Winemaker Receipts page, log in to the EnterpriseOne system using the Winemaker role. When you log in with this role, the system automatically displays the Winemaker Operations page. Click the Winemaker Receipts task on the springboard to access the Winemaker Receipts page.

This graphic illustrates the Winemaker Receipts page:


All
Matches
Warning
Critical
128 Upcoming Harvests
13 Active Weigh Tags
9 Closed Weigh Tags
6 Open BOL
1 Closed BOL
Estimated Quantities By Planned Maturity Date
Variety
Quantities
Planned Maturity Dates
MERL - Merlot Grapes
SB - Sauvignon Blanc
Quantities Received by
Harvest Name
Quantity Received
BLK_BROC_1-07-4
C_BLK_BROC-07-5-
DLB98-2011
DLB99-2011
BLK_BROC_3-07-4
2007 Apple Orchard - D...
March Harvest 2007
BLK_BROC_2-07-4
Winemaker Recei...
Harvest Workbench
Search for Harvests
Weigh Tag Workbench
Operations List View
Quantities Received by
Variety
SLQN - Silver Queen C...
MICH - Michelin Apples
MERL - Merlot Grapes
AVAH - Haas Avocado
BRGG - Broccoli - Gree...
Bill of Lading Quantities by
Supplier
4242 - Capital System
64340 - Harvest Supplier
4343 - Parts Emporium
0 -
62010 - Northern Wines

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Winemaker Receipts page:

| Watchlist Alert | Description |
|---|---|
| Upcoming Harvests | This alert tells users the number of harvests that have a planned maturity date within the date range specified in the advanced query.<br><br>This alert is based on the Harvest Workbench - Manage Harvests program (P40G032).<br><br>When you click the alert, the system displays the Manage Harvests form. |
| Active Weigh Tags | This alert tells users the number of weigh tag operations that are currently active.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Closed Weigh Tags | This alert tells users the number of weigh tag operations that are closed.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Open BOL | This alert tells users the number of Bill of Lading (BOL) operations that are currently open.<br><br>This alert is based on the BOL Inquiry - BOL Inquiry program (P31B97).<br><br>When you click the alert, the system displays the BOL Inquiry form. The following form layout is available:<br><br>• BOL Details (Release 9.2 Update)<br>The following grid formats are available:<br><br>• Basic<br>• Simple |
| Closed BOL | This alert tells users the number of Bill of Lading (BOL) operations that are closed.<br><br>This alert is based on the BOL Inquiry - BOL Inquiry program (P31B97).<br><br>When you click the alert, the system displays the BOL Inquiry form. The following grid formats are available:<br><br>• Basic<br>• Simple |

For additional information about the programs accessed by these Watchlist alerts, see these topics:

- *Using the Harvest Workbench* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*
- *Managing Operations* in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide*

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Winemaker Receipts page:

| Component Title | Description |
|---|---|
| Estimated Quantities By Planned Maturity Date (P40G03X\|W40G03XC) | Use this chart to review the estimated quantity of produce that may be received based on the planned maturity date.<br><br>This chart is based on the Search for Harvests - Search for Grower Harvests program (P40G03).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select:<br><br>• Variety<br>• Appellation<br>• Block Code |
| Quantities Received (P31B85X\|W31B85XB) | Use this chart to review the quantity of produce received from various harvests.<br><br>This chart is based on the Weigh Tag Inquiry - Weigh Tag Inquiry program (P31B85).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select:<br><br>• Harvest Name<br>• Block Code |
| Quantities Received (P31B85X\|W31B85XA) | Use this chart to review the quantity received for different varieties or End-use reservation (EUR).<br><br>This chart is based on the Weigh Tag Inquiry - Weigh Tag Inquiry program (P31B85).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select:<br><br>• Variety<br>• EUR |
| Bill of Lading Quantities (P31B97X\|W31B97XA) | Use this chart to review the quantity received for Bill of Lading.<br><br>This chart is based on the BOL Inquiry - BOL Inquiry program (P31B97).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select:<br><br>• Material Type |

| Component Title | Description |
|---|---|
| | • EUR<br>• Supplier |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Winemaker Receipts page:

| Task | Description |
|---|---|
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvests program (P40G032). |
| Search for Harvests | Use this task to access the Search for Harvests - Search for Grower Harvests program (P40G03).<br>The following form layout is available:<br>• Weigh Tags |
| Weigh Tag Workbench | Use this task to access the Weigh Tag Workbench - Search For Operations program (P31B94). |
| Operations List View | Use this task to access the Operations List View - Operations List program (P31B80). |

For additional information about the programs accessed by these tasks, see these topics:

- *Using the Harvest Workbench* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*
- *Entering Farms, Blocks, and Harvests* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*
- *Managing Operations* in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide*

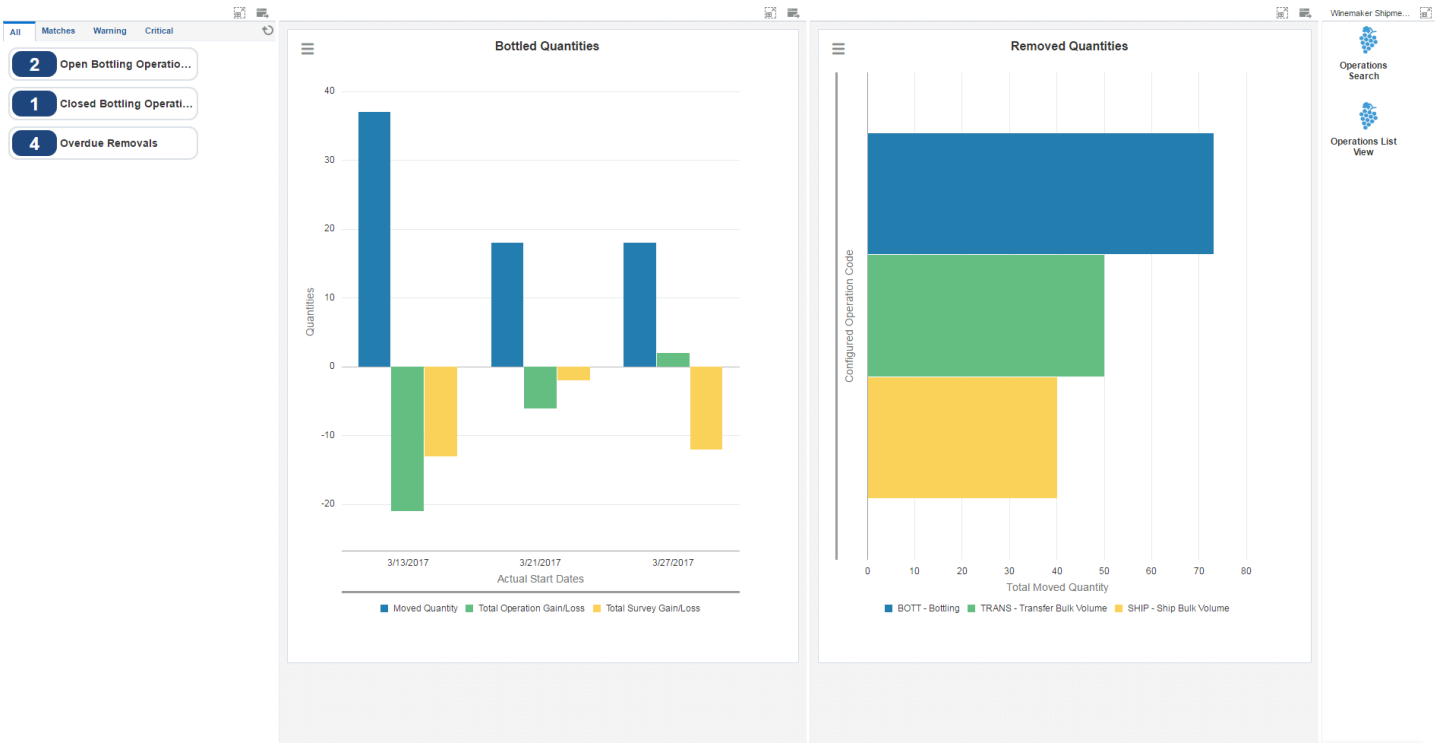
# UX One: Winemaker Shipment/Bottling Page

The Winemaker Shipment/Bottling page (P31B001X|W31B001XC) enables users to:

- Receive alerts regarding open and closed bottling operations and overdue removal operations.
- Analyze bottled quantities and removed quantities.
- Act quickly by easily accessing the Blend Management programs.

To access the UX One Winemaker Shipment/Bottling page, log in to the EnterpriseOne system using the Winemaker role. When you log in with this role, the system automatically displays the Winemaker Operations page. Click the Winemaker Shipment/Bottling task on the springboard to access the Winemaker Shipment/Bottling page.

This graphic illustrates the Winemaker Shipment/Bottling page:


All
Matches
Warning
Critical
2
Open Bottling Operatio...
1
Closed Bottling Operati...
4
Overdue Removals
Bottled Quantities
Quantities
40
30
20
10
0
-10
-20
3/13/2017
3/21/2017
3/27/2017
Actual Start Dates
Moved Quantity
Total Operation Gain/Loss
Total Survey Gain/Loss
Removed Quantities
Configured Operation Code
0
10
20
30
40
50
60
70
80
Total Moved Quantity
BOTT - Bottling
TRANS - Transfer Bulk Volume
SHIP - Ship Bulk Volume
Winemaker Shipme...
Operations Search
Operations List View

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Winemaker Shipment/Bottling page:

| Watchlist Alert | Description |
|---|---|
| Open Bottling Operations | This alert tells users the number of bottling operations that are currently open.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Closed Bottling Operations | This alert tells users the number of bottling operations that are closed, and within a date range specified in the advanced query.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Overdue Removals | This alert tells users the number of removal operations that are in active status, but have an instructed start date that is a few days earlier than the current date.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |

For additional information about the programs accessed by these watchlist alerts, see *Managing Operations* in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Winemaker Shipment/Bottling page:

| Component Title | Description |
|---|---|
| Bottled Quantities (P31B94X\|W31B94XB) | Use this chart to review the quantities of bottling operations based on the actual start date. The chart shows the quantity bottled and any operational or survey losses (or gains).<br><br>This chart is based on the Operation Search - Search For Operations program (P31B94). |
| Removed Quantities (P31B94X\|W31B94XC) | Use this chart to review the quantities that have been removed through various operations.<br><br>This chart is based on the Operation Search - Search For Operations program (P31B94). |

| Component Title | Description |
| --- | --- |
| | |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Winemaker Shipment/Bottling page:

| Task | Description |
| --- | --- |
| Operations Search | Use this task to access the Operations Search - Search For Operations program (P31B94). |
| Operations List View | Use this task to access the Operations List View - Operations List program (P31B80). |

For additional information about the programs accessed by these charts, see *Managing Operations* in the *JD Edwards EnterpriseOne Applications Blend Management Implementation Guide* .

# 18 Capital Asset Management Roles: Asset Manager (Release 9.2 Update)

## Understanding the Asset Manager UX One Role

The Asset Manager role, and the associated UX One pages and components, enable users to receive alerts, analyze data, and access related programs to enable them to take action, if required.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Asset Manager role (ASSTMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the ASSTMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Asset Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Capital Asset Management*.

## Using the Asset Manager UX One Role

You use the Asset Manager role to access these UX One pages:

- Asset Manager (P13007X|W13007XA)

- Asset Performance (P13007X|W13007XB)
- Asset Reliability (P13007X|W13007XC)

# UX One: Asset Manager Page

The Asset Manager page (P13007X|W13007XA) enables you to receive alerts about equipment that are not associated with any location, analyze data related to maintenance of asset information, and act on the data that you see by accessing related programs.

To access the UX One Asset Manager page, log in to the EnterpriseOne system using the Asset Manager role.

This graphic illustrates the Asset Manager page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs and business views. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Asset Manager page:

| Watchlist Alert | Description |
|---|---|
| Equipment Without Location | This alert displays the number of pieces of equipment in a business unit that are not assigned to a location.<br><br>This alert is based on the Equipment Master program (P1701). When you click this alert, the system displays the Search for Equipment Work Orders form.<br><br>The following form layout is available:<br><br>• Maintain Equipment Master<br>The following grid format is available:<br><br>• WW Equipment<br>The following personal form is available:<br><br>• Equipment Master |

For additional information about the program associated with this watchlist alert, see *Creating Equipment Master Records Manually* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Asset Manager page:

| Component Title | Description |
|---|---|
| Average Days At and Not At Status (P13400X\|W13400XA) | Use this chart to review the status history for a piece of equipment.<br><br>This chart is based on the One View Equipment Status Inquiry program (P13400).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Manufacturer<br>• Product Family<br>• Product Model |
| Total Cost (P13560X\|W13560XG) | Use this chart to review the total work order cost.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Product Family<br>• Product Model<br>• Equipment |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* :

- *One View Equipment Status Inquiry (P13400)*
- *One View Work Order Analysis (P13560)*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Asset Manager page:

| Task | Description |
|---|---|
| Equipment Work Orders | Use this task to access the Work With Work Orders program (P48201, version ZJDE0001), where you can review work order data and generate recommendations to replace, rebuild, or repair equipment.<br>The following form layout is available:<br>• CAM Work Order Revisions<br>The following grid format is available:<br>• CAM Work Orders |
| Component Display | Use this task to access the Equipment Master Parent/Child program (P12017, version ZJDE0001) to review parent-component relationships. |
| Equipment Parts List | Use this task to access the Equipment Parts List program (P13017, version ZJDE0001) to review the parts list for an equipment.<br>The following grid format is available:<br>• Equipment Parts List |
| Equipment Locations | Use this task to access the Work With Locations program (P12215, version ZJDE0001), where you can review equipment locations and move equipment that are no longer in use to inactive locations. |
| PM Schedules | Use this task to access the Equipment PM Schedule program (P1207, version ZJDE0001), where you can review preventive maintenance schedules of equipment.<br>The following form layout is available:<br>• Maintain PM Schedules<br>**Note:**To use the PM Maintain Schedules form layout, you must set the equipment number as the default primary number for the equipment in the Fixed Asset Constants program (P001012). If you set the unit number or serial number as the default primary number, the system may display an error. |
| Equipment Master | Use this task to access the Work with Equipment Master program (P1701, version ZJDE0002), where you can review equipment master information to ensure that financial data of equipment is accurate.<br>The following form layout is available:<br>• Maintain Equipment Master<br>The following grid format is available: |

| Task | Description |
|---|---|
| | • WW Equipment<br>The following personal form is available:<br>• Equipment Master |
| Asset Performance | Use this task to access the Asset Performance page. |
| Asset Reliability | Use this task to access the Asset Reliability page. |

For additional information about the programs accessed by these tasks, see:

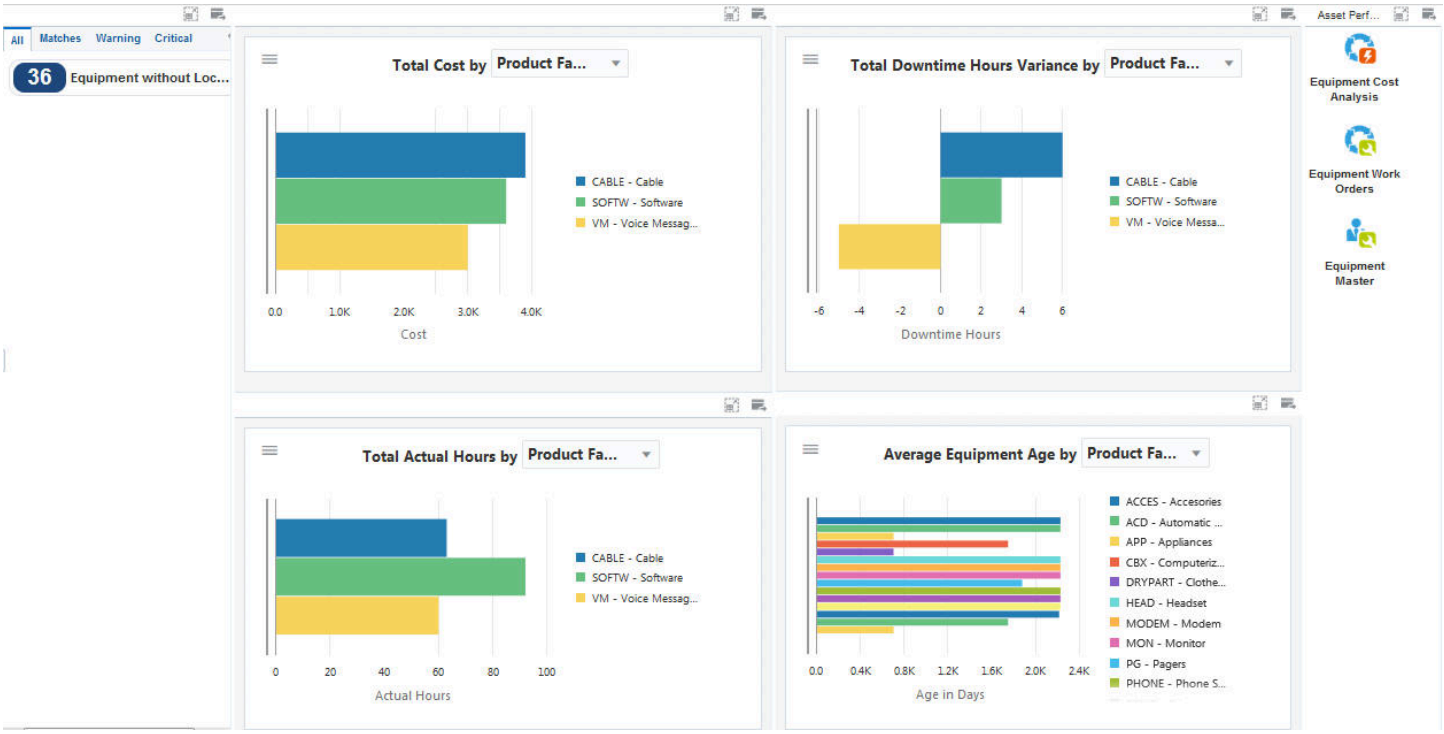
- *Creating Work Orders Using the Work Order Entry Programs (P48201 and P17714)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working With Parent and Component Information* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Creating an Equipment Parts List* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Equipment Locations* in the *JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide*
- *Scheduling Maintenance for Installed Equipment* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Creating Equipment Master Records Manually* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

# UX One: Asset Performance Page

The Asset Performance page (P13007X|W13007XB) enables you to receive alerts about equipment that are not associated with any location, review work order metrics, and access related programs where you can perform any required action.

To access the UX One Asset Performance page, log in to the EnterpriseOne system using the Asset Manager role. When you log in with this role, the system automatically displays the Asset Manager page. Click the Asset Performance task on the springboard to access the Asset Performance page.

This graphic illustrates the Asset Performance page:




### Watchlist Alerts

The watchlist alerts on the Asset Performance page are the same as the watchlist alerts on the Asset Manager page. See "*Watchlist Alerts*" for the Asset Manager page.

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Asset Performance page:

| Component Title | Description |
|---|---|
| Total Cost (P13560X\|W13560XG) | Use this chart to review the total work order cost.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Product Family<br>• Product Model<br>• Equipment |
| Total Downtime Hours Variance (P13560X\|W13560XI) | Use this chart to view the total downtime hours variance based on the assignee, equipment, product family, or product model.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Equipment<br>• Product Family<br>• Product Model |
| Total Actual Hours (P13560X\|W13560XR) | Use this chart to view the total number of actual hours for your work orders.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Product Family<br>• Product Model |
| Average Equipment Age (P13230X\|W13230XB) | Use this chart to review the average age of each equipment.<br><br>This chart is based on the Work With Equipment Master program (P1701).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Manufacturer<br>• Equipment<br>• Product Family<br>• Product Model |

For additional information about the programs associated with these charts, see:

- *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

- *Creating Equipment Master Records Manually* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Asset Performance page:

| Task | Description |
|---|---|
| Equipment Cost Analysis | Use this task to access the Equipment Cost Analysis program (P13801, version ZJDE0002). |
| Equipment Work Orders | Use this task to access the Work With Work Orders program (P48201, version ZJDE0001), where you can review work order data.<br>The following form layout is available:<br>• CAM Work Order Revisions<br>The following grid format is available:<br>• CAM Work Orders |
| Equipment Master | Use this task to access the Work with Equipment Master program (P1701, version ZJDE0002), where you can review equipment master information to ensure that the financial data of the equipment is accurate.<br>The following form layout is available:<br>• Maintain Equipment Master<br>The following grid format is available:<br>• WW Equipment<br>The following personal form is available:<br>• Equipment Master |

For additional information about the programs accessed by these tasks, see:

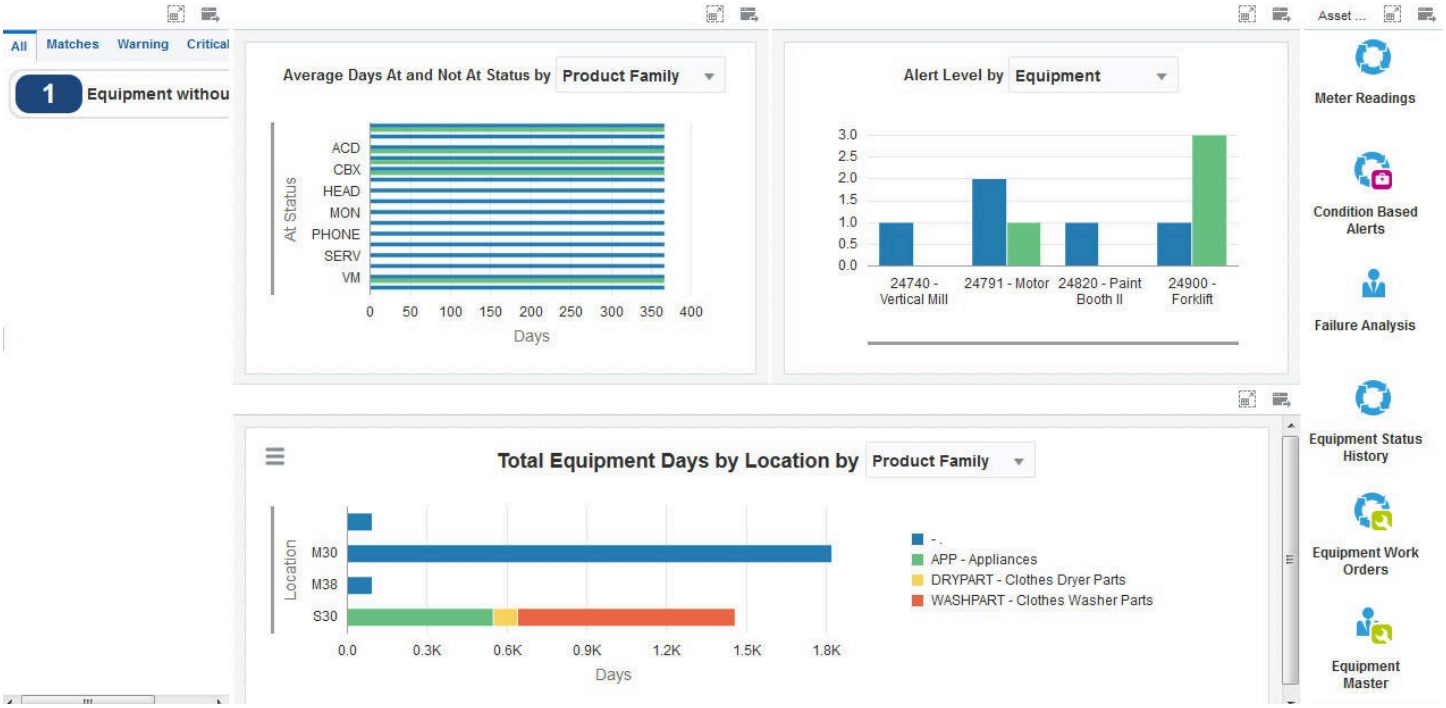
- *Setting Up Equipment Cost Analysis* in the *JD Edwards EnterpriseOne Applications Equipment Cost Analysis Implementation Guide*
- *Creating Work Orders Using the Work Order Entry Programs (P48201 and P17714)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Creating Equipment Master Records Manually* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

# UX One: Asset Reliability Page

The Asset Reliability page (P13007X|W13007XC) enables you to receive alerts about equipment that are not associated with any location, analyze equipment data such as alert metrics and idle locations, and access related programs where you can perform any required action.

To access the UX One Asset Reliability page, log in to the EnterpriseOne system using the Asset Manager role. When you log in with this role, the system automatically displays the Asset Manager page. Click the Asset Reliability task on the springboard to access the Asset Reliability page.

This graphic illustrates the Asset Reliability page:




### Watchlist Alerts

The watchlist alerts on the Asset Reliability page are the same as the watchlist alerts on the Asset Manager page. See "*Watchlist Alerts*" for the Asset Manager page.

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Asset Reliability page:

| Component Title | Description |
|---|---|
| Average Days At and Not At Status (P13400X\|W13400XA) | Use this chart to review the status history for a piece of equipment.<br><br>This chart is based on the One View Equipment Status Inquiry program (P13400).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Manufacturer<br>• Product Family<br>• Product Model |
| Alert Level (P1310X\|W1310XA) | Use this chart to review the alert metrics for an equipment.<br><br>This chart is based on the Condition-Based Alerts Workbench program (P1310).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Product Family<br>• Product Model<br>• Manufacturer |
| Total Equipment Days by Location (P13230X\|W13230XA) | Use this chart to review the idle locations for a piece of equipment.<br><br>This chart is based on the One View Equipment Location Inquiry program (P13230).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Product Family<br>• Product Model<br>• Manufacturer |

For additional information about the programs associated with these charts, see these topics:

- *One View Equipment Status Inquiry (P13400) in the JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Entering Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *One View Equipment Location Inquiry (P13230)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Asset Reliability page:

| Task | Description |
|---|---|
| Meter Readings | Use this task to access the Meter Readings program (P12120, version ZJDE0001), where you can review meter readings to identify underutilized and obsolete equipment.<br><br>The following form layout is available:<br><br>• Review Meter Readings<br>**Note:** To use the Review Meter Readings form layout, you must set the equipment number as the default primary number for the equipment in the Fixed Asset Constants program (P001012). If you set the unit number or serial number as the default primary number, the system may display an error.<br><br>The following grid format is available:<br><br>• Lifetime Meter Readings |
| Condition Based Alerts | Use this task to access the Condition-Based Alerts Workbench program (P1310, version ZJDE0001), where you can review alert data and generate recommendations to replace, rebuild, or repair equipment. |
| Failure Analysis | Use this task to access the Work with Failure Analysis program (P17766, version ZJDE0001), where you can review failure analysis data. |
| Equipment Status History | Use this task to access the Status History program (P1307, version ZJDE0001), where you can review equipment status history.<br><br>The following grid format is available:<br><br>• Status History |
| Equipment Work Orders | Use this task to access the Work With Work Orders program (P48201, version ZJDE0001), where you can review work order data.<br><br>The following form layout is available:<br><br>• CAM Work Order Revisions<br>The following grid format is available:<br><br>• CAM Work Orders |
| Equipment Master | Use this task to access the Work with Equipment Master program (P1701, version ZJDE0002), where you can review equipment master information to ensure that the financial data of the equipment is accurate.<br><br>The following form layout is available:<br><br>• Maintain Equipment Master<br>The following grid format is available:<br><br>• WW Equipment<br>The following personal form is available: |

| Task | Description |
| --- | --- |
| | • Equipment Master |

For additional information about the programs accessed by these tasks, see:

- *Entering Meter Readings* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Entering Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Setting Up Failures, Analyses, and Resolutions* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Tracking Equipment Status* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Creating Work Orders Using the Work Order Entry Programs (P48201 and P17714)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Creating Equipment Master Records Manually* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

# 19 Capital Asset Management Roles: Maintenance Manager

## Understanding the Maintenance Manager UX One Role

The Maintenance Manager role, and the associated UX One pages and components, enable users to receive important alerts, analyze data, and act on the information they see. The pages provide equipment maintenance management with important equipment-related alerts that require attention, and enable users to view a snapshot of important data associated with their team's work load, schedule compliance, equipment reliability, and cost performance.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Maintenance Manager role (MNTMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the MNTMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Maintenance Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Capital Asset Management.*

# Using the Maintenance Manager UX One Role

You use the Maintenance Manager role to access these UX One pages:

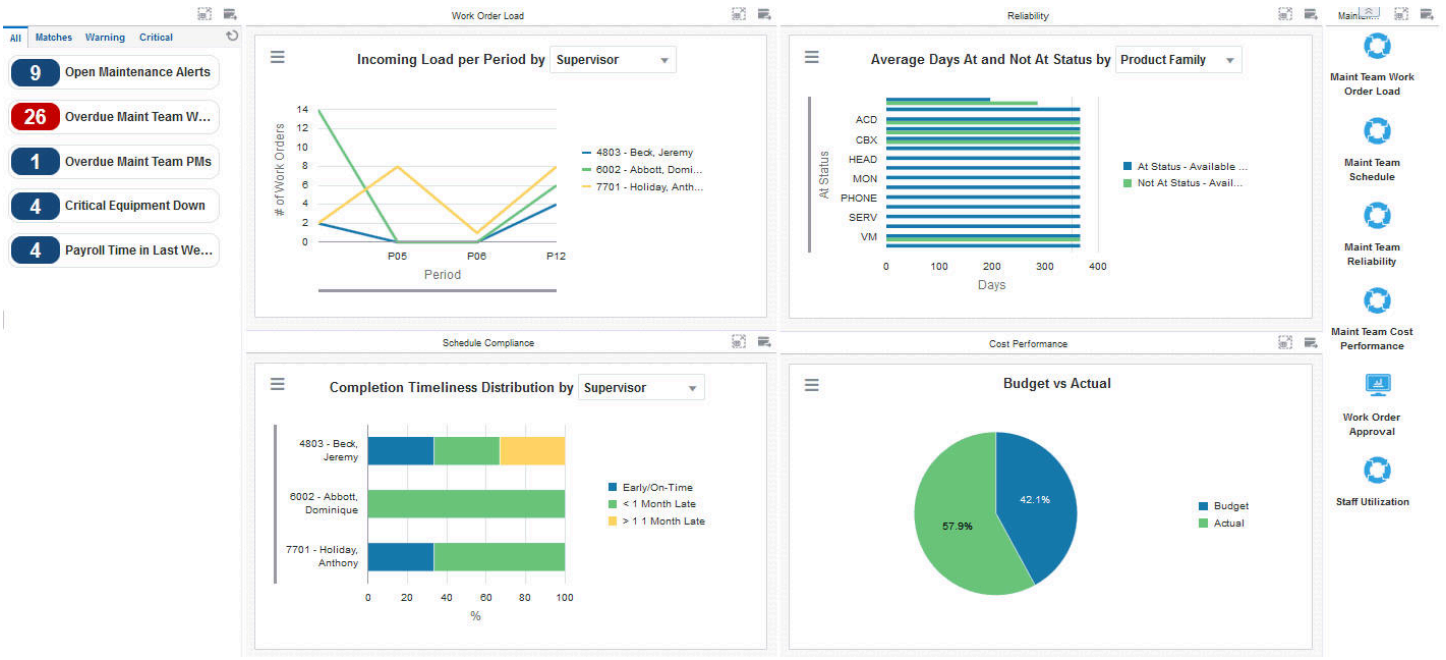
- Maintenance Mgr (P13002X|W13002XA)
- Maint Team Work Order Load (P13002X|W13002XB)
- Maint Team Schedule (P13002X|W13002XC)
- Maint Team Reliability (P13002X|W13002XD)
- Maint Team Cost Performance (P13002X|W13002XE)

## UX One: Maintenance Manager Page

The Maintenance Manager page (P13002X|W13002XA) enables users to receive alerts, analyze equipment data, and access programs and additional UX One pages to easily manage maintenance activities.

To access the UX One Maintenance Manager page, log in to the EnterpriseOne system using the Maintenance Manager role.

This graphic illustrates the Maintenance Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Manager page:

| Watchlist Alert | Description |
|---|---|
| Open Maintenance Alerts | This alert tells users how many alerts are currently open.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310). When you click the alert, the system displays the Work With Condition-Based Alerts form. |
| Overdue Maint Team WOs | This alert tells users how many work orders are currently overdue. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Planning Workbench program (P13700). When you click on the alert, the system displays the One View Equipment Work Order Analysis Inquiry form. The following form layout is available:<br>• Equipment WOs |
| Overdue Maint Team PMs | This alert tells users how many preventive maintenance records are currently overdue.<br>This alert is based on the Preventive Maintenance backlog program (P12071, version ZJDE0001). When you click the alert, the system displays the PM Backlog form. |
| Critical Equipment Down | This alert tells users how many pieces of equipment are currently at a down status.<br>This alert is based on the Equipment Master program (P1701). When you click the alert, the system displays the Work With Equipment Master form. The following form layout is available:<br>• Equipment Details<br>The following grid format is available:<br>• Simple |
| Payroll Time in Last Week | This alert tells users how many payroll timecards have been entered in the last week.<br>This alert is based on the Speed Time Entry program (P051121). When you click this alert, the system displays the Work With Time Entry by Individual form. The following grid format is available:<br>• Timecards |

For additional information about the programs associated with these alerts, see:

- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Managing Equipment* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Entering Timecards Using Speed Time Entry* in the *JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide*

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Manager page:

| Chart | Description |
|---|---|
| Incoming Load Per Period (P13560X\|W13560XC) | Use this chart to view the incoming work order load for the period.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor |
| Average Days At and Not At Status (P13400X\|W13400XA) | Use this chart to view the number of days that equipment has been at or not at a specified status.<br><br>This chart is based on the One View Equipment Status Inquiry program (P13400).<br><br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Manufacturer<br>• Product Family |
| Completion Timeliness Distribution (P13560X\|W13560XA) | Use chart to view completion timeliness statistics for work orders.<br><br>This chart is based on the One View Equipment Work Orders Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Lead Craft<br>• Product Family<br>• Supervisor |
| Budget vs Actual (P09217X\|W09217XD) | Use this chart to view budgeted amounts in comparison to actual amounts for equipment cost accounts.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217, version ZJDE0002). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Work Order Analysis (P13560)*
- *One View Equipment Status Inquiry (P13400)*
- *One View Account Balance Inquiry (P09217)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maintenance Manager page:

| Task | Description |
|---|---|
| Maint Team Work Order Load | Use this task to access the Maint Team Work Order Load UX One page. |
| Maint Team Schedule | Use this task to access the Maint Team Schedule UX One page. |
| Maint Team Reliability | Use this task to access the Maint Team Reliability UX One page. |
| Maint Team Cost Performance | Use this task to access the Maint Team Cost Performance UX One page. |
| Work Order Approval | Use this task to access the Employee Queue Manager program (P012503, version ZJDE0001), which you can use to approve work orders. When you click this task, the system takes you to the Work Order Approval - Work Center form. |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |

For additional information about the programs accessed by these tasks, see:

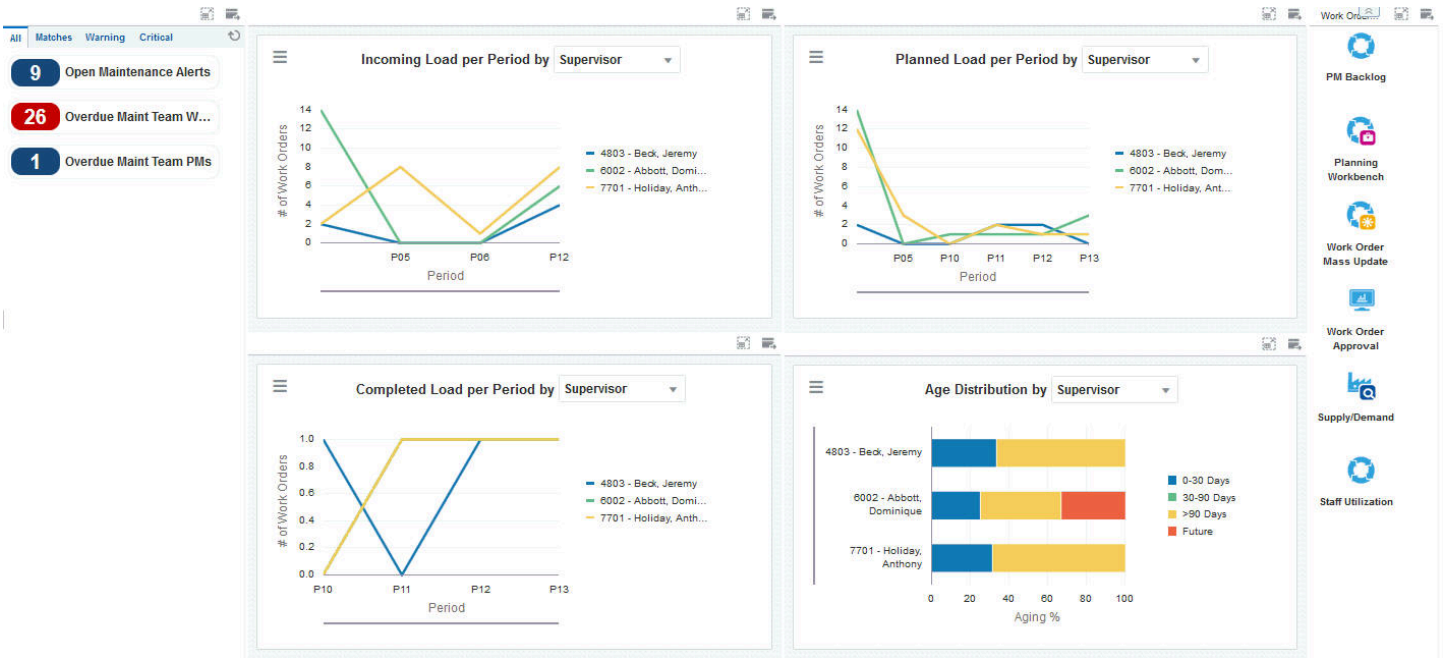
- *Approving Work Orders* in the *JD Edwards EnterpriseOne Applications Work Orders Implementation Guide*
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# UX One: Maint Team Work Order Load Page

The Maint Team Work Order Load page (P13002X|W13002XB) enables maintenance managers to easily view information about upcoming, planned, and completed work order load for their teams.

To access the UX One Maint Team Work Order Load page, log in to the EnterpriseOne system using the Maintenance Manager role. When you log in with this role, the system automatically displays the Maintenance Manager page. Click the Maint Team Work Order Load task on the springboard to access the Maint Team Work Order Load page.

This graphic illustrates the Maint Team Work Order Load page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maint Team Work Order Load page:

| Watchlist Alert | Description |
|---|---|
| Open Maintenance Alerts | This alert tells users how many alerts are currently open.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310). When you click the alert, the system displays the Work With Condition-Based Alerts form. |
| Overdue Maint Team WOs | This alert tells users how many work orders are currently overdue. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Planning Workbench program (P13700). When you click on the alert, the system displays the One View Equipment Work Order Analysis Inquiry form. The following form layout is available:<br>• Equipment WOs |
| Overdue Maint Team PMs | This alert tells users how many preventive maintenance records are currently overdue.<br>This alert is based on the Preventive Maintenance backlog program (P12071, version ZJDE0001). When you click the alert, the system displays the PM Backlog form. |

For additional information about the programs associated with these alerts, see:

- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maint Team Work Order Load page:

| Chart | Description |
|---|---|
| Incoming Load Per Period (P13560X\|W13560XC) | Use this chart to view the incoming work order load for the period.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |
| Planned Load Per Period (P13560X\|W13560XD) | Use this chart to view the planned work order load for the period.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |
| Completed Load Per Period (P13560X\|W13560XE) | Use this chart to view the completed work order load for the period. |

| Chart | Description |
|---|---|
| | This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor |
| Age Distribution (P13560X\|W13560XB) | Use this chart to view work order aging information.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor |

For additional information about the programs associated with these charts, see *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maint Team Work Order Load page:

| Task | Description |
|---|---|
| PM Backlog | Use this task to access the Preventive Maintenance Backlog program (P12071, version ZJDE0001). When you click this task, the system takes you to the PM Backlog form. |
| Planning Workbench | Use this task to access the Planning Workbench program (P13700, version ZJDE0001). When you click this task, the system takes you to the Planning Workbench - Search for Equipment Work Orders form. |
| Work Order Mass Update | Use this task to access the Search for Work Orders program (P48022, version ZJDE0001). When you click this task, the system takes you to the Work Order Mass Update - Search for Equipment Work Orders form. |
| Work Order Approval | Use this task to access the Employee Queue Manager program (P012503, version ZJDE0001), which you can use to approve work orders. When you click this task, the system takes you to the Work Order Approval - Work Center form. |
| Supply/Demand | Use this task to access the Supply and Demand Inquiry program (P4021, version ZJDE0001). When you click this task, the system brings you to the Supply/Demand - Work With Supply and Demand form. |

For additional information about the programs accessed by these tasks, see:

- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Using the Work Order Mass Update Process* in the *JD Edwards EnterpriseOne Applications Work Orders Implementation Guide*
- *Approving Work Orders* in the *JD Edwards EnterpriseOne Applications Work Orders Implementation Guide*
- *Analyzing Supply and Demand* in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*

# UX One: Maint Team Schedule Page

The Maint Team Schedule page (P13002X|W13002XC) enables maintenance managers to quickly view and act on schedule compliance data. The page displays actual hours, hours variance, and PM fulfillment data, and alerts users to any overdue work orders or preventive maintenance records.

To access the UX One Maint Team Schedule page, log in to the EnterpriseOne system using the Maintenance Manager role. When you log in with this role, the system automatically displays the Maintenance Manager page. Click the Maint Team Schedule task on the springboard to access the Maint Team Schedule page.

This graphic illustrates the Maint Team Schedule page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maint Team Schedule page:

| Watchlist Alert | Description |
|---|---|
| Overdue Maint Team WOs | This alert tells users how many work orders are currently overdue.<br><br>This alert is based on the Planning Workbench program (P13700). When you click on the alert, the system displays the One View Equipment Work Order Analysis Inquiry form. The following form layout is available:<br><br>• Equipment WOs |
| Overdue Maint Team PMs | This alert tells users how many preventive maintenance records are currently overdue. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Preventive Maintenance backlog program (P12071, version ZJDE0001). When you click the alert, the system displays the PM Backlog form. |

For additional information about the programs associated with these alerts, see these topics in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide:*

- *Creating Work Orders Using the Planning Workbench Program (P13700)*
- *Working with Preventive Maintenance Schedules*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maint Team Schedule page:

| Chart | Description |
|---|---|
| Total Hours Variance (P13560X\|W13560XH) | Use this chart to view the hours variance.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Equipment<br>• Product Family |
| Total Actual Hours (P13560X\|W13560XR) | Use this chart to view the total number of actual hours.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br>• Equipment<br>• Product Family |
| Average PM Fulfillment by Service Type (P13570X\|W13570XC) | Use this chart to view the average preventive maintenance fulfillment data by service type.<br>This chart is based on the One View PM Analysis program (P13570).<br>Additionally, you can use the Begin Date and End Date fields to adjust the date range for the chart. |
| Quantity Ordered, Quantity Received and Expected Receipt Quantity by Item (P43261X\|W43261XA) | Use this chart to view quantity ordered and received, and also the expected receipt quantity by item.<br>This chart is based on the One View Purchase Order Inquiry program (P43261). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Order Analysis (P13560)*
- *One View PM Analysis (P13570)*
- *One View Purchase Order Inquiry (P43261)*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maint Team Schedule page:

| Task | Description |
|---|---|
| Planning Workbench | Use this task to access the Planning Workbench program (P13700, version ZJDE0001). When you click this task, the system takes you to the Planning Workbench - Search for Equipment Work Orders form. |
| Supply/Demand | Use this task to access the Supply and Demand Inquiry program (P4021, version ZJDE0001). When you click this task, the system brings you to the Supply/Demand - Work With Supply and Demand form. |
| PM Backlog | Use this task to access the Preventive Maintenance Backlog program (P12071, version ZJDE0001). When you click this task, the system takes you to the PM Backlog form. |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |

For additional information about the programs accessed by these tasks, see:

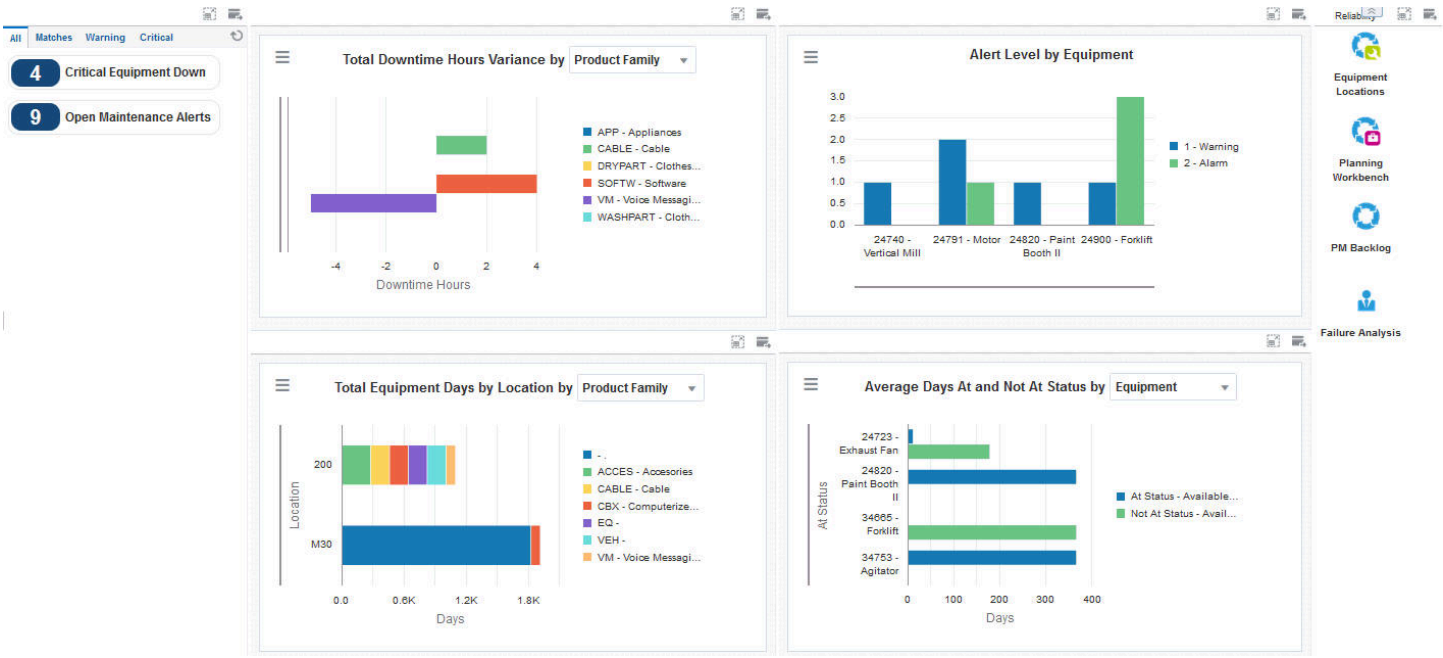
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Analyzing Supply and Demand* in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*
- *View the Staff Utilization Chart* in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# UX One: Maint Team Reliability Page

The Maint Team Reliability page (P13002X|W13002XD) enables maintenance managers to quickly gain insight into the reliability data of their assets and equipment.

To access the UX One Maint Team Reliability page, log in to the EnterpriseOne system using the Maintenance Manager role. When you log in with this role, the system automatically displays the Maintenance Manager page. Click the Maint Team Reliability task on the springboard to access the Maint Team Reliability page.

This graphic illustrates the Maint Team Reliability page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maint Team Reliability page:

| Watchlist Alert | Description |
|---|---|
| Critical Equipment Down | This alert tells users how many pieces of equipment are currently at a down status.<br><br>This alert is based on the Equipment Master program (P1701). When you click the alert, the system displays the Work With Equipment Master form. The following form layout is available:<br><br>• Equipment Details<br>The following grid format is available:<br><br>• Simple |

| Watchlist Alert | Description |
|---|---|
| Open Maintenance Alerts | This alert tells users how many alerts are currently open.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310). When you click the alert, the system displays the Work With Condition-Based Alerts form. |

For additional information about the programs associated with these alerts, see:

- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Managing Equipment* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maint Team Reliability page:

| Chart | Description |
|---|---|
| Total Downtime Hours Variance (P13560X\|W13560XI) | Use this chart to view the downtime hours variance.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Equipment<br>• Product Family |
| Alert Level by Equipment (P1310X\|W1310XA) | Use this chart to view the alert level for each piece of equipment.<br><br>This chart is based on the Condition-Based Alerts Workbench program (P1310). |
| Total Equipment Days By Location (P13230X\|W13230XA) | Use this chart to view the total number of equipment days by location.<br><br>This chart is based on the One View Equipment Location Inquiry program (P13230).<br><br>Additionally, you can use the drop-down menu at the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Product Family |
| Average Days At and Not At Status (P13400X\|W13400XA) | Use this chart to view the number of days equipment items have been at or not at a specified status.<br><br>This chart is based on the One View Equipment Status Inquiry program (P13400). |

| Chart | Description |
|---|---|
| | Additionally, you can use the drop-down menu at the top of the chart to change the data that the system displays. You can select one of these options:<br>• Equipment<br>• Manufacturer<br>• Product Family |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Order Analysis (P13560)*
- *One View Equipment Location Inquiry (P13230)*
- *One View Equipment Status Inquiry (P13400)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maint Team Reliability page:

| Task | Description |
|---|---|
| Equipment Locations | Use this task to access the Work With Locations program (P12215, version ZJDE0001). When you click the task, the system takes you to the Equipment Locations - Work With Locations form. |
| Planning Workbench | Use this task to access the Planning Workbench program (P13700, version ZJDE0001). When you click this task, the system takes you to the Planning Workbench - Search for Equipment Work Orders form. |
| PM Backlog | Use this task to access the Preventive Maintenance Backlog program (P12071, version ZJDE0001). When you click this task, the system takes you to the PM Backlog form. |
| Failure Analysis | Use this task to access the Work With Failure Analysis program (P17766, version ZJDE0001). When you click this task, the system takes you to the Failure Analysis - Work with Failure Analysis form. |

For additional information about the programs accessed by these tasks, see:

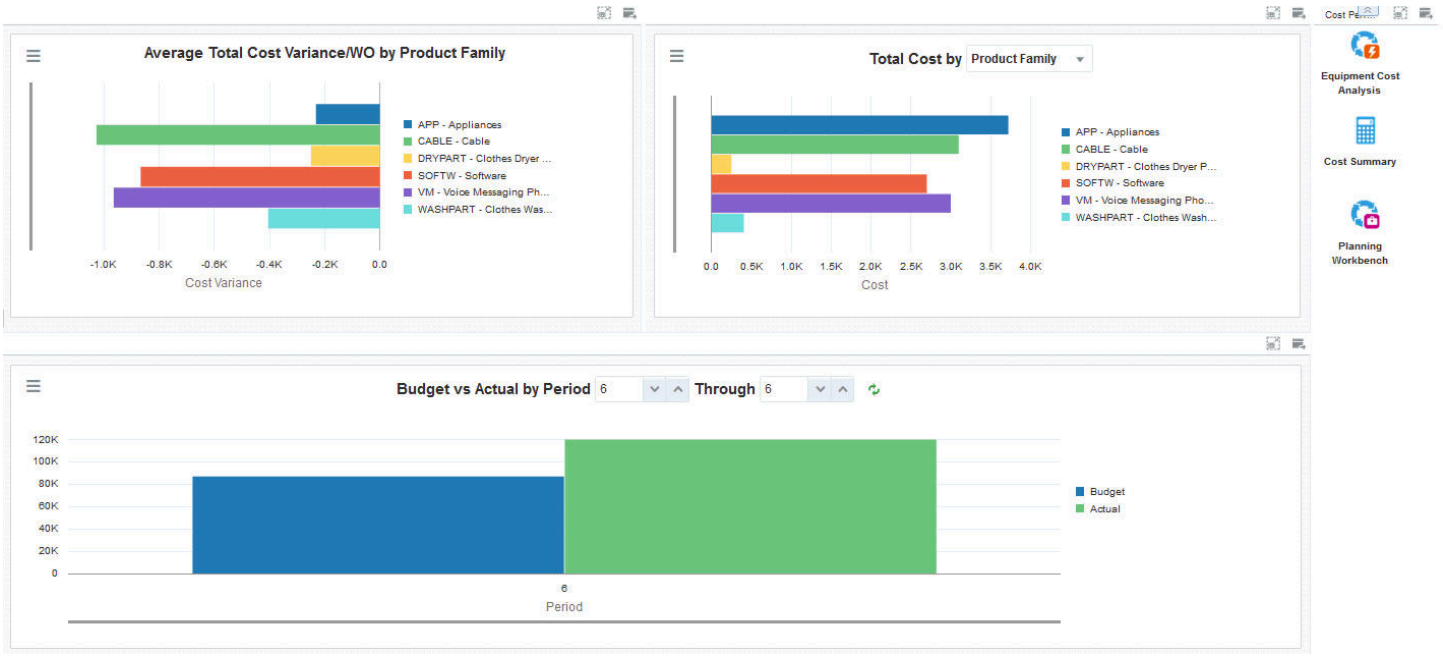
- *Creating Asset Identification Information* in the *JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide*
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Failure Analysis* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

# UX One: Maint Team Cost Performance Page

The Maint Team Cost Performance page (P13002X|W13002XD) enables maintenance managers to view overall cost performance data for their assets and equipment. THe page provides a snapshot of current costs, cost variances, and budget amounts as compared to actual amounts. The page also enables users to easily access programs they need to maintain or update equipment cost data.

To access the UX One Maint Team Cost Performance page, log in to the EnterpriseOne system using the Maintenance Manager role. When you log in with this role, the system automatically displays the Maintenance Manager page. Click the Maint Team Cost Performance task on the springboard to access the Maint Team Cost Performance page.

This graphic illustrates the Maint Team Cost Performance page:




### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maint Team Cost Performance page:

| Chart | Description |
|---|---|
| Average Total Cost Variance/WO by Product Family (P13560X\|W13560XN) | Use this chart to view the average total cost variance by product family.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560). |
| Total Cost (P13560X\|W13560XG) | Use this chart to view the total cost of work orders.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu at the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Product Family<br>• Product Model |
| Budget vs Actual by Period (P09217X\|W09217XD) | Use this chart to view budgeted and actual amounts for selected periods.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217).<br><br>Additionally, you can use the fields at the top of the chart to specify your period range. |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Order Analysis (P13560)*
- *One View Account Balance Inquiry (P09217)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maint Team Cost Performance page:

| Task | Description |
|---|---|
| Equipment Cost Analysis | Use this task to access the Equipment Cost Analysis program (P13801, version ZJDE0001). When you click the task, the system takes you to the Equipment Cost Analysis - Work with Equipment Cost Analysis form. |
| Cost Summary | Use this task to access the Cost Summary program (P122101, version ZJDE0001). When you click this task, the system takes you to the Cost Summary - Work With Cost Summary form. |
| Planning Workbench | Use this task to access the Planning Workbench program (P13700, version ZJDE0001). When you click this task, the system takes you to the Planning Workbench - Search for Equipment Work Orders form. |

For additional information about the programs accessed by these tasks, see:

- *Setting Up Equipment Cost Analysis* in the *JD Edwards EnterpriseOne Applications Equipment Cost Analysis Implementation Guide*
- *Reviewing Asset and Maintenance Costs* in the *JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide*

# 20 Capital Asset Management Roles: Maintenance Scheduler (Release 9.2 Update)

## Understanding the Maintenance Scheduler UX One Role

The Maintenance Scheduler role, and the associated UX One pages and components, enable users to receive alerts, analyze data, and access related programs to enable them to take action, if required.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Maintenance Scheduler role (MNTSCHJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the MNTSCHJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Maintenance Scheduler role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Capital Asset Management*.

# Using the Maintenance Scheduler UX One Role

You use the Maintenance Scheduler role to access these UX One pages:

- Maintenance Scheduler (P13005X|W13005XA)
- Maintenance Load (P13005X|W13005XB)
- Maintenance Downtime (P13005X|W13005XC)

## UX One: Maintenance Scheduler Page

The Maintenance Scheduler page (P13005X|W13005XA) enables users to receive alerts about unassigned emergency and maintenance work orders, analyze asset data, and access related programs and additional UX One pages.

To access the UX One Maintenance Scheduler page, log in to the EnterpriseOne system using the Maintenance Scheduler role.

This graphic illustrates the Maintenance Scheduler page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs and business views. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Scheduler page:

| Watchlist Alert | Description |
|---|---|
| Unassigned Emergency Work Orders | This alert displays the number of unassigned emergency work orders.<br><br>This alert is based on the Planning Workbench program (P13700, version ZJDE0001). When you click this alert, the system displays the Search for Equipment Work Orders form.<br><br>The following grid format is available:<br><br>• Basic<br>The following personal form is available:<br><br>• Planning Workbench |
| Unassigned Maintenance Work Orders | This alert displays the number of unassigned maintenance work orders.<br><br>This alert is based on the Planning Workbench program (P13700, version ZJDE0001). When you click this alert, the system displays the Search for Equipment Work Orders form.<br><br>The following grid format is available:<br><br>• Basic<br>The following personal form is available:<br><br>• Planning Workbench |

For additional information about the programs associated with these watchlist alerts, see *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Scheduler page:

| Component Title | Description |
|---|---|
| Total Hours Variance (P13560X\|W13560XH) | Use this chart to view the total hours variance based on the assignee, equipment, or product family.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Equipment<br>• Product Family |
| Age Distribution (P13560X\|W13560XB) | Use this chart to analyze the age of the equipment work orders.<br><br>This chart is based on the One View Work Order Analysis program (P13560). |

| Component Title | Description |
|---|---|
| | Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Business Unit<br>• Supervisor<br>• WO Type |
| Average PM Fulfillment by Service Type (P13570X\|W13570XC) | Use this chart to view the average fulfillment percentage for each service type.<br>This chart is based on the One View PM Analysis program (P13570). |
| Availability by Product Family (P13400X\|W13400XB) | Use this chart to compare the percentage of time available against the average downtime for each product family.<br>This chart is based on the One View Equipment Status Inquiry program (P13400).<br>**Note:** To enable the system to display the chart, you must set the value of the Equipment Status processing option for the P13400 program to indicate that the equipment is available. |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* :

- *One View Work Order Analysis (P13560)*
- *One View PM Analysis (P13570)*
- *One View Equipment Status Inquiry (P13400)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maintenance Scheduler page:

| Task | Description |
|---|---|
| PM Backlog | Use this task to access the Preventative Maintenance Backlog program (P12071, version ZJDE0001).<br>The following grid format is available:<br>• Basic |
| Planning Workbench | Use this task to access the Planning Workbench program (P13700, version ZJDE0001).<br>The following grid format is available:<br>• Basic<br>The following personal form is available:<br>• Planning Workbench |
| WO Mass Update | Use this task to access the Search for Work Orders program (P48022, version ZJDE0001). |

| Task | Description |
|---|---|
| | |
| Supply & Demand | Use this task to access the Supply and Demand Inquiry program (P4021, version ZJDE0003). |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |
| Resource Assignments | Use this task to access the Resource Assignment program (P48331). |
| Maintenance Load | Use this task to access the Maintenance Load page. |
| Maintenance Downtime | Use this task to access the Maintenance Downtime page. |

For additional information about the programs accessed by these tasks, see:

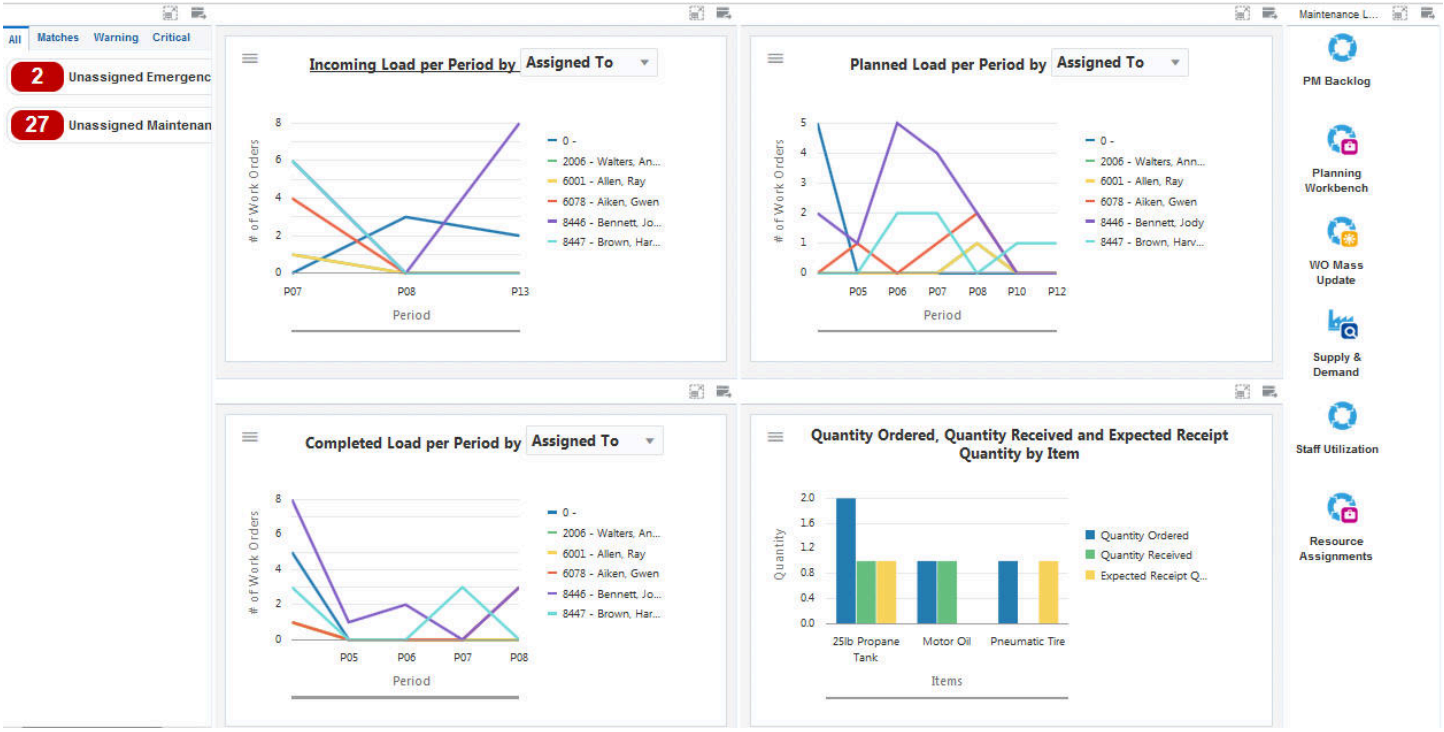
- *Changing the Status of PMs to Complete* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Understanding Work Order Mass Updates for Equipment Work Orders* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Reviewing Supply-and-Demand Information* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Viewing the Staff Utilization Chart* in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*
- *Reviewing Work Orders in the JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# UX One: Maintenance Load Page

The Maintenance Load page (P13005X|W13005XB) enables maintenance schedulers to receive notification alerts about unassigned emergency and maintenance repairs, analyze work order load information, and access related applications to take any required action.

To access the UX One Maintenance Load page, log in to the EnterpriseOne system using the Maintenance Scheduler role. When you log in with this role, the system automatically displays the Maintenance Scheduler page. Click the Maintenance Load task on the springboard to access the Maintenance Load page.

This graphic illustrates the Maintenance Load page:




### Watchlist Alerts

The watchlist alerts on the Maintenance Load page are the same as the watchlist alerts on the Maintenance Scheduler page. See "*Watchlist Alerts*" for the Maintenance Scheduler page.

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Load page:

| Component Title | Description |
|---|---|
| Incoming Load per Period (P13560X\|W13560XC) | Use this chart to analyze the rate at which work orders are created. You can view the incoming work order load for each period based on the assignee, supervisor, or business unit.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor<br>• Business Unit |
| Planned Load per Period (P13560X\|W13560XD) | Use this chart to analyze the rate at which work orders are scheduled. You can view the planned work order load for each period based on the assignee, supervisor, or business unit.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor<br>• Business Unit |
| Completed Load per Period (P13560X\|W13560XE) | Use this chart to analyze the rate at which work orders are completed. You can view the completed work order load for each period based on the assignee, supervisor, or business unit.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor<br>• Business Unit |
| Quantity Ordered, Quantity Received and Expected Receipt Quantity by Item (P43261X\|W43261XA) | Use this chart to compare the quantity ordered, quantity received, and expected receipt quantity for each item that you have availability issues with.<br><br>This chart is based on the One View Purchase Order Inquiry program (P43261).<br><br>**Note:** You should define your query to only analyze the items with which you have availability issues regularly. |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* :

- *One View Work Order Analysis (P13560)*
- *One View Purchase Order Inquiry (P43261)*

### Springboard Tasks

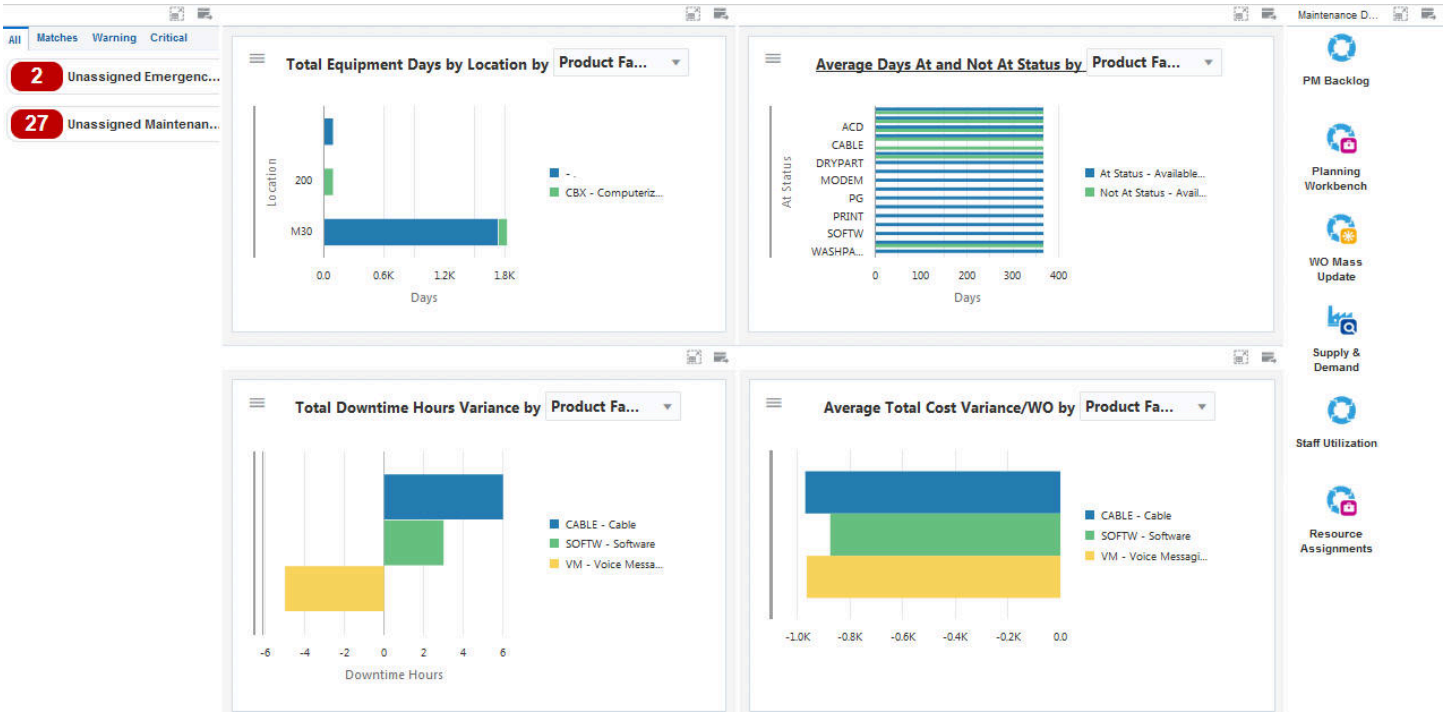
The springboard tasks on the Maintenance Load page are the same as the tasks on the Maintenance Scheduler page. See "*Springboard Tasks*" for the Maintenance Scheduler page.

# UX One: Maintenance Downtime Page

The Maintenance Downtime page (P13005X|W13005XC) enables maintenance schedulers to receive notification alerts about unassigned emergency and maintenance repairs, analyze data related to maintenance downtime, and access related applications to take any required action.

To access the UX One Maintenance Downtime page, log in to the EnterpriseOne system using the Maintenance Scheduler role. When you log in with this role, the system automatically displays the Maintenance Scheduler page. Click the Maintenance Downtime task on the springboard to access the Maintenance Downtime page.

This graphic illustrates the Maintenance Downtime page:



### Watchlist Alerts

The watchlist alerts on the Maintenance Downtime page are the same as the watchlist alerts on the Maintenance Scheduler page. See "*Watchlist Alerts*" for the Maintenance Scheduler page.

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Downtime page:

| Component Title | Description |
|---|---|
| Total Equipment Days by Location (P13230X\|W13230XA) | Use this chart to view the total number of days that an equipment is at each location.<br><br>This chart is based on the One View Equipment Location Inquiry program (P13230).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Product Family<br>• Product Model<br>• Manufacturer |
| Average Days At and Not At Status (P13400X\|W13400XA) | Use this chart to analyze the status history for a piece of equipment.<br><br>This chart is based on the One View Equipment Status Inquiry program (P13400).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Manufacturer<br>• Product Family<br>• Product Model |
| Total Downtime Hours Variance (P13560X\|W13560XI) | Use this chart to view the total downtime hours variance based on the assignee, equipment, product family, or product model.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Equipment<br>• Product Family<br>• Product Model |

| Component Title | Description |
|---|---|
| Average Total Cost Variance/WO (P13560X\|W13560XF) | Use this chart to view the average total cost variance for your work orders based on the product family or site.<br><br>This chart is based on the One View Work Order Analysis program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Product Family<br>• Site |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* :

- *One View Equipment Location Inquiry (P13230)*
- *One View Equipment Status Inquiry (P13400)*
- *One View Work Order Analysis (P13560)*

### Springboard Tasks

The springboard tasks on the Maintenance Load page are the same as the tasks on the Maintenance Scheduler page. See "*Springboard Tasks*" for the Maintenance Scheduler page.

# 21 Capital Asset Management Roles: Maintenance Supervisor

## Understanding the Maintenance Supervisor UX One Role

The Maintenance Supervisor role, and the associated UX One pages and components, enable users to receive important alerts, analyze data, and act on the information they see. The pages provide equipment maintenance management with important equipment-related alerts that require attention, and enable users to view a snapshot of important data associated with their team's work load, schedule compliance, and downtime.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Maintenance Supervisor role (MNTSPVJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the MNTSPVJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Maintenance Supervisor role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Capital Asset Management.*

# Using the Maintenance Supervisor UX One Role

You use the Maintenance Supervisor role to access these UX One pages:

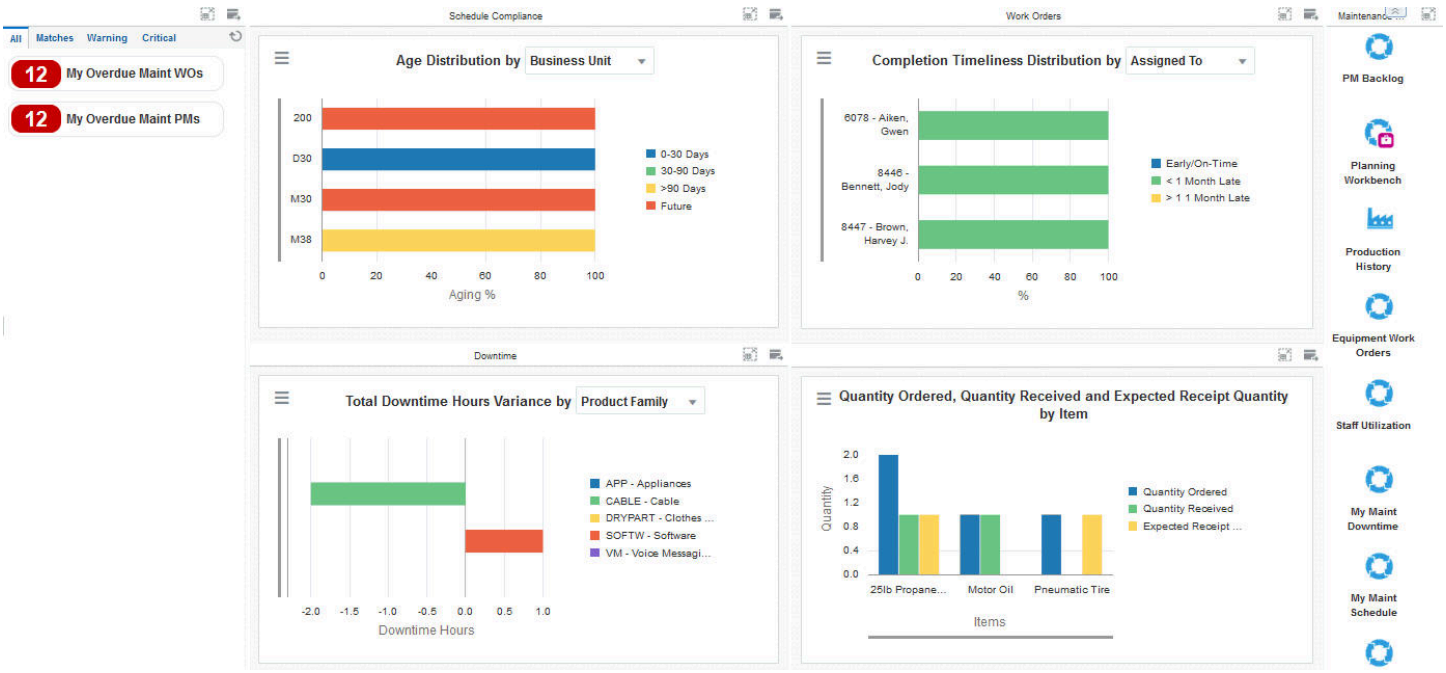
- Maintenance Supervisor (P13001X|W13001XA)
- My Maint Downtime (P13001X|W13001XB)
- My Maint Schedule (P13001X|W13001XC)
- My Maint Work Order Load (P13001X|W13001XD)

## UX One: Maintenance Supervisor Page

The Maintenance Supervisor page (P13001X|W13001XA) enables users to receive alerts, analyze asset data, and access programs and additional UX One pages to easily manage work order load, downtime, and schedule compliance.

To access the UX One Maintenance Supervisor page, log in to the EnterpriseOne system using the Maintenance Supervisor role.

This graphic illustrates the Maintenance Supervisor page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Supervisor page:

| Watchlist Alert | Description |
|---|---|
| My Overdue Maint WOs | This alert tells users how many work orders are currently overdue.<br><br>This alert is based on the Planning Workbench program (P13700).<br><br>When you click the alert, the system displays the Search for Equipment Work Orders form. |
| My Overdue Maint PMs | This alert tells users how many preventative maintenance records are currently overdue.<br><br>This alert is based on the Preventive Maintenance Backlog program (P12071). |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the PM Backlog form. |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*:

- *Working with Preventive Maintenance Schedules*
- *Working With Orders*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Supervisor page:

| Component Title | Description |
|---|---|
| Age Distribution (P13560X\|W13560XB) | Use this chart to view work order aging information.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor |
| Completion Timeliness Distribution (P13560X\|W13560XA) | Use this chart to view completion timeliness statistics for work orders.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor<br>• Product Family<br>• Lead Craft |
| Total Downtime Hours Variance (P13560X\|W13560XI) | Use this chart to view the downtime hours variance for your work orders.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Equipment<br>• Product Family |

| Component Title | Description |
|---|---|
| Quantity Ordered, Quantity Received and Expected Receipt Quantity by Item (P43261X\|W43261XA) | Use this chart to view quantity ordered and received, and also the expected receipt quantity by item.<br><br>This chart is based on the One View Purchase Order Inquiry program (P43261). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Work Order Analysis (P13560)*
- *One View Purchase Order Inquiry (P43261)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maintenance Supervisor page:

| Task | Description |
|---|---|
| PM Backlog | Use this task to access the Preventative Maintenance Backlog program (P12071, version ZJDE0001). When you click this task, the system takes you to the PM Backlog form. |
| Planning Workbench | Use this task to access the Planning Workbench program (P13700, version ZJDE0001). When you click this task, the system takes you to the Planning Workbench - Search for Equipment Work Orders form. |
| Production History | Use this task to access the Production History program (P31227, version ZJDE0002). When you click this task, the system takes you to the Work With Production History form. |
| Equipment Work Orders | Use this task to access the Work With Equipment Work Orders program (P13220, version ZJDE0001). When you click this task, the system takes you to the Work With Equipment Work Orders form. The following form layout is available:<br><br>• Work Order Details<br>The following grid format is available:<br><br>• Simple |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |
| My Maint Downtime | Use this task to access the My Maint Downtime UX One page. |
| My Maint Schedule | Use this task to access the My Maint Schedule UX One page. |
| My Maint Work Order Load | Use this task to access the My Maint Work Order Load UX One page. |

For additional information about the programs accessed by these tasks, see:

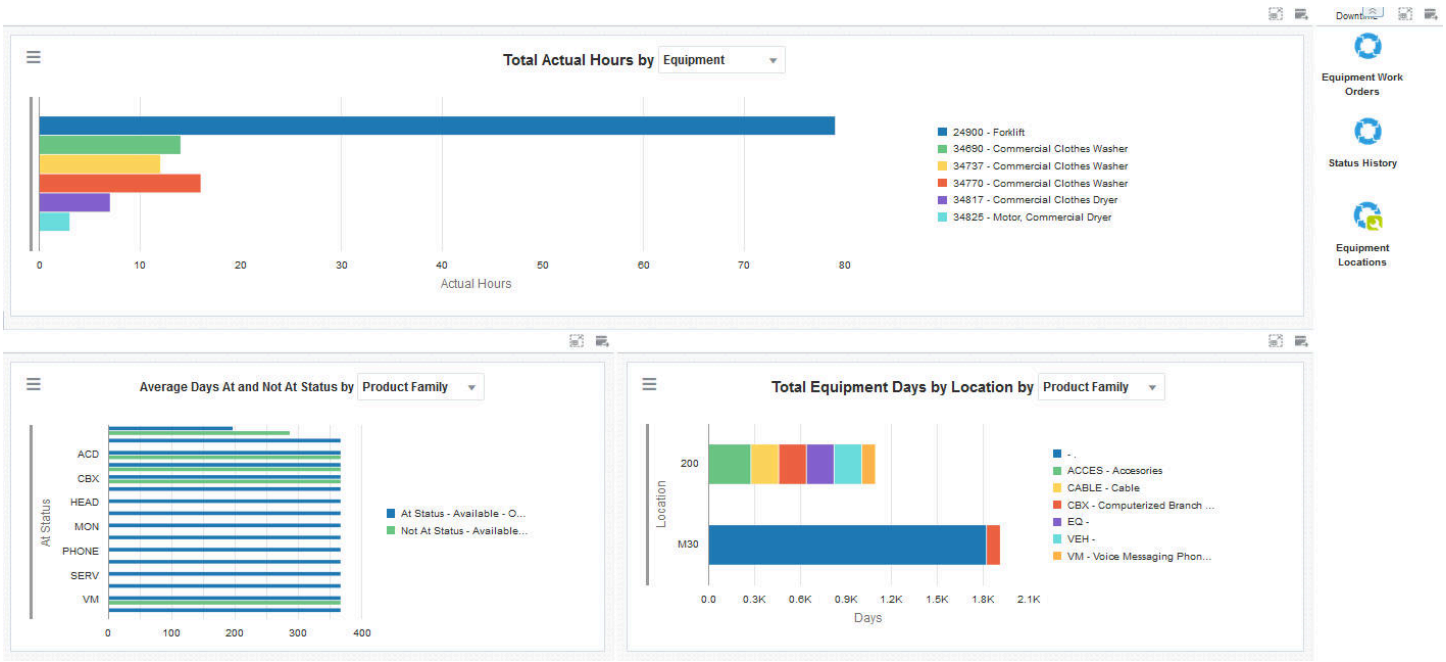
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide .*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide.*
- *Managing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide .*
- *Processing Work Orders* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide .*
- *Viewing the Staff Utilization Chart* in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide .*

# UX One: My Maint Downtime Page

The My Maint Downtime page (P13001X|W13001XB) enables users to quickly gain insight into the usage and downtime data of their assets and equipment. The page also provides easy access to programs that enable users to act on the analytical data they see.

To access the UX One My Maint Downtime page, log in to the EnterpriseOne system using the Maintenance Supervisor role. When you log in with this role, the system automatically displays the Maintenance Supervisor page. Click the My Maint Downtime task on the springboard to access the My Maint Downtime page.

This graphic illustrates the My Maint Downtime page:




## Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the My Maint Downtime page:

| Component Title | Description |
|---|---|
| Total Actual Hours (P13560X\|W13560XR) | Use this chart to view the total number of actual hours for your work orders.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Product Family |

| Component Title | Description |
|---|---|
| Average Days At and Not At Status (P13400X\|W13400XA) | Use this chart to view the number of days that equipment items have been at or not at a specified status.<br><br>This chart is based on the One View Equipment Status Inquiry program (P13400, version ZJDE0002).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Manufacturer<br>• Product Family |
| Total Equipment Days by Location (P13230X\|W13230XA) | Use this chart to view the total number of equipment days by location.<br><br>This chart is based on the One View Equipment Location Inquiry program (P13230, version ZJDE0002).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Equipment<br>• Product Family |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Work Order Analysis (P13560)*
- *One View Equipment Status Inquiry (P13400)*
- *One View Equipment Location Inquiry (P13230)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the My Maint Downtime page:

| Task | Description |
|---|---|
| Equipment Work Orders | Use this task to access the Work With Equipment Work Orders program (P13220, version ZJDE0001). When you click this task, the system takes you to the Work With Equipment Work Orders form. The following form layout is available:<br><br>• Work Order Details<br>The following grid format is available:<br><br>• Simple |
| Status History | Use this task to access the Status History program (P1307, version ZJDE0001). When you click this task, the system takes you to the Status History - Work With Status History form. You must enter an equipment number and click Find.<br><br>The following grid format is available: |

| Task | Description |
| --- | --- |
| | • Basic |
| Equipment Locations | Use this task to access the Work With Locations program (P12215, version ZJDE0001).<br>When you click this task, the system takes you to the Equipment Locations - Work With Locations form.<br>The following grid format is available:<br>• Basic |

For additional information about the programs accessed by these tasks, see:

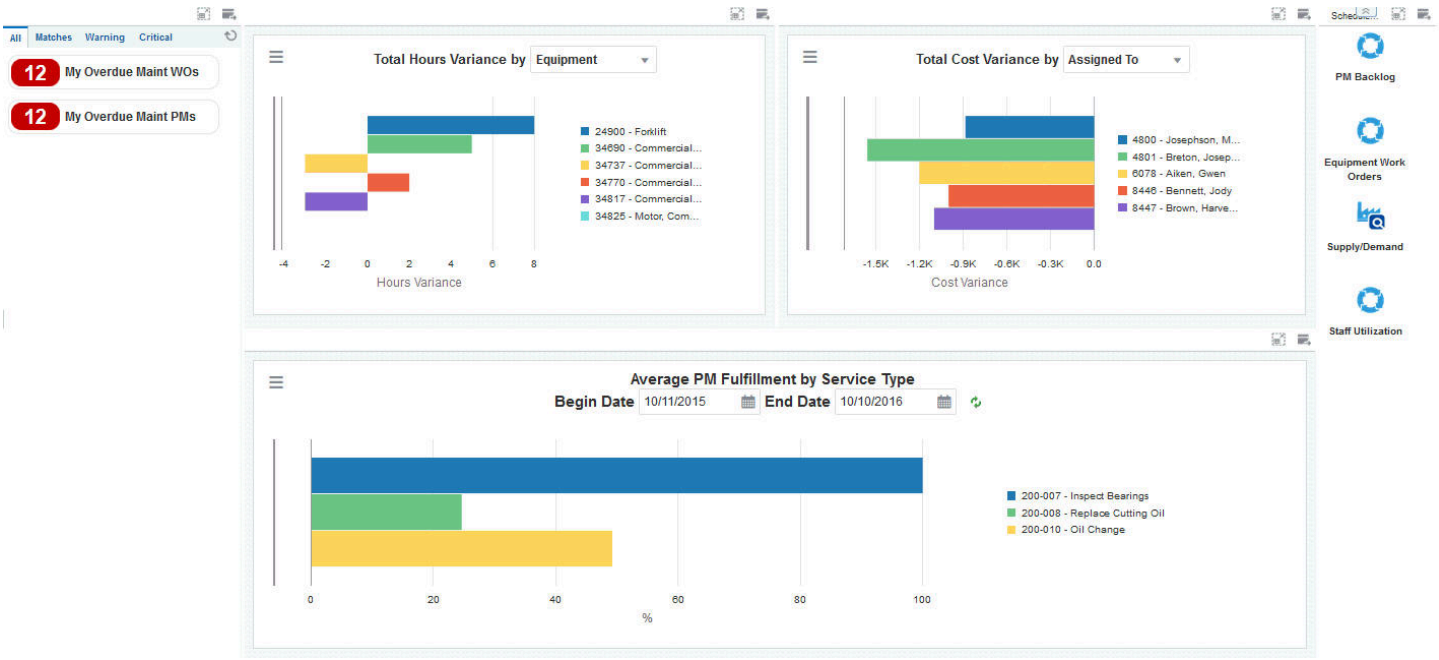
- *Processing Work Orders* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Working With Status History* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *One View Equipment Status Inquiry (P13400)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *One View Equipment Location Inquiry (P13230)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

# UX One: My Maint Schedule Page

The My Maint Schedule page (P13001X|W13001XC) enables users to quickly view and act on schedule compliance data. The page displays actual hours, hours variance, and PM fulfillment data, and alerts users to any overdue work orders or preventative maintenance records.

To access the UX One My Maint Schedule page, log in to the EnterpriseOne system using the Maintenance Supervisor role. When you log in with this role, the system automatically displays the Maintenance Supervisor page. Click the My Maint Schedule task on the springboard to access the My Maint Schedule page.

This graphic illustrates the My Maint Schedule page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the My Maint Schedule page:

| Watchlist Alert | Description |
|---|---|
| My Overdue Maint WOs | This alert tells users how many work orders are currently overdue.<br>This alert is based on the Planning Workbench program (P13700).<br>When you click the alert, the system displays the Search for Equipment Work Orders form. |
| My Overdue Maint PMs | This alert tells users how many preventative maintenance records are currently overdue.<br>This alert is based on the Preventive Maintenance Backlog program (P12071). |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the PM Backlog form. |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*:

- *Working with Preventive Maintenance Schedules*
- *Working With Orders*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the My Maint Schedule Page:

| Component Title | Description |
|---|---|
| Total Hours Variance (P13560X\|W13560XH) | Use this chart to view the hours variance for your equipment.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Equipment<br>• Product Family |
| Total Cost Variance (P13560X\|W13560XL) | Use this chart to view the cost variance for your equipment work orders.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Equipment |
| Average PM Fulfillment by Service Type (P13570X\|W13570XC) | Use this chart to view average preventative maintenance fulfillment data by service type.<br>This chart is based on the One View PM Analysis program (P13570, ZJDE0002).<br>Additionally, you can use the Begin Date and End Date fields to adjust the date range for the chart. |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Work Order Analysis (P13560)*
- *One View PM Analysis (P13570)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the My Maint Schedule page:

| Task | Description |
|---|---|
| PM Backlog | Use this task to access the Preventative Maintenance Backlog program (P12071, version ZJDE0001). When you click this task, the system takes you to the PM Backlog form. |
| Equipment Work Orders | Use this task to access the Work With Equipment Work Orders program (P13220, version ZJDE0001). When you click this task, the system takes you to the Work With Equipment Work Orders form. The following form layout is available:<br>• Work Order Details<br>The following grid format is available:<br>• Simple |
| Supply/Demand | Use this task to access the Supply and Demand Inquiry program (P4021, version ZJDE0001). When you click this task, the system takes you to the Supply/Demand - Work With Supply and Demand form. |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |

For additional information about the programs accessed by these tasks, see:

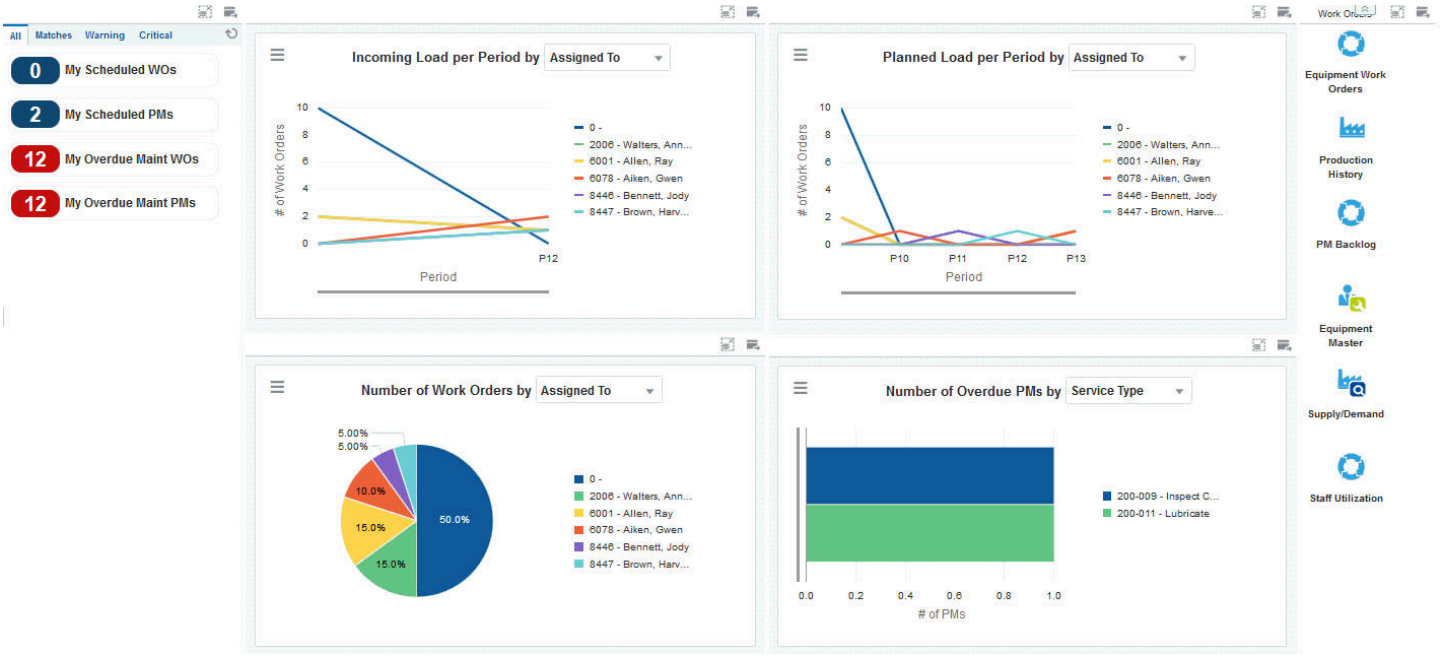
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *One View PM Analysis (P13570)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Processing Work Orders* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Analyzing Supply and Demand* in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# UX One: My Maint Work Order Load Page

The My Maint Work Order Load page (P13001X|W13001XD) enables maintenance supervisors to easily view information about upcoming and planned work order load for their team, and also to view overdue preventative maintenance records and work orders.

To access the UX One My Maint Work Order Load page, log in to the EnterpriseOne system using the Maintenance Supervisor role. When you log in with this role, the system automatically displays the Maintenance Supervisor page. Click the My Maint Work Order Load task on the springboard to access the My Maint Work Order Load page.

This graphic illustrates the My Maint Work Order Load page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the My Maint Work Order Load page:

| Watchlist Alert | Description |
|---|---|
| My Scheduled WOs | This alert tells users how many work orders are currently scheduled.<br><br>This alert is based on the Planning Workbench program (P13700). |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the Search for Equipment Work Orders form. |
| My Scheduled PMs | This alert tells users how many preventative maintenance records are currently scheduled.<br>This alert is based on the Preventive Maintenance Backlog program (P12071).<br>When you click the alert, the system displays the PM Backlog form. |
| My Overdue Maint WOs | This alert tells users how many work orders are currently overdue.<br>This alert is based on the Planning Workbench program (P13700).<br>When you click the alert, the system displays the Search for Equipment Work Orders form. |
| My Overdue Maint PMs | This alert tells users how many preventative maintenance records are currently overdue.<br>This alert is based on the Preventive Maintenance Backlog program (P12071).<br>When you click the alert, the system displays the PM Backlog form. |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*:

- *Working with Preventive Maintenance Schedules*
- *Working With Orders*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the My Maint Work Order Load page:

| Component Title | Description |
|---|---|
| Incoming Load Per Period (P13560X\|W13560XC) | Use this chart to view the incoming work order load for the period.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |
| Planned Load Per Period(P13560X\|W13560XD) | Use this chart to view the planned work order load for the period.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560). |

| Component Title | Description |
|---|---|
| | Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |
| Number of Work Orders (P13560X\| W13560XJ) | Use this chart to view the current number of work orders.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Equipment<br>• Supervisor<br>• WO Type |
| Number of Overdue PMs (P13570X\| W13570XA) | Use this chart to view the current number of overdue PM records.<br>This chart is based on the One View PM Analysis Inquiry program (P13570).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Service Type |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*.

- *One View Work Order Analysis (P13560)*
- *One View PM Analysis (P13570)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the My Maint Work Order Load page:

| Task | Description |
|---|---|
| Equipment Work Orders | Use this task to access the Work With Equipment Work Orders program (P13220, version ZJDE0001). When you click this task, the system takes you to the Work With Equipment Work Orders form. The following form layout is available:<br>• Work Order Details<br>The following grid format is available:<br>• Simple |

| Task | Description |
|---|---|
| Production History | Use this task to access the Production History program (P31227, version ZJDE0002). When you click this task, the system takes you to the Work With Production History form. The following grid format is available:<br>• Basic |
| PM Backlog | Use this task to access the Preventative Maintenance Backlog program (P12071, version ZJDE0001). When you click this task, the system takes you to the PM Backlog form. |
| Equipment Master | Use this task to access the Equipment Master program (P1701, version ZJDE0002). When you click this task, the system takes you to the Equipment Master - Work with Equipment Master form. The following form layout is available:<br>• Equipment Status History<br>The following grid format is available:<br>• Simple |
| Supply/Demand | Use this task to access the Supply and Demand Inquiry program (P4021, version ZJDE0001). When you click this task, the system takes you to the Supply/Demand - Work With Supply and Demand form. |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |

For additional information about the programs accessed by these tasks, see:

- *Processing Work Orders* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Managing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*
- *Creating Equipment Master Records* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Analyzing Supply and Demand* in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# 22 Capital Asset Management Roles: Maintenance Technician (Release 9.2 Update)

## Understanding the Maintenance Technician UX One Role

The Maintenance Technician role, and the associated UX One page and components, enable users to receive alerts, analyze data, and access related programs to enable them to take action, if required.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Maintenance Technician (MNTTCHJDE) role, and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the MNTTCHJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Maintenance Technician role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Capital Asset Management*.

## Using the Maintenance Technician UX One Role

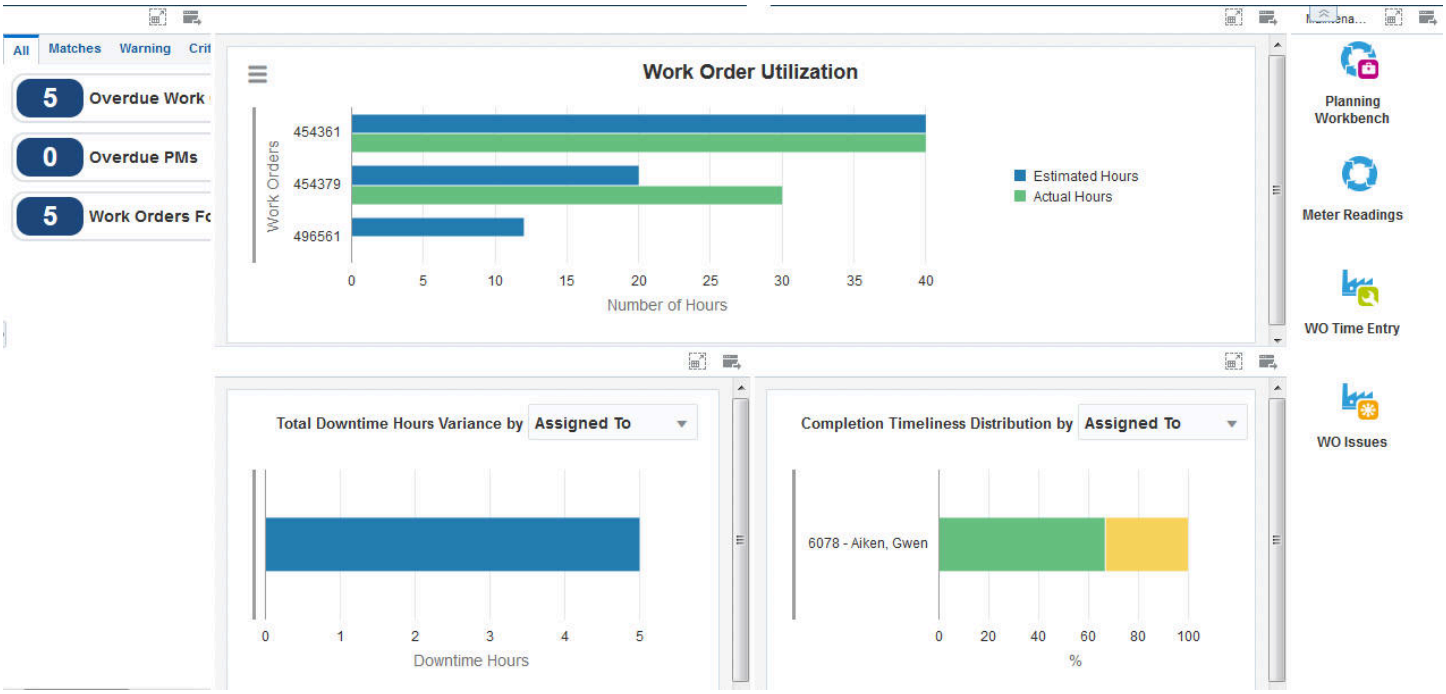
You use the Maintenance Technician role to access the UX One Maintenance Technician page (P13006X|W13006XA).

# UX One: Maintenance Technician Page

The Maintenance Technician page (P13006X|W13006XA) enables you to receive alerts about your overdue work orders for the current week, overdue work orders, and preventive maintenance, and analyze data about work orders assigned to you. You can also access related programs so that you can take any required action.

To access the UX One Maintenance Technician page, log in to the EnterpriseOne system using the Maintenance Technician role.

This graphic illustrates the Maintenance Technician page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs and business views. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a

different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Technician page:

| Watchlist Alert | Description |
|---|---|
| Overdue Work Orders | This alert displays the number of overdue work orders that are assigned to you.<br><br>This alert is based on the Planning Workbench program (P13700, version ZJDE0001). When you click this alert, the system displays the Search for Equipment Work Orders form.<br><br>The following grid format is available:<br><br>• Basic<br>The following personal form is available:<br><br>• Planning Workbench |
| Overdue PMs | This alert displays the number of overdue preventive maintenance that is assigned to you.<br><br>This alert is based on the Preventive Maintenance Backlog program (P12071). When you click this alert, the system displays the PM Backlog form. |
| Work Orders for this Week | This alert displays the number of work orders assigned to you that are due for completion in the current week.<br><br>This alert is based on the Planning Workbench program (P13700, version ZJDE0001). When you click this alert, the system displays the Search for Equipment Work Orders form.<br><br>The following grid format is available:<br><br>• Basic<br>The following personal form is available:<br><br>• Planning Workbench |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* :

- *Creating Work Orders Using the Planning Workbench Program (P13700)*
- *Changing the Status of PMs to Complete*

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

> **Note:** You must create specific queries for each maintenance technician to ensure that the charts display information specific to the maintenance technician.

This table lists and describes the charts that are available on the Maintenance Technician page:

| Component Title | Description |
|---|---|
| Work Order Utilization (P48201X\|W48201XA) | Use this chart to review the work order utilization for the current week. The chart displays work order utilization data only for the user who is currently logged in. You can use this chart to compare the actual hours with the estimated hours for each work order assigned to you.<br><br>This chart is based on the Work With Work Orders program (P48201). |
| Total Downtime Hours Variance (P13560X\|W13560XI) | Use this chart to view the total downtime hours variance based on the assignee, equipment, product family, or product model.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Equipment<br>• Product Family<br>• Product Model |
| Completion Timeliness Distribution (P13560X\|W13560XA) | Use this chart to view completion timeliness statistics for work orders.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Lead Craft<br>• Product Family<br>• Supervisor |

For additional information about the programs associated with these charts, see these topics:

- *Creating Work Orders Using the Work Order Entry Programs (P48201 and P17714)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maintenance Technician page:

| Task | Description |
|---|---|
| Planning Workbench | Use this task to access the Planning Workbench program (P13700).<br><br>The following grid format is available:<br><br>• Basic |

| Task | Description |
|---|---|
| | The following personal form is available:<br>• Planning Workbench |
| Meter Readings | Use this task to access the Speed Meter Readings program (P12120U). |
| WO Time Entry | Use this task to access the Hours and Quantities program (P311221). |
| WO Issues | Use this task to access the Work Order Inventory Issues program (P31113). |

For additional information about the programs accessed by these tasks, see:

- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Entering Speed Meter Readings* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Issuing Material Manually* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*
- *Entering Hours and Quantities* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*

# 23 Capital Asset Management Roles: Operations Manager

## Understanding the Operations Manager UX One Role

The Operations Manager role, and the associated UX One pages and components, enable users to receive alerts about overdue preventive maintenance and safety incidents that are currently active within the maintenance team. The pages provide analytical data about the safety, cost performance, reliability, and work load for the maintenance team. Additionally, the pages provide easy access to the pages and programs the operations manager needs to act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Operations Manager role (OPMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the OPMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Operations Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Capital Asset Management.*

# Using the Operations Manager UX One Role

You use the Operations Manager role to access these UX One pages:

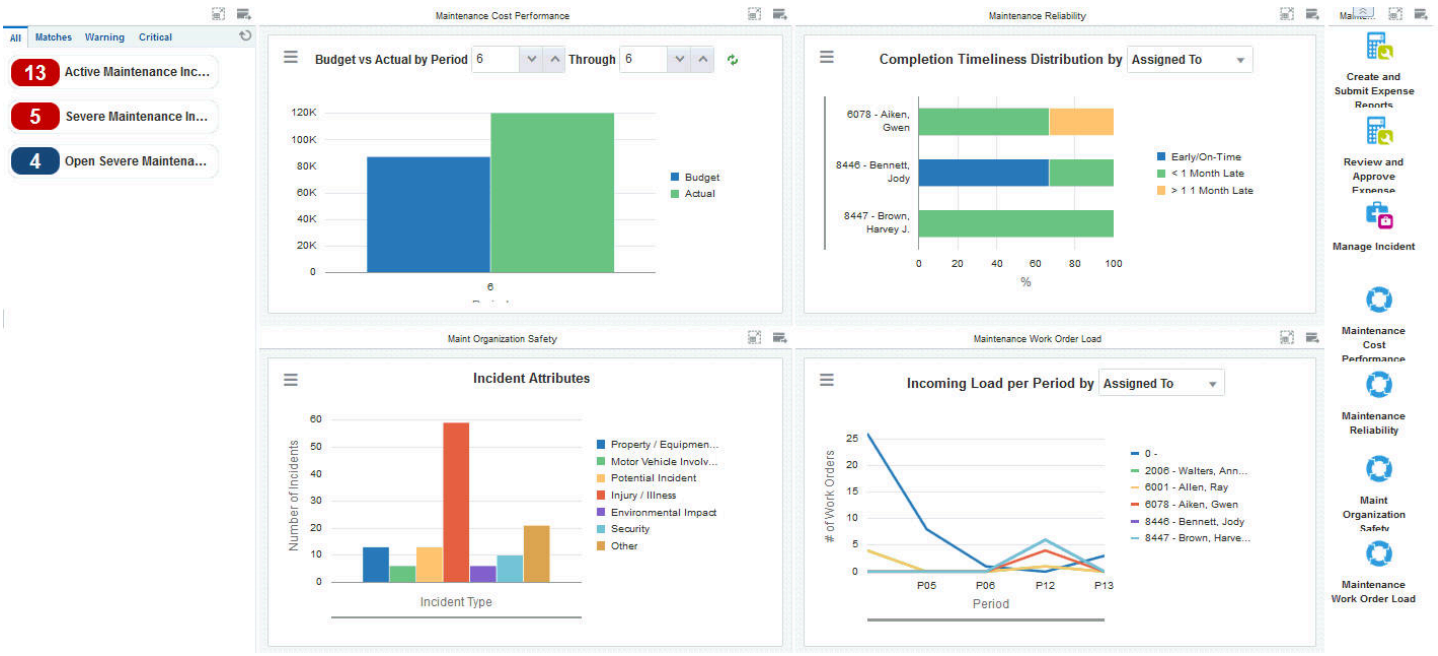
- Maintenance Operations Manager (P13003X|W13003XA)
- Maintenance Work Order Load (P13003X|W13003XB)
- Maintenance Reliability (P13003X|W13003XC)
- Maint Organization Safety (P13003X|W13003XD)
- Maintenance Cost Performance (P13003X|W13003XE)

## UX One: Maintenance Operations Manager Page

The Maintenance Operations Manager page (P13003X|W13003XA) enables users to receive alerts about safety incidents and overdue preventive maintenance records that need attention. The page also provides high-level analytical data about completion timeliness, cost, safety incidents, and work load. Additionally, the page provides easy access to frequently used programs and pages that provide additional data.

To access the UX One Maintenance Operations Manager page, log in to the EnterpriseOne system using the Maintenance Operations Manager role.

This graphic illustrates the Maintenance Operations Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Operations Manager page:

| Watchlist Alert | Description |
|---|---|
| Active Maintenance Incidents | This alert tells users how many active maintenance incidents their team currently has.<br><br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br><br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br><br>• Review Incidents<br>The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Severe Maintenance Incidents | This alert tells users how many severe maintenance incidents their team currently has.<br><br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br><br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br><br>• Review Incidents<br>The following grid format is available:<br><br>• Simple |
| Open Severe Maintenance Alerts | This alert tells users how many open severe maintenance alerts their team currently has.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310).<br><br>When you click the alert, the system displays the Work With Condition-Based Alerts form.<br><br>The following grid format is available:<br><br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *One View Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Operations Manager page:

| Component Title | Description |
|---|---|
| Budget vs Actual by Period (P09217X\|W09217XB) | Use this chart to view budget amounts versus actual amounts by period for your team.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217, version ZJDE0002 or ZJDE0003). You can use the fields at the top of the chart to specify which periods to include in the chart. |
| Completion Timeliness Distribution (P13560X\|W13560XA) | Use this chart to view work order completion statistics for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options: |

| Component Title | Description |
|---|---|
| | • Assigned To<br>• Lead Craft<br>• Product Family<br>• Supervisor |
| Incident Attributes (P54HS22X\| W54HS22XA) | Use this chart to view the total number of incidents for your team.<br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Incoming Load Per Period (P13560X\| W13560XC) | Use this chart to view the incoming work order load for the period.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Supervisor (default)<br>• Assigned To |

For additional information about the programs associated with these charts, see:

- *One View Account Balance Inquiry (P09217)*
- *One View Work Order Analysis (P13560)*
- *One View Incident Summary Inquiry (P54HS220)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Maintenance Operations Manager page:

| Task | Description |
|---|---|
| Create and Submit Expense Reports | Use this task to access the Expense Entry program (P09E2011, version ZJDE0002). |
| Review and Approve Expense Reports | Use this task to access the Expense Entry program (P09E2011, version ZJDE0003). |
| Manage Incident | Use this task to access the Incident Master program (P54HS00). The following grid format is available:<br>• Simple |
| Maintenance Cost Performance | Use this task to access the Maintenance Cost Performance UX One page. |
| Maintenance Reliability | Use this task to access the Maintenance Reliability UX One page. |
| Maint Organization Safety | Use this task to access the Maint Organization Safety UX One page. |

| Task | Description |
| --- | --- |
| Maintenance Work Order Load | Use this task to access the Maintenance Work Order Load UX One page. |

For additional information about the programs accessed by these task, see:

- *Entering Expense Reports* and *Revising and Approving Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*
- *Entering and Managing Incidents* in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implemenation Guide*

# UX One: Maintenance Work Order Load Page

The Maintenance Work Order Load page (P13003X|W13003XB) enables users to receive alerts about overdue work orders and preventive maintenance records that need attention. The page also provides analytical data about the incoming and completed work load, and aging statistics for the maintenance team.

To access the UX One Maintenance Work Order Load page, log in to the EnterpriseOne system using the Maintenance Operations Manager role. When you log in with this role, the system automatically displays the Maintenance Operations Manager page. Click the Maintenance Work Order Load task on the springboard to access the Maintenance Work Order Load page.

This graphic illustrates the Maintenance Work Order Load page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Work Order Load page:

| Watchlist Alert | Description |
|---|---|
| Open Severe Maintenance Alerts | This alert tells users how many open severe maintenance alerts their team currently has.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310).<br><br>When you click the alert, the system displays the Work With Condition-Based Alerts form. The following grid format is available:<br><br>• Basic |

| Watchlist Alert | Description |
|---|---|
| Overdue Maintenance PMs | This alert tells users how many preventive maintenance records are currently overdue.<br><br>This alert is based on the Preventive Maintenance Backlog program (P12071).<br><br>When you click the alert, the system displays the PM Backlog form. |
| Overdue Maintenance WOs | This alert tells users how many work orders are currently overdue.<br><br>This alert is based on the Planning Workbench program (P13700).<br><br>When you click the alert, the system displays the One View Equipment Work Order Analysis Inquiry form. The following form layout is available:<br><br>• Equipment WOs<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Work Order Load page:

| Component Title | Description |
|---|---|
| Incoming Load Per Period (P13560X\|W13560XC) | Use this chart to view the incoming work order load for the period.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Supervisor |
| Completed Load Per Period (P13560X\|W13560XE) | Use this chart to view the completed work order load for the period.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560). |

| Component Title | Description |
|---|---|
| | Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |
| Age Distribution (P13560X\|W13560XB) | Use this chart to view work order aging information.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |

For additional information about the programs associated with these charts, see *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# UX One: Maintenance Reliability Page

The Maintenance Reliability page (P13003X|W13003XC) enables users to receive alerts regarding overdue work orders and preventive maintenance records that require attention. The page also provides analytical data about the reliability of the equipment used by the maintenance team.

To access the UX One Maintenance Reliability page, log in to the EnterpriseOne system using the Maintenance Operations Manager role. When you log in with this role, the system automatically displays the Maintenance Operations Manager page. Click the Maintenance Reliability task on the springboard to access the Maintenance Reliability page.

This graphic illustrates the Maintenance Reliability page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Reliability page:

| Watchlist Alert | Description |
|---|---|
| Overdue Maintenance PMs | This alert tells users how many preventive maintenance records are currently overdue.<br><br>This alert is based on the Preventive Maintenance Backlog program (P12071).<br><br>When you click the alert, the system displays the PM Backlog form. The following form layout is available:<br><br>• Equipment WOs<br>The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Overdue Maintenance WOs | This alert tells users how many work orders are currently overdue.<br>This alert is based on the Planning Workbench program (P13700).<br>When you click the alert, the system displays the Search for Equipment Work Orders form. |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide* .
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* .
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Reliability page:

| Component Title | Description |
|---|---|
| Alert Level by Equipment (P1310X\|W1310XA) | Use this chart to view the alert level for each piece of equipment.<br>This chart is based on the Condition-Based Alerts Workbench program (P1310). |
| Average PM Fulfillment by Service Type (P13570X\|W13570XC) | Use this chart to view average preventative maintenance fulfillment data by service type.<br>This chart is based on the One View PM Analysis program (P13570).<br>Additionally, you can use the Begin Date and End Date fields to adjust the date range for the chart. |
| Average Days At and Not At Status (P13400X\|W13400XA) | Use this chart to view the number of days that equipment items have been at or not at a specified status.<br>This chart is based on the One View Equipment Status Inquiry program (P13400).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Equipment<br>• Manufacturer<br>• Product Family |

| Component Title | Description |
| --- | --- |
| Number of Overdue PMs (P13570X\|W13570XA) | Use this chart to view the number of overdue preventative maintenance there currently are.<br>This chart is based on the One View PM Analysis program (P13570).<br>You can select one of these options:<br>• Assigned To<br>• Service Type |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View PM Analysis (P13570)*
- *One View Equipment Status Inquiry (P13400)*
- *One View PM Analysis (P13570)*

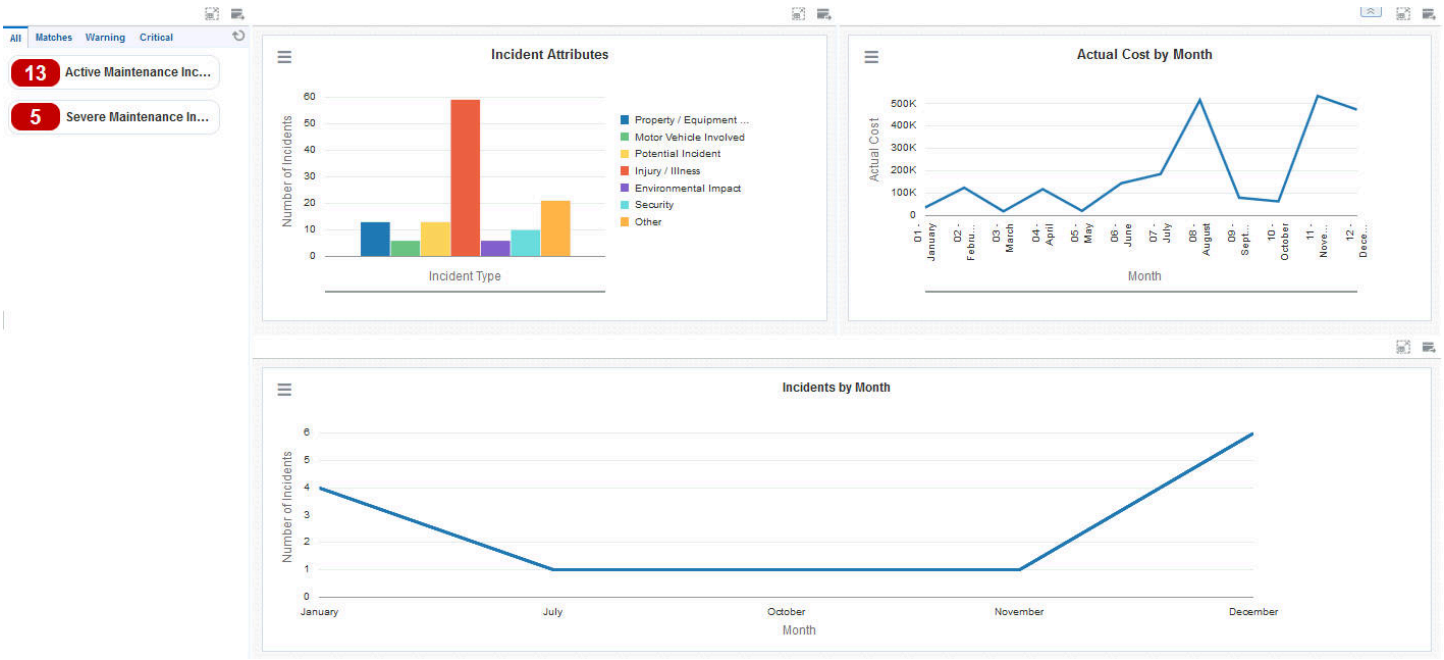
Additionally, see *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide* .

# UX One: Maint Organization Safety Page

The Maint Organization Safety page (P13003X|W13003XD) enables users to receive alerts about active and severe safety incidents associated with their team. The page also provides analytical data about the type, cost, and number of incidents associated with the team.

To access the UX One Maint Organization Safety page, log in to the EnterpriseOne system using the Maintenance Operations Manager role. When you log in with this role, the system automatically displays the Maintenance Operations Manager page. Click the Maint Organization Safety task on the springboard to access the Maint Organization Safety page.

This graphic illustrates the Maint Organization Safety page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maint Organization Safety page:

| Watchlist Alert | Description |
|---|---|
| Active Maintenance Incidents | This alert tells users how many active maintenance incidents their team currently has.<br><br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br><br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br><br>• Review Incidents<br>The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Severe Maintenance Incidents | This alert tells users how many severe maintenance incidents their team currently has.<br><br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br><br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br><br>• Review Incidents<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see: *One View Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maint Organization Safety page:

| Component Title | Description |
|---|---|
| Incident Attributes (P54HS22X\|W54HS22XD) | Use this chart to view the total number of incidents for your team.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Actual Cost by Month (P54HS22X\|W54HS22XB) | Use this chart to view the cost by month of the incidents for your team.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Incidents by Month (P54HS22X\|W54HS22XA) | Use this chart to view the number of incidents for your team by month.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |

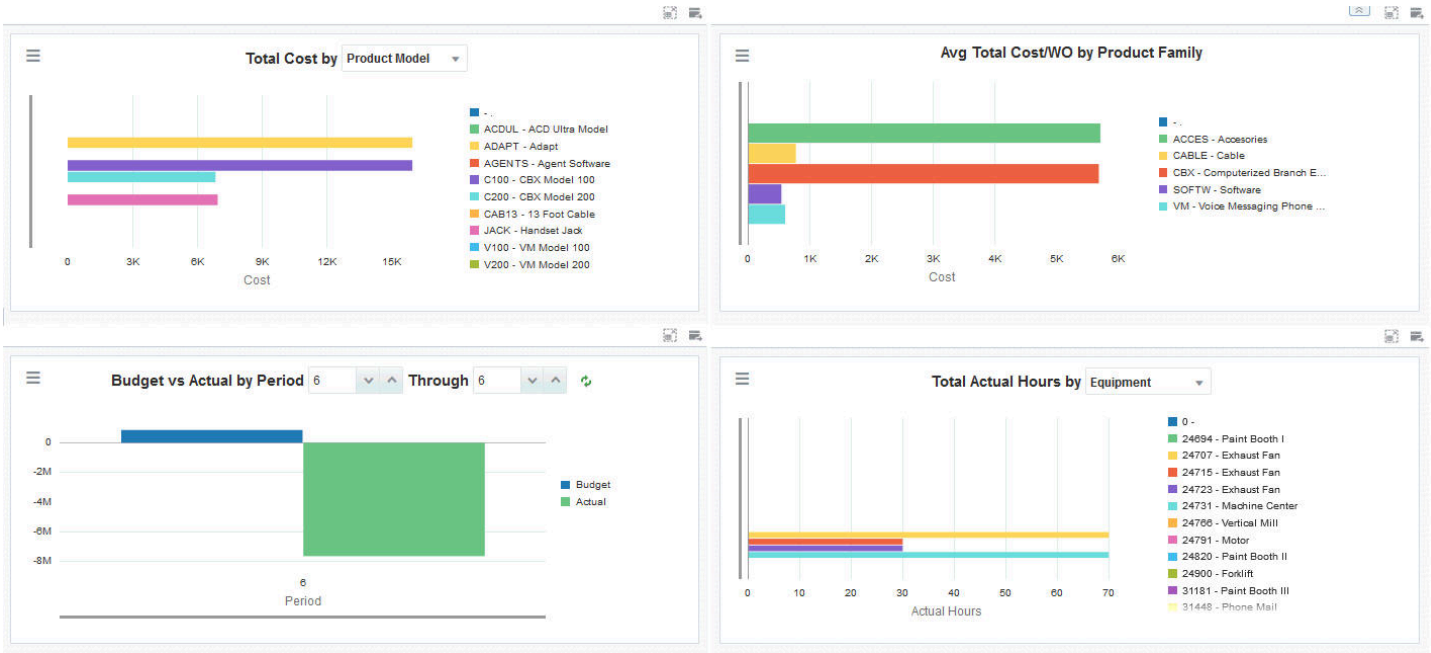
For additional information about the programs associated with these charts, see *One View Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# UX One: Maintenance Cost Performance Page

The Maintenance Cost Performance page (P13003X|W13003XE) enables users to review analytical data about the cost associated with the equipment and work orders for your maintenance team.

To access the UX One Maintenance Cost Performance page, log in to the EnterpriseOne system using the Maintenance Operations Manager role. When you log in with this role, the system automatically displays the Maintenance Operations Manager page. Click the Maintenance Cost Performance task on the springboard to access the Maintenance Cost Performance page.

This graphic illustrates the Maintenance Cost Performance page:




## Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Cost Performance page:

| Component Title | Description |
|---|---|
| Total Cost (P13560X\|W13560XG) | Use this chart to view total costs for work orders.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560). |

| Component Title | Description |
|---|---|
| | Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Product Family<br>• Product Model |
| Average Total Cost/WO by Product Family (P13560X\|W13560XN) | Use this chart to view the average total cost per work order by product family.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560). |
| Budget vs Actual by Period (P09217X\|W09217XD) | Use this chart to view budgeted and actual amounts for a range of periods.<br>This chart is based on the One View Account Balance Inquiry program (P09217).<br>Additionally, you can use the fields at the top of the chart to specify your period range. |
| Total Actual Hours (P13560X\|W13560XR) | Use this chart to view the actual number of hours for your equipment.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560). You can select One of these options:<br>• Equipment<br>• Product Family |

For additional information about the programs associated with these charts, see these topics in *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Work Order Analysis (P13560)*
- *One View Account Balance Inquiry (P09217)*

# 24 Fulfillment Management Roles: Fulfillment Manager

## Understanding the Fulfillment Manager UX One Role

The Fulfillment Manager role, and the associated UX One pages and components, enable users to:

- Receive alerts regarding order lines in fulfillment, service level rules, and unfulfilled lines.
- Analyze unfulfilled items based on open orders, order score, promised delivery dates, and past dues.
- Easily access various fulfillment management programs.

The Fulfillment Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Fulfillment Manager role (FULMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the FULMGRJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Fulfillment Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Fulfillment Management.*

# Using the Fulfillment Manager UX One Role

You use the Fulfillment Manager role to access these UX One pages:

- Fulfillment Manager (P42W001X|W42W001XA)
- Fulfillment Manager - SLR (P42W001X|W42W001XB)

## UX One: Fulfillment Manager Page

The Fulfillment Manager page (P42W001X|W42W001XA) enables users to:

- Receive alerts regarding order lines in fulfillment and unfulfilled lines.
- Analyze unfulfilled items based on open orders, order score, promised delivery dates, and past dues.
- Act quickly by easily accessing the fulfillment management programs.

To access the UX One Fulfillment Manager page, log in to the EnterpriseOne system using the Fulfillment Manager role.

This graphic illustrates the Fulfillment Manager page:

All
Matches
Warning
Critical
95
Order Lines in Fulfillment
3
Unfulfilled Lines Due in Next 7 Days
10
Past Due Unfulfilled Lines
Unfulfilled, Available and Order Quantity by Item
Units (Quantity)
5K
4K
3K
2K
1K
0
#2 Pencil
3-Ring Binder
Class Supply Kit
College Rule Paper
Fine Point Pen
Wide Rule Paper
Item
Available
Unfulfilled
Order Quantity
Past Due Unfulfilled Quantity by Item
Units (Quantity)
1.8K
1.5K
1.2K
0.9K
0.6K
0.3K
0.0
Item
#2 Pencil
3-Ring Binder
Class Supply Kit
College Rule Paper
Fine Point Pen
Wide Rule Paper
Unfulfilled Quantity by Items and Order Score
Units (Unfulfilled Quantity)
3.5K
3.0K
2.5K
2.0K
1.5K
1.0K
0.5K
0.0
#2 Pencil
3-Ring Binder
Class Supply Kit
College Rule Paper
Fine Point Pen
Wide Rule Paper
Item
Above 100
51-100
0-50
Unfulfilled Quantity by Promised Delivery Date
Units (Quantity)
300
250
200
150
100
50
0
Promised Delivery Date
10/22/2016
10/23/2016
10/24/2016
10/25/2016
10/26/2016
10/27/2016
10/28/2016
Fulfillment Workbench
Auto Fulfillment
Release from Fulfillment
Order Scoring
Fulfillment Rule
Basic Score
Fulfillment Manager - SLR

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Fulfillment Manager page:

| Watchlist Alert | Description |
|---|---|
| Order Lines in Fulfillment | This alert tells users about the number of order lines that are in fulfillment.<br>This alert is based on the Fulfillment Workbench - Search program (P4277701, version ZJDE0002).<br>When you click the alert, the system displays the Fulfillment Workbench - Search form.<br>The following grid format is available:<br>• Basic |
| Unfulfilled Lines Due in Future | This alert tells users about the number of unfulfilled lines that are due in the next 7 days.<br>This alert is based on the Fulfillment Workbench - Search program (P4277701, version ZJDE0002).<br>When you click the alert, the system displays the Fulfillment Workbench - Search.<br>The following grid format is available:<br>• Basic |
| Past Due Unfulfilled Lines | This alert tells users about the number of unfulfilled lines that were due in the past 7 days.<br>This alert is based on the Fulfillment Workbench - Search program (P4277701, version ZJDE0002).<br>When you click the alert, the system displays the Fulfillment Workbench - Search.<br>The following grid format is available:<br>• Basic |

For additional information about the programs associated with these watchlist alerts, see *Setting Processing Options for the Fulfillment Workbench Program (P4277701)* in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Fulfillment Manager page:

| Component Title | Description |
|---|---|
| Unfulfilled, Available & Order Quantity by Item (P427770X\|W427770XA) | Use this chart to review different fulfillment quantities by item for orders that are in fulfillment.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701). |
| Unfulfilled Quantity by Items and Order Score (P427770X\|W427770XB) | Use this chart to review the unfulfilled quantity for scored fulfillment orders by item.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701). |
| Past Due Unfulfilled Quantity by Item (P427770X\|W427770XC) | Use this chart to review the unfulfilled quantity by item for orders whose requested date is past their due date.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701). |
| Unfulfilled Quantity by Promised Delivery Date (P427770X\|W427770XD) | Use this chart to review the unfulfilled quantity by promised delivery date.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701). |
| | |

For additional information about the programs associated with these charts, see *Setting Processing Options for the Fulfillment Workbench Program (P4277701)* in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Fulfillment Manager page:

| Task | Description |
|---|---|
| Fulfillment Workbench | Use this task to access the Fulfillment Workbench - Fulfillment Workbench - Search program (P4277701, version ZJDE0003).<br><br>The following grid format is available:<br><br>• Basic |
| Auto Fulfillment | Use this task to access the Auto Fulfillment for Fulfillment Management program (R4277701, version XJDE0001). |
| Release From Fulfillment | Use this task to access the Release from Fulfillment program (R4277703, version XJDE0001). |
| Order Scoring | Use this task to access the Fulfillment Batch Scoring Process program (R4277702, version XJDE0001). |
| Fulfillment Rule | Use this task to access the Fulfillment Rules - Fulfillment Rules - Search for Rules program (P4277720). |
| Basic Score | Use this task to access the Basic Score - Basic Scoring Setup program (P4277750). |

| Task | Description |
| --- | --- |
| Fulfillment Manager - SLR | Use this task to access the Fulfillment Manager - SLR page (P42W001X\|W42W001XB). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide*:

- *Setting Processing Options for the Fulfillment Workbench Program (P4277701)*
- *Running the Auto Fulfillment Processing Report (R4277701)*
- *Running the Sales Order Score Batch Processing Report (R4277702)*
- *Running the Release from Fulfillment report (R4277703)*

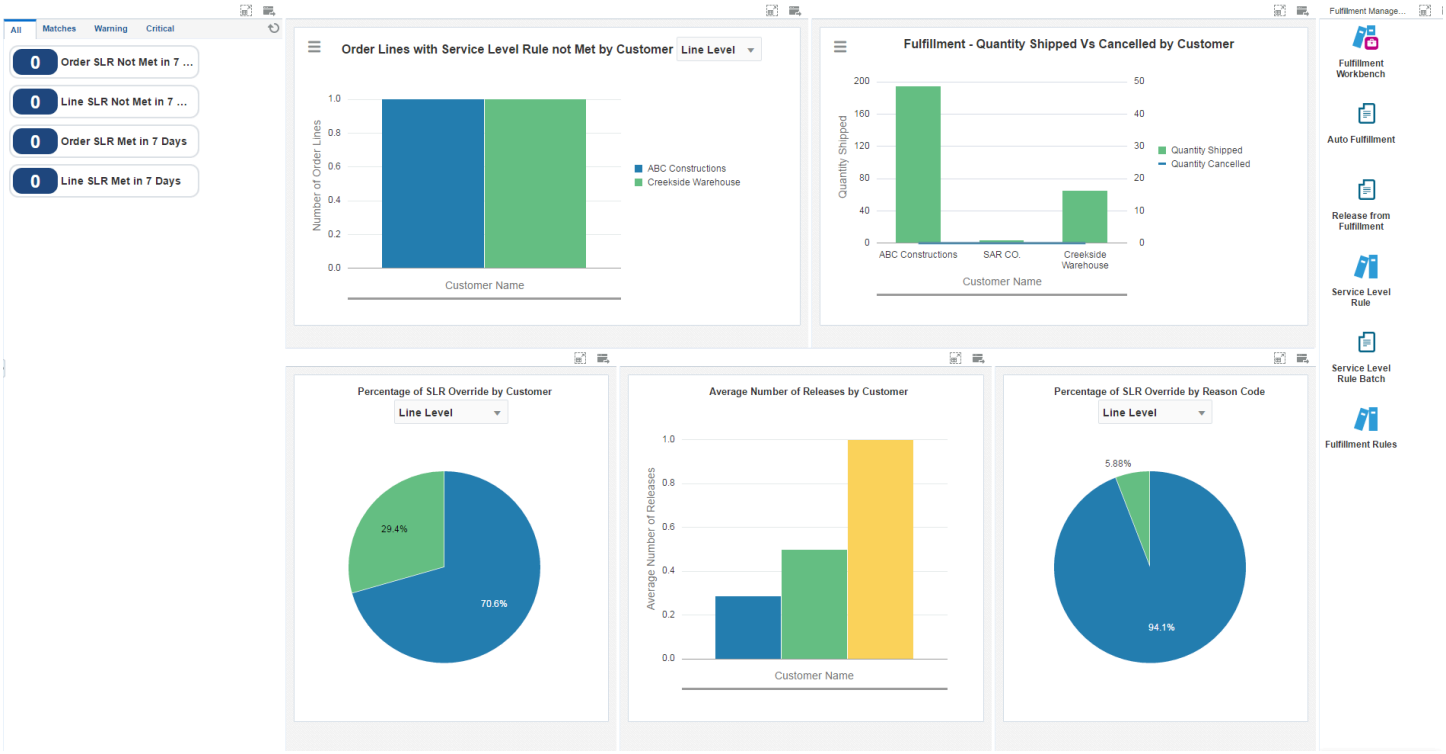
# UX One: Fulfillment Manager - SLR Page

The Fulfillment Manager - SLR page (P42W001X|W42W001XB) enables users to:

- Receive alerts regarding order lines and orders that have met service level rules.
- Analyze order lines that do not meet service level rules, SLR overrides, releases by customer, and shipments in fulfillment.
- Act quickly by easily accessing the fulfillment management programs.

To access the UX One Fulfillment Manager - SLR page, log in to the EnterpriseOne system using the Fulfillment Manager role. When you log in with this role, the system automatically displays the Fulfillment Manager page. Click the Fulfillment Manager - SLR task on the springboard to access the Fulfillment Manager - SLR page.

This graphic illustrates the Fulfillment Manager - SLR page:


All
Matches
Warning
Critical
0
Order SLR Not Met in 7 ...
0
Line SLR Not Met in 7 ...
0
Order SLR Met in 7 Days
0
Line SLR Met in 7 Days
Order Lines with Service Level Rule not Met by Customer
Line Level
Number of Order Lines
1.0
0.8
0.6
0.4
0.2
0.0
Customer Name
ABC Constructions
Creekside Warehouse
Fulfillment - Quantity Shipped Vs Cancelled by Customer
Quantity Shipped
200
160
120
80
40
0
50
40
30
20
10
0
ABC Constructions
SAR CO.
Creekside Warehouse
Customer Name
Quantity Shipped
Quantity Cancelled
Fulfillment Manage...
Fulfillment Workbench
Auto Fulfillment
Release from Fulfillment
Service Level Rule
Service Level Rule Batch
Fulfillment Rules
Percentage of SLR Override by Customer
Line Level
29.4%
70.6%
Average Number of Releases by Customer
Average Number of Releases
1.0
0.8
0.6
0.4
0.2
0.0
Customer Name
Percentage of SLR Override by Reason Code
Line Level
5.88%
94.1%

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Fulfillment Manager - SLR page:

| Watchlist Alert | Description |
|---|---|
| Order SLR Not Archived | This alert tells users about the number of order service level rules that were not met in the last 7 days.<br>This alert is based on the Fulfillment Workbench - Search program (P4277701, version ZJDE0004).<br>When you click the alert, the system displays the Fulfillment Workbench - Search form.<br>The following grid format is available:<br>• Basic |
| Line SLR Not Archived | This alert tells users about the number of line service level rules that were not met in the last 7 days.<br>This alert is based on the Fulfillment Workbench - Search program (P4277701, version ZJDE0004).<br>When you click the alert, the system displays the Fulfillment Workbench - Search form.<br>The following grid format is available:<br>• Basic |
| Order SLR Archived | This alert tells users about the number of order service level rules that were met in the last 7 days.<br>This alert is based on the Fulfillment Workbench - Search program (P4277701, version ZJDE0004).<br>When you click the alert, the system displays the Fulfillment Workbench - Search form.<br>The following grid format is available:<br>• Basic |
| Line SLR Archived | This alert tells users about the number of line service level rules that were met in the last 7 days.<br>This alert is based on the Fulfillment Workbench - Search program (P4277701, version ZJDE0004).<br>When you click the alert, the system displays the Fulfillment Workbench - Search form.<br>The following grid format is available:<br>• Basic |

For additional information about the programs associated with these watchlist alerts, see *Setting Processing Options for the Fulfillment Workbench Program (P4277701)* in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Fulfillment Manager - SLR page:

| Component Title | Description |
|---|---|
| Order Lines with Service Level Rule not met by Customer (P427770X\|W427770XE) | Use this chart to review the number of orders lines whose service level rules were not met, by customer.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select this option:<br><br>• Order Level<br><br>Use this chart to review the number of order line whose order service level rules were not met, by customer.<br>• Line Level<br><br>Use this chart to review the number of order lines whose service level rules were not met, by customer. |
| Fulfillment Quantity Shipped vs. Cancelled by Customer (P427770X\|W427770XH) | Use this chart to review the quantity shipped against the quantity cancelled during fulfillment, by customer.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701). |
| Percentage of SLR Override by Customer (P427770X\|W427770XF) | Use this chart to review the percentage of service level rules that were overridden, by customer, for order lines.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select this option:<br><br>• Order Level<br><br>Use this chart to review the percentage of order service level rules that were overridden, by customer, for orders.<br>• Line Level<br><br>Use this chart to review the percentage of order service level rules that were overridden, by customer, for line orders. |
| Average Number of Releases by Customer (P427770X\|W427770XI) | Use this chart to review the average number of releases, by customer.<br><br>The system uses this formula to calculate the average number o releases:<br><br>Average count for each customer = Total Count/Total Orders<br><br>The Total Count and Total Orders are calculated for order by customer for which the fulfillment status is 'Released'.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701). |

| Component Title | Description |
|---|---|
| | |
| Percentage of SLR Overridden by Reason Code (P427770X\|W427770XG) | Use this chart to review the percentage of service level rules that were overridden, by reason code.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select this option:<br><br>• Order Level<br><br>Use this chart to review the percentage of service level rules overridden by reason code or orders.<br><br>• Line Level<br><br>Use this chart to review the percentage of service level rules overridden by reason code or order lines. |

For additional information about the programs associated with these charts, see *Setting Processing Options for the Fulfillment Workbench Program (P4277701)* in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Fulfillment Manager - SLR page:

| Task | Description |
|---|---|
| Fulfillment Workbench | Use this task to access the Fulfillment Workbench - Fulfillment Workbench - Search program (P4277701, version ZJDE0005). |
| Auto Fulfillment | Use this task to access the Auto Fulfillment for Fulfillment Management program (R4277701, version XJDE0001). |
| Release From Fulfillment | Use this task to access the Release from Fulfillment program (R4277703, version XJDE0001). |
| Service Level Rule | Use this task to access the Service Level Rule - Service Level Rule Maintenance program (P4277760). |
| Service Level Rule Batch | Use this task to access the Service Level Rules Update program (R4277705, version XJDE0001). |
| Fulfillment Rule | Use this task to access the Fulfillment Rules - Fulfillment Rules - Search for Rules program (P4277720). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide*:

- *Setting Processing Options for the Fulfillment Workbench Program (P4277701)*
- *Running the Auto Fulfillment Processing Report (R4277701)*

- *Running the Release from Fulfillment report (R4277703)*
- *Entering Orders into Fulfillment Processing*
- *Running Service Level Rules Update (R4277705)*

# 25 Fulfillment Management Roles: Additional UX One Components for Fulfillment Management

## Additional UX One Components for Fulfillment Management

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own UX One page or customizing existing pages.

**Charts**

These charts are based on EnterpriseOne programs and business views. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries may be associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available for Fulfillment Manager:

| Component Title | Description |
|---|---|
| Number of Shipments in Fulfillment (P427770X\|W427770XJ) | Use this chart to review the number of shipments that are in fulfillment due in the next X days by customer.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701). |
| Unfulfilled Quantity by Item (P427770X\|W427770XK) | Use this chart to review the unfulfilled quantity for different items, in the next 7 days.<br><br>This chart is based on the Fulfillment Workbench - Search program (P4277701). |

For additional information about the programs associated with these components, see *Setting Processing Options for the Fulfillment Workbench Program (P4277701)* in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide* .

# 26 General Accounting Roles: General Accounting Manager (Release 9.2 Update)

## Understanding the General Accounting Manager UX One Role

The General Accounting Manager role, and the associated UX One pages and components, enable users to receive alerts, analyze General Ledger (G/L) data, and access programs that enable them to perform their job duties.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the General Accounting Manager (GAMGRJDE) role and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the GAMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the General Accounting Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne General Accounting*.

## Using the General Accounting Manager UX One Role

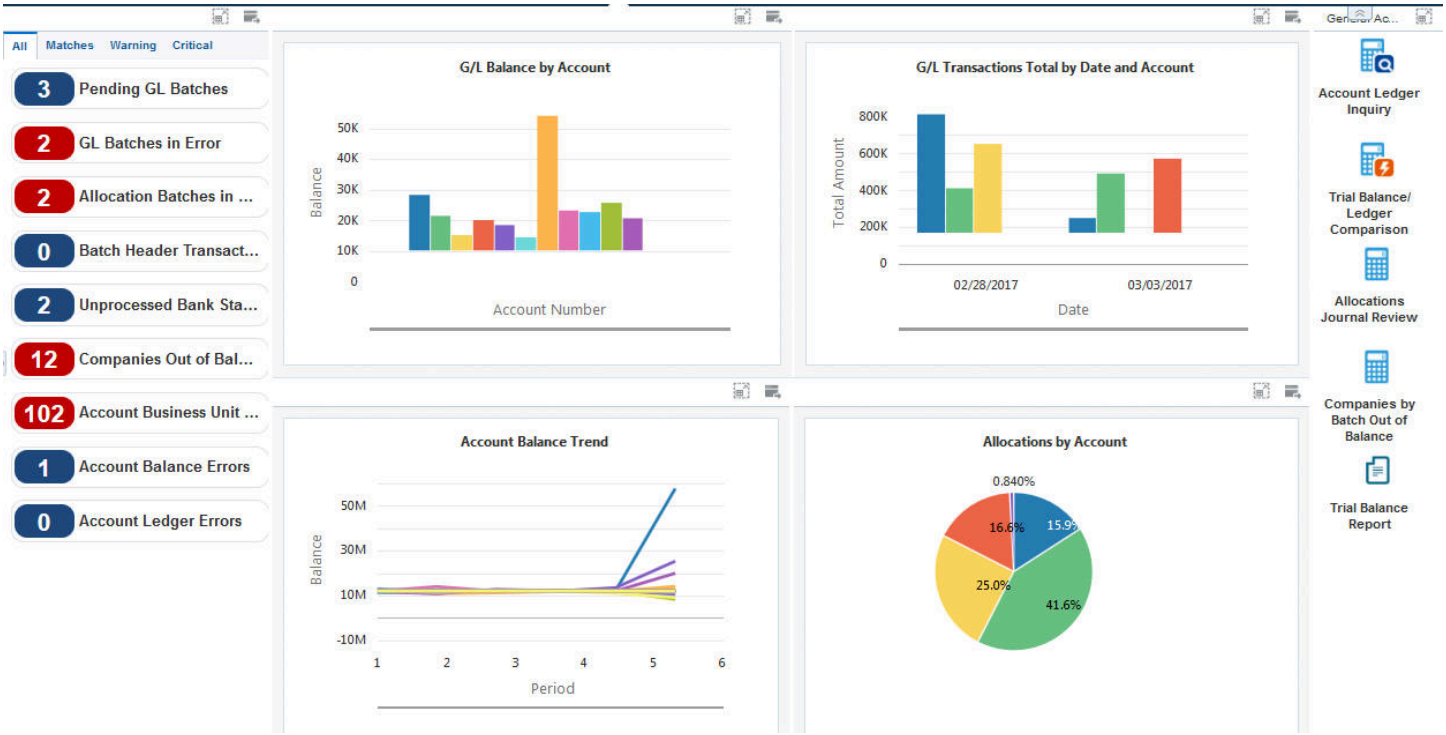
You use the General Accounting Manager role to access the General Accounting Manager page (P09001X|W09001XA).

# UX One: General Accounting Manager Page

The General Accounting Manager page (P09001X|W09001XA) enables users to view alerts for G/L batches and transactions, analyze G/L data, and access related programs to act on the information that you see.

To access the UX One General Accounting Manager page, log in to the EnterpriseOne system using the General Accounting Manager role.

This graphic illustrates the General Accounting Manager page:




**Watchlist Alerts**

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the General Accounting Manager page:

| Watchlist Alert | Description |
|---|---|
| Pending GL Batches | This alert displays the number of batches that are pending approval.<br><br>This alert is based on the Batches program (P0011, version ZJDE0025). When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• General Journal Review<br>The following grid format is available:<br><br>• Simple |
| GL Batches in Error | This alert displays the number of batches that have an error.<br><br>This alert is based on the Batches program (P0011). When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• General Journal Review<br>The following grid format is available:<br><br>• Simple |
| GL Batches Out of Balance | This alert displays the number of batches that are out of balance or batches for which the net amount is not equal to zero.<br><br>This alert is based on the Batches Out of Balance program (P007032). When you click the alert, the system displays the Batches Out of Balance form. The following form layout is available:<br><br>• Batches Out of Bal Review<br>The following grid format is available:<br><br>• Simple |
| Allocation Batches in Error | This alert displays the number of allocation batches that have an error.<br><br>This alert is based on the Batches program (P0011). When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• General Journal Review<br>The following grid format is available:<br><br>• Simple |
| Batch Header Transaction Error | This alert displays the number of batch header records that have errors in transaction tables.<br><br>This alert is based on the Transactions to Batch Headers program (P0072131). When you click the alert, the system displays the Transactions to Batch Headers form. The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Unprocessed Bank Statements | This alert displays the number of unprocessed bank statements.<br><br>This alert is based on the Unprocessed Bank Statements Inquiry program (P09632). When you click the alert, the system displays the Unprocessed Bank Statements Inquiry form. |
| Companies Out of Balance | This alert displays the number of companies that are out of balance.<br><br>This alert is based on the Companies Out of Balance program (P097001). When you click the alert, the system displays the Companies Out of Balance form. The following grid format is available:<br><br>• Simple |
| Account Business Unit Errors | This alert displays the number of Account Master (F0901) records that have errors because of discrepancies between the accounts and business units.<br><br>This alert is based on the Accounts to Business Units program (P097041). When you click the alert, the system displays the Accounts to Business Units form. The following form layout is available:<br><br>• Business Unit Review<br>The following grid format is available:<br><br>• Simple |
| Account Balance Errors | This alert displays the number of Account Master (F0901) records that have Account Master to Account Balance errors.<br><br>This alert is based on the Account Balance to Account Master program (P097031). When you click the alert, the system displays the Account Balance to Account Master form. The following form layout is available:<br><br>• General Accounting Manager<br>The following grid format is available:<br><br>• Simple |
| Account Ledger Errors | This alert displays the number of Account Master (F0901) records that have Account Ledger to Account Master errors.<br><br>This alert is based on the Account Ledger to Account Master program (P097021). When you click the alert, the system displays the Account Ledger to Account Master form.<br><br>The following form layout is available:<br><br>• General Accounting Manager<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* :

- *Reviewing Journal Entries*
- *Working with the Batches Out of Balance Program*

- *Working with the Transactions to Batch Headers Program*
- *Working with the Companies Out of Balance Program*
- *Working with the Accounts to Business Units Program*
- *Working with the Account Balance to Account Master Program*
- *Working with the Account Ledger to Account Master Program*

**Note:** *Inquiry Programs for General Accounting*.

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the General Accounting Manager page:

| Component Title | Description |
|---|---|
| G/L Balance by Account (P09217X\|W09217XG) | Use this chart to view the account balances of different accounts.<br>This chart is based on the One View Account Balance Inquiry program (P09217). |
| G/L Transactions Total by Date and Account (P09219X\|W09219XC) | Use this chart to view the General Ledger transactions for different accounts on specific dates.<br>This chart is based on the One View G/L Inquiry program (P09219). |
| Account Balance Trend (P09217X\|W09217XH) | Use this chart to view the account balance trends over a period of time.<br>This chart is based on the One View Account Balance Inquiry program (P09217). |
| Allocations by Account (P0911FX\|W09F11XA) | Use this chart to view the percentage of allocations for different accounts.<br>This chart is based on the Account Ledger Detail program (P0911F). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* :

- *One View Account Balance Inquiry (P09217)*
- *One View G/L Inquiry (P09219)*

**Note:** *Inquiry Programs for General Accounting*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the General Accounting Manager page:

| Task | Description |
|---|---|
| Account Ledger Inquiry | Use this task to access the Account Ledger Inquiry program (P09200).<br>The following form layout is available:<br>• Account Ledger Details<br>The following grid format is available:<br>• Simple |
| Trial Balance/Ledger Comparison | Use this task to access the Trial Balance/Ledger Comparison program (P09210A).<br>The following grid format is available:<br>• Basic |
| Manual Bank Statement Reconciliation | Use this task to access the Manual Bank Statement Reconciliation program (P09631). |
| Allocations Journal Review | Use this task to access the Batches program (P0011, version ZJDE0008).<br>The following form layout is available:<br>• General Journal Review |
| Company by Batch Out of Balance | Use this task to access the Companies by Batch Out of Balance program (P09706).<br>The following form layout is available:<br>• Companies Out of Bal Review |
| Trial Balance Report | Use this task to access the Batch Versions program (P98305W) from where you can run the Trial Balance report (R09410). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* :

- *Reviewing Account Ledgers*
- *Reviewing Budget Comparisons Online*
- *Reconciling Unreconciled Bank Statement Transactions*
- *Reviewing Journal Entries*
- *Working with the Companies by Batch Out of Balance Program*
- *R09410 - Trial Balance Report*

# 27 General Accounting Roles: Additional UX One Components for General Accounting Manager (Release 9.2 Update)

## Additional UX One Components for General Accounting

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own UX One page or customizing existing pages.

**Charts**

These charts are based on EnterpriseOne programs and business views. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries may be associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available for General Accounting:

| Component Title | Description |
|---|---|
| G/L Transactions Total by Account (P09219X\|W09219XA) | Use this chart to view the total General Ledger transaction amount for different accounts.<br><br>This chart is based on the One View G/L Inquiry program (P09219). |
| G/L Transactions Total by Subledger (P09219X\|W09219XB) | Use this chart to view the total General Ledger transaction amounts for each subledger.<br><br>This chart is based on the One View G/L Inquiry program (P09219). |
| Accounts by Currency Code (P0901X\|W0901XA) | Use this chart to view the percentage of account distribution for different currency codes.<br><br>This chart is based on the F0901, F0010 Join business view (V09010R). |

For additional information about the programs associated with these charts, see *One View G/L Inquiry (P09219)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# 28 Grower Management Roles: Crop Manager (Release 9.2 Update)

## Understanding the Crop Manager UX One Role

The Crop Manager role, and the associated UX One pages and components, enable users to:

- Compare crop estimates and costs throughout the growing season.
- Monitor trends in farm activities.
- Know the status of the crop at all times.

The Crop Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Crop Manager role (GRWCROPJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the GRWCROPJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Crop Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Grower Management.*

# Using the Crop Manager UX One Role

You use the Crop Manager role to access these UX One pages:

- Crop Manager Variety Analysis (P40G003X|W40G003XD)
- Crop Manager Growing Cycle (P40G003X|W40G003XA)
- Crop Manager Harvest (P40G003X|W40G003XB)
- Crop Manager Operation Costs (P40G003X|W40G003XC)

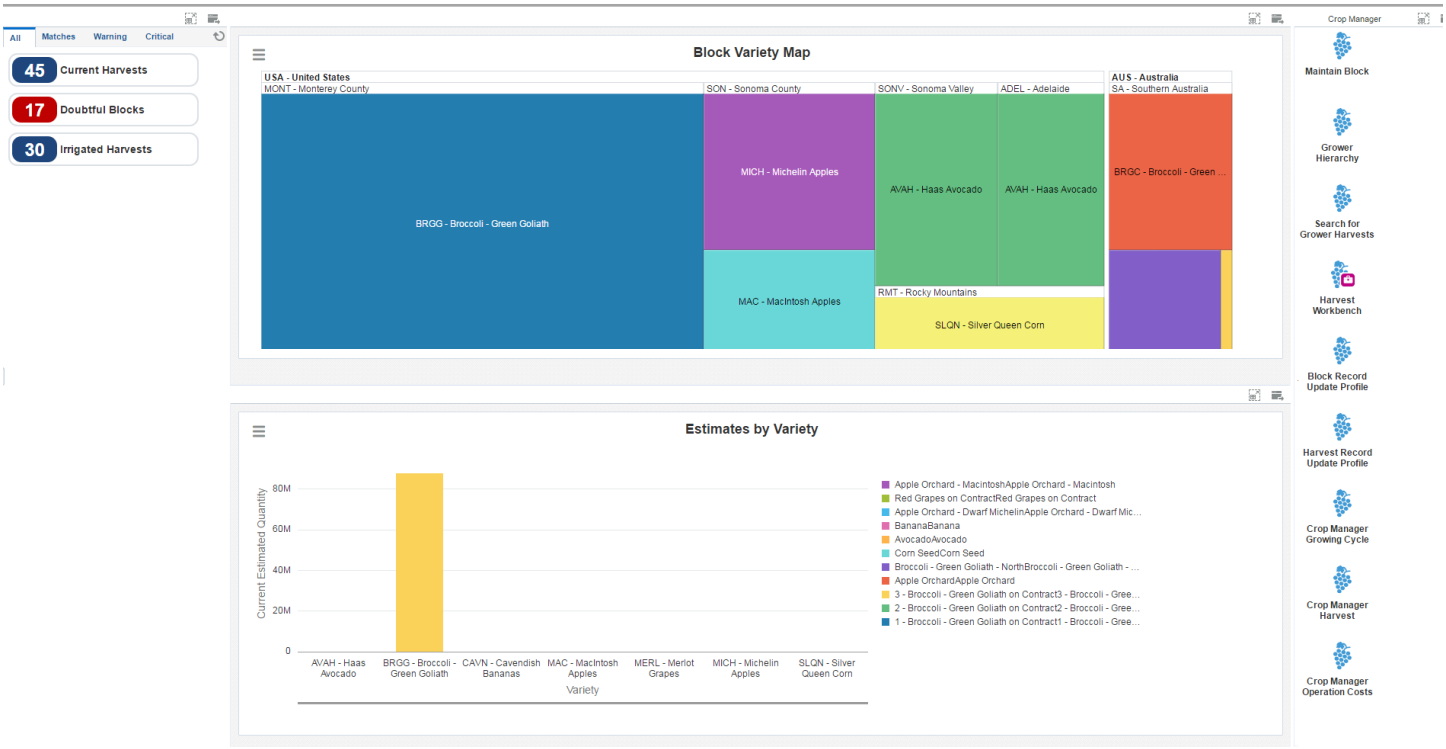
## UX One: Crop Manager Variety Analysis Page

The Crop Manager Variety Analysis page (P40G003X|W40G003XD) enables users to:

- Receive alerts regarding current harvests, blocks of land that may not produce expected harvest, and irrigated harvests.
- Analyze which crop is planted in which block of land and within which geographical area.
- Compare current crop estimates by block.
- Act quickly by easily accessing the Grower Management programs.

To access the UX One Crop Manager Variety Analysis page, log in to the EnterpriseOne system using the Crop Manager role.

This graphic illustrates the Crop Manager Variety Analysis page:


All
Matches
Warning
Critical
45
Current Harvests
17
Doubtful Blocks
30
Irrigated Harvests
Block Variety Map
USA - United States
MONT - Monterey County
SON - Sonoma County
SONV - Sonoma Valley
ADEL - Adelaide
AUS - Australia
SA - Southern Australia
BRGG - Broccoli - Green Goliath
MICH - Michelin Apples
AVAH - Haas Avocado
AVAH - Haas Avocado
BRGC - Broccoli - Green ...
MAC - MacIntosh Apples
RMT - Rocky Mountains
SLQN - Silver Queen Corn
Estimates by Variety
Current Estimated Quantity
80M
60M
40M
20M
0
AVAH - Haas Avocado
BRGG - Broccoli - Green Goliath
CAVN - Cavendish Bananas
MAC - MacIntosh Apples
MERL - Merlot Grapes
MICH - Michelin Apples
SLQN - Silver Queen Corn
Variety
Apple Orchard - MacintoshApple Orchard - Macintosh
Red Grapes on ContractRed Grapes on Contract
Apple Orchard - Dwarf MichelinApple Orchard - Dwarf Mic...
BananaBanana
AvocadoAvocado
Corn SeedCorn Seed
Broccoli - Green Goliath - NorthBroccoli - Green Goliath - ...
Apple OrchardApple Orchard
3 - Broccoli - Green Goliath on Contract3 - Broccoli - Gree...
2 - Broccoli - Green Goliath on Contract2 - Broccoli - Gree...
1 - Broccoli - Green Goliath on Contract1 - Broccoli - Gree...
Crop Manager
Maintain Block
Grower Hierarchy
Search for Grower Harvests
Harvest Workbench
Block Record Update Profile
Harvest Record Update Profile
Crop Manager Growing Cycle
Crop Manager Harvest
Crop Manager Operation Costs

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Crop Manager Variety Analysis page:

| Watchlist Alert | Description |
|---|---|
| Current Harvests | This alert tells users the number of harvest records that have a status of “current."<br><br>This alert is based on the Harvest Workbench - Manage Harvests program (P40G032).<br><br>When you click the alert, the system displays the Manage Harvest form. |
| Doubtful Blocks | This alert tells users the number of blocks for which the harvest status is “current," but the planted area is blank or unusually small.<br><br>This alert is based on the Search for Harvests - Search for Grower Harvests program (P40G03).<br><br>When you click the alert, the system displays the Search for Grower Harvests form. |
| Irrigated Harvests | This alert tells users the number of current harvest records for which there is an irrigation method specified.<br><br>This alert is based on the Search for Harvests - Search for Grower Harvests program (P40G03).<br><br>When you click the alert, the system displays the Search for Grower Harvests form. |

For additional information about the programs accessed by these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Entering Farms, Blocks, and Harvests*
- *Using the Harvest Workbench*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Crop Manager Variety Analysis page:

| Component Title | Description |
|---|---|
| Block Variety Map (P40G03X\|W40G03XB) | Use this chart to view relative sizes of blocks of land and the varieties growing on each.<br><br>This chart is based on the Search for Harvests - Search for Grower Harvests program (P40G03). |

| Component Title | Description |
|---|---|
| Estimates by Variety (P40G03X\|W40G03XA) | Use this chart to review the current estimated quantity for various blocks, by variety.<br><br>This chart is based on the Search for Harvests - Search for Grower Harvests (P40G03). |

For additional information about the programs accessed by these charts, see *Entering Farms, Blocks, and Harvests* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Crop Manager Variety Analysis page:

| Task | Description |
|---|---|
| Maintain Block | Use this task to access the Maintain Block - Search for Grower Blocks program (P40G02). |
| Grower Hierarchy | Use this task to access the Grower Hierarchy - Grower Hierarchy program (P40G0400). |
| Search for Grower Harvests | Use this task to access the Search for Grower Harvests - Search for Grower Harvests program (P40G03). |
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvests program (P40G032). |
| Block Record Update Profile | Use this task to access the Block Record Update Profile - Search for Grower Block Update Profiles program (P40G0200). |
| Harvest Record Update Profile | Use this task to access the Harvest Record Update Profile - Search for Grower Harvest Update Profiles program (P40G0300). |
| Crop Manager Growing Cycle | Use this task to access the Crop Manager Growing Cycle page (P40G003X\|W40G003XA). |
| Crop Manager Harvest | Use this task to access the Crop Manager Harvest page (P40G003X\|W40G003XB). |
| Crop Manager Operation Costs | Use this task to access the Crop Manager Operation Costs page (P40G003X\|W40G003XC). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Entering Farms, Blocks, and Harvests*
- *Using the Harvest Workbench*

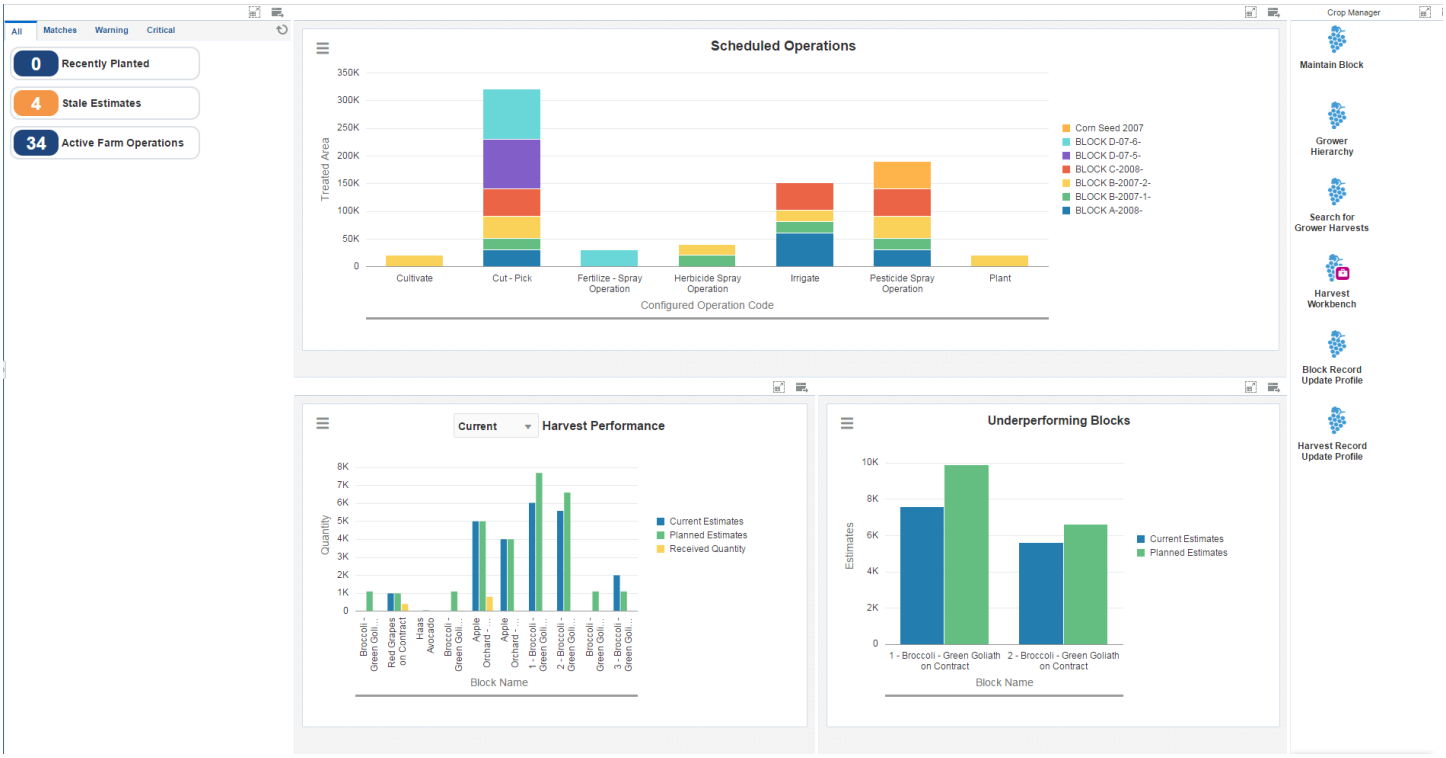
# UX One: Crop Manager Growing Cycle Page

The Crop Manager Growing Cycle page (P40G003X|W40G003XA) enables users to:

- Receive alerts regarding recently planted crops, current estimates that haven't been updated recently, and active farm operations.
- Analyze the scheduled farm operations, harvest performance, and identify underperforming blocks.
- Act quickly by easily accessing the Grower Management programs.

To access the UX One Crop Manager Growing Cycle page, log in to the EnterpriseOne system using the Crop Manager role. When you log in with this role, the system automatically displays the Crop Manager page. Click the Crop Manager Growing Cycle task on the springboard to access the Crop Manager Growing Cycle page.

This graphic illustrates the Crop Manager Growing Cycle page:


All
Matches
Warning
Critical
0
Recently Planted
4
Stale Estimates
34
Active Farm Operations
Scheduled Operations
Treated Area
350K
300K
250K
200K
150K
100K
50K
0
Cultivate
Cut - Pick
Fertilize - Spray Operation
Herbicide Spray Operation
Irrigate
Pesticide Spray Operation
Plant
Configured Operation Code
Corn Seed 2007
BLOCK D-07-6-
BLOCK D-07-5-
BLOCK C-2008-
BLOCK B-2007-2-
BLOCK B-2007-1-
BLOCK A-2008-
Crop Manager
Maintain Block
Grower Hierarchy
Search for Grower Harvests
Harvest Workbench
Block Record Update Profile
Harvest Record Update Profile
Current
Harvest Performance
Quantity
8K
7K
6K
5K
4K
3K
2K
1K
0
Current Estimates
Planned Estimates
Received Quantity
Block Name
Underperforming Blocks
Estimates
10K
8K
6K
4K
2K
0
1 - Broccoli - Green Goliath on Contract
2 - Broccoli - Green Goliath on Contract
Current Estimates
Planned Estimates
Block Name

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Crop Manager Growing Cycle page:

| Watchlist Alert | Description |
|---|---|
| Recently Planted | This alert tells users the number of current harvest records that were planted in the date range specified in the advanced query.<br><br>This alert is based on the Search for Harvests - Search for Grower Harvests program (P40G03).<br><br>When you click the alert, the system displays the Search for Grower Harvests form. |
| Stale Estimates | This alert tells users the number of current harvest estimates that have not been updated after the date specified in the advanced query.<br><br>This alert is based on the Search for Harvests - Search for Grower Harvests program (P40G03).<br><br>When you click the alert, the system displays the Search for Grower Harvests form. |
| Active Farm Operations | This alert tells users the number of farm operations that are currently at active status.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |

For additional information about the programs accessed by these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Entering Farms, Blocks, and Harvests*
- *Entering Grower Operations*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Crop Manager Growing Cycle page:

| Component Title | Description |
|---|---|
| Scheduled Operations (P31B65JX\| W31B65JXA) | Use this chart to review the farm operations that are scheduled for various blocks of land.<br><br>This chart is based on the Farm Operations Inquiry - Farm Operations Inquiry program (P40G65). |

| Component Title | Description |
|---|---|
| Harvest Performance (P40G032X\| W40G032XA) | Use this chart to review the harvest performance based on the current estimates, planned estimates, and quantity received.<br><br>This chart is based on the Harvest Workbench - Manage Harvests program (P40G032).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select from these harvest status:<br><br>• Closed<br>• Complete<br>• Current<br>• Future<br>• Terminated |
| Underperforming Blocks (P40G032X\| W40G032XB) | Use this chart to review the blocks of land for which the current estimate is less than the planned estimate.<br><br>This chart is based on the Harvest Workbench - Manage Harvest program (P40G032). |

For additional information about the programs accessed by these charts, see *Using the Harvest Workbench* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Crop Manager Growing Cycle page:

| Task | Description |
|---|---|
| Maintain Block | Use this task to access the Maintain Block - Search for Grower Blocks program (P40G02). |
| Grower Hierarchy | Use this task to access the Grower Hierarchy - Grower Hierarchy program (P40G0400). |
| Search for Grower Harvests | Use this task to access the Search for Grower Harvests - Search for Grower Harvests program (P40G03). |
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvests program (P40G032). |
| Block Record Update Profile | Use this task to access the Block Record Update Profile - Search for Grower Block Update Profiles program (P40G0200). |
| Harvest Record Update Profile | Use this task to access the Harvest Record Update Profile - Search for Grower Harvest Update Profiles program (P40G0300). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Entering Farms, Blocks, and Harvests*
- *Using the Harvest Workbench*

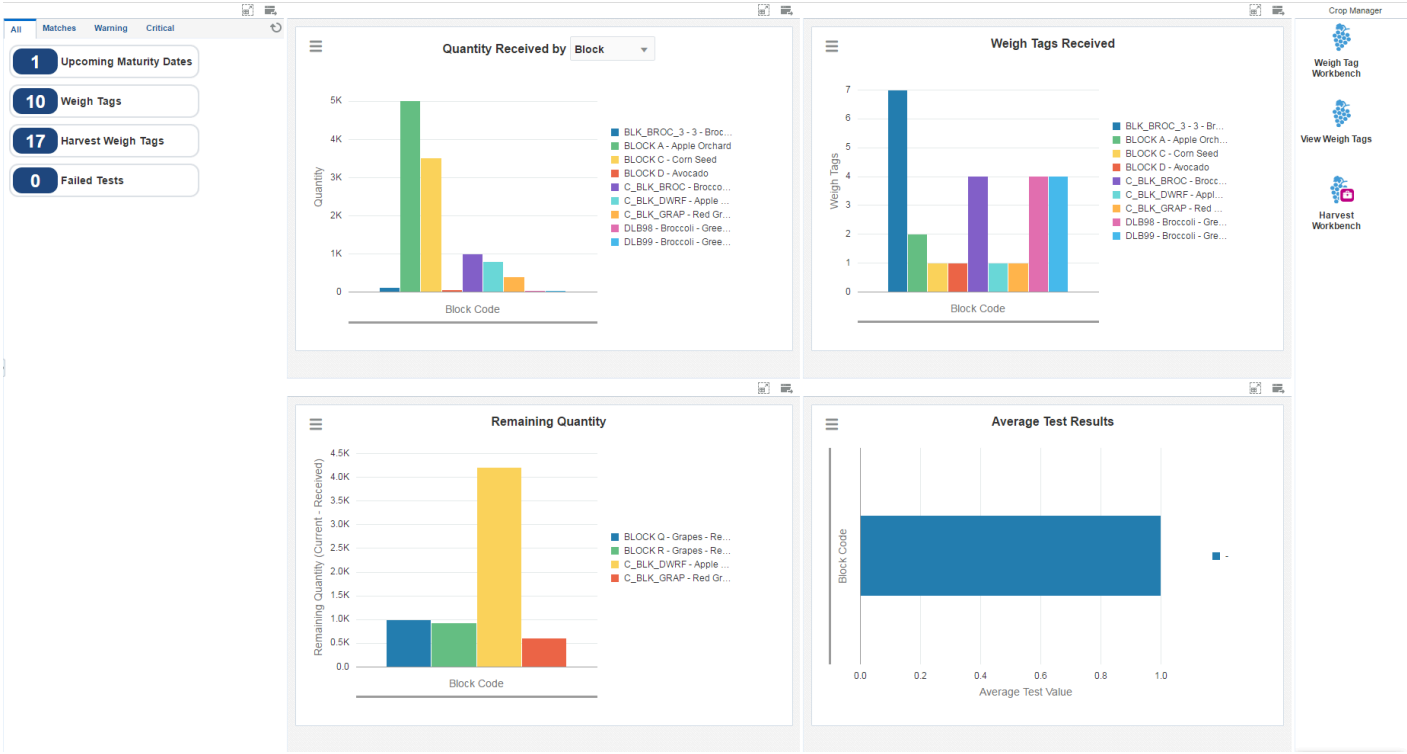
# UX One: Crop Manager Harvest Page

The Crop Manager Harvest page (P40G003X|W40G003XB) enables users to:

- Receive alerts regarding the upcoming maturity dates of crops, weigh tags, and crops that failed quality tests.
- Analyze quantity of crops received, weigh tags received, and average test results.
- Act quickly by easily accessing the Grower Management programs.

To access the UX One Crop Manager Harvest page, log in to the EnterpriseOne system using the Crop Manager role. When you log in with this role, the system automatically displays the Crop Manager page. Click the Crop Manager Harvest task on the springboard to access the Crop Manager Harvest page.

This graphic illustrates the Crop Manager Harvest page:


All
Matches
Warning
Critical
1
Upcoming Maturity Dates
10
Weigh Tags
17
Harvest Weigh Tags
0
Failed Tests
Quantity Received by
Block
Quantity
Block Code
BLK_BROC_3 - 3 - Broc...
BLOCK A - Apple Orchard
BLOCK C - Corn Seed
BLOCK D - Avocado
C_BLK_BROC - Brocco...
C_BLK_DWRF - Apple ...
C_BLK_GRAP - Red Gr...
DLB98 - Broccoli - Gree...
DLB99 - Broccoli - Gree...
Weigh Tags Received
Weigh Tags
Block Code
BLK_BROC_3 - 3 - Br...
BLOCK A - Apple Orch...
BLOCK C - Corn Seed
BLOCK D - Avocado
C_BLK_BROC - Brocc...
C_BLK_DWRF - Appl...
C_BLK_GRAP - Red ...
DLB98 - Broccoli - Gre...
DLB99 - Broccoli - Gre...
Crop Manager
Weigh Tag Workbench
View Weigh Tags
Harvest Workbench
Remaining Quantity
Remaining Quantity (Current - Received)
Block Code
BLOCK Q - Grapes - Re...
BLOCK R - Grapes - Re...
C_BLK_DWRF - Apple ...
C_BLK_GRAP - Red Gr...
Average Test Results
Block Code
Average Test Value

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Crop Manager Harvest page:

| Watchlist Alert | Description |
|---|---|
| Upcoming Maturity Dates | This alert tells users the number of harvests which have a planned maturity date that is after the date specified in the advanced query.<br><br>This alert is based on the Harvest Workbench - Manage Harvests program (P40G032).<br><br>When you click the alert, the system displays the Manage Harvests form. |
| Weigh Tags | This alert tells users the number of weigh tag operations that are at active status.<br><br>This alert is based on the Operation Search - Search For Operations program (P31B94).<br><br>When you click the alert, the system displays the Search For Operations form. |
| Harvest Weigh Tags | This alert tells users the number of harvest weigh tags that are currently available.<br><br>This alert is based on the Weigh Tag Inquiry - Weigh Tag Inquiry program (P31B85).<br><br>When you click the alert, the system displays the Weigh Tag Inquiry form. The following form layout is available:<br><br>• Weigh Tags<br>The following grid formats are available:<br><br>• Basic<br>• Simple |
| Failed Tests | This alert tells users the number of test operations that have failing results, within the date range specified in the advanced query.<br><br>This alert is based on the Test Results Inquiry - Test Results Analysis program (P37902).<br><br>When you click the alert, the system displays the Test Results Inquiry form. The following form layout is available:<br><br>• Block Information<br>The following grid formats are available:<br><br>• Basic<br>• Simple |

For additional information about the programs accessed by these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Using the Harvest Workbench*
- *Entering Grower Operations*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Crop Manager Harvest page:

| Component Title | Description |
|---|---|
| Quantity Received (P40G85X\|W40G85XA) | Use this chart to review the quantity of crop received.<br><br>This chart is based on the Weigh Tag Inquiry - Weigh Tag Inquiry program (P31B85).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that they system displays. You can select:<br><br>• Block<br>• Variety |
| Weigh Tags Received (P40G85X\|W40G85XB) | Use this chart to review the number of weigh tags received from various blocks of land.<br><br>This chart is based on the Weigh Tag Inquiry - Weigh Tag Inquiry program (P31B85). |
| Remaining Quantity (P40G032X\|W40G032XC) | Use this chart to review the quantity of crops that is yet to be received from various blocks of land.<br><br>This chart is based on the Harvest Workbench - Manage Harvest program (P40G032). |
| Average Test Results (P40G902X\|W40G902XA) | Use this chart to review the average test results from various blocks of land. The advanced query restricts this chart to one result name. It is important that the test value be numeric.<br><br>This chart is based on the Test Results Inquiry - Test Results Analysis program (P37902). |

For additional information about the programs accessed by these charts, see *Using the Harvest Workbench* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Crop Manager Harvest page:

| Task | Description |
|---|---|
| Weigh Tag Workbench | Use this task to access the Weigh Tag Workbench - Search For Operations program (P31B94). |

| Task | Description |
|---|---|
| | |
| View Weigh Tags | Use this task to access the View Weigh Tags - View Weigh Tags program (P40G33). |
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvests program (P40G032). |

For additional information about the programs accessed by these tasks, see these topics:

- *Using the Harvest Workbench* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*
- *Managing Operations* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*

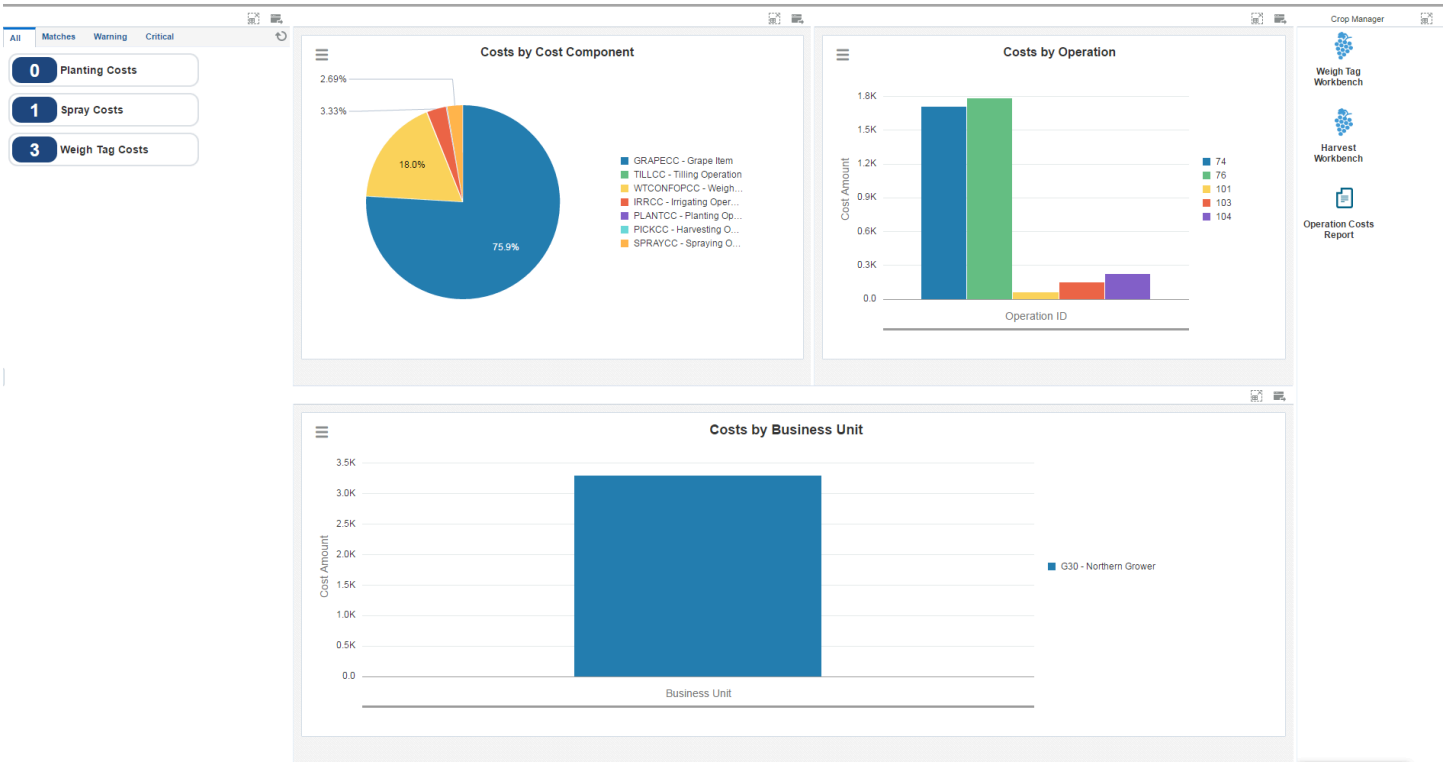
# UX One: Crop Manager Operation Costs Page

The Crop Manager Operation Costs page (P40G003X|W40G003XC) enables users to:

- Receive alerts regarding the cost of planting, cost of spraying, and cost of weigh tags.
- Analyze costs by various cost components, costs of various farm operations, and costs by business unit.
- Act quickly by easily accessing the Grower Management programs.

To access the UX One Crop Manager Operation Costs page, log in to the EnterpriseOne system using the Crop Manager role. When you log in with this role, the system automatically displays the Crop Manager page. Click the Crop Manager Operation Costs task on the springboard to access the Crop Manager Operation Costs page.

This graphic illustrates the Crop Manager Operation Costs page:


All
Matches
Warning
Critical
0
Planting Costs
1
Spray Costs
3
Weigh Tag Costs
Costs by Cost Component
2.69%
3.33%
18.0%
75.9%
GRAPECC - Grape Item
TILLCC - Tilling Operation
WTCONFOPCC - Weigh...
IRRCC - Irrigating Oper...
PLANTCC - Planting Op...
PICKCC - Harvesting O...
SPRAYCC - Spraying O...
Costs by Operation
Cost Amount
1.8K
1.5K
1.2K
0.9K
0.6K
0.3K
0.0
Operation ID
74
76
101
103
104
Costs by Business Unit
Cost Amount
3.5K
3.0K
2.5K
2.0K
1.5K
1.0K
0.5K
0.0
Business Unit
G30 - Northern Grower
Crop Manager
Weigh Tag Workbench
Harvest Workbench
Operation Costs Report

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Crop Manager Operation Costs page:

| Watchlist Alert | Description |
|---|---|
| Planting Costs | This alert tells users the accumulated costs on operations which have a configured operation code that represents “planting" and a cost component for planting costs.<br><br>This alert is based on the Operation Header Inquiry - Operation Header Inquiry program (P31B65).<br><br>When you click the alert, the system displays the Operation Header Inquiry form. The following form layouts are available:<br><br>• Grower Operation Details<br>• Operation Header Details (Release 9.2 Update)<br>The following grid formats are available:<br><br>• Basic<br>• Simple |
| Spray Costs | This alert tells users the accumulated costs on spray operations that have a cost component for spraying costs.<br><br>This alert is based on the Operation Header Inquiry - Operation Header Inquiry program (P31B65).<br><br>When you click the alert, the system displays the Operation Header Inquiry form. The following form layouts are available:<br><br>• Grower Operation Details<br>• Operation Header Details (Release 9.2 Update)<br>The following grid formats are available:<br><br>• Basic<br>• Simple |
| Weigh Tag Costs | This alert tells users the amounts from the weigh tag cost component on weigh tag operations.<br><br>This alert is based on the Operation Header Inquiry - Operation Header Inquiry program (P31B65).<br><br>When you click the alert, the system displays the Operation Header Inquiry form. The following form layouts are available:<br><br>• Grower Operation Details<br>• Operation Header Details (Release 9.2 Update)<br>The following grid formats are available:<br><br>• Basic |

| Watchlist Alert | Description |
|---|---|
| | • Simple |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Crop Manager Operation Costs page:

| Component Title | Description |
|---|---|
| Costs by Cost Component (P40G65X\|W40G65XA) | Use this chart to review the percentage of various costs by cost component, by percentage. The advanced query restricts this chart to costs on Weigh Tag operations.<br><br>This chart is based on the Operation Header Inquiry - Operation Header Inquiry program (P31B65). |
| Costs by Operation (P40G65X\|W40G65XB) | Use this chart to review the accumulated costs by various farm operations.<br><br>This chart is based on the Operation Header Inquiry - Operation Header Inquiry program (P31B65). |
| Costs by Business Unit (P40G65X\|W40G65XC) | Use this chart to review the accumulated costs by various business units.<br><br>This chart is based on the Operation Header Inquiry - Operation Header Inquiry program (P31B65). |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Crop Manager Operation Costs page:

| Task | Description |
|---|---|
| Weigh Tag Workbench | Use this task to access the Weigh Tag Workbench - Search For Operations program (P31B94). |
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvests program (P40G032). |
| Operation Costs Report | Use this task to access the operation costs report. (R31B310) |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Using the Harvest Workbench*
- *Entering Grower Operations*

# 29 Grower Management Roles: Field Manager (Release 9.2 Update)

## Understanding the Field Manager UX One Role

The Field Manager role, and the associated UX One pages and components, enable users to:

- Monitor the activities taking place out in the field.
- Identify blocks of land that are performing outside of expectations.
- Review locations where resources need to be coordinated.

The Field Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Field Manager role (GRFIELDJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the GRFIELDJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Field Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Grower Management.*

# Using the Field Manager UX One Role

You use the Field Manager role to access these UX One pages:

- Field Manager Activities (P40G004X|W40G004XA)
- Field Manager Harvest Planning (P40G004X|W40G004XB)
- Field Manager Guidance (P40G004X|W40G004XC)

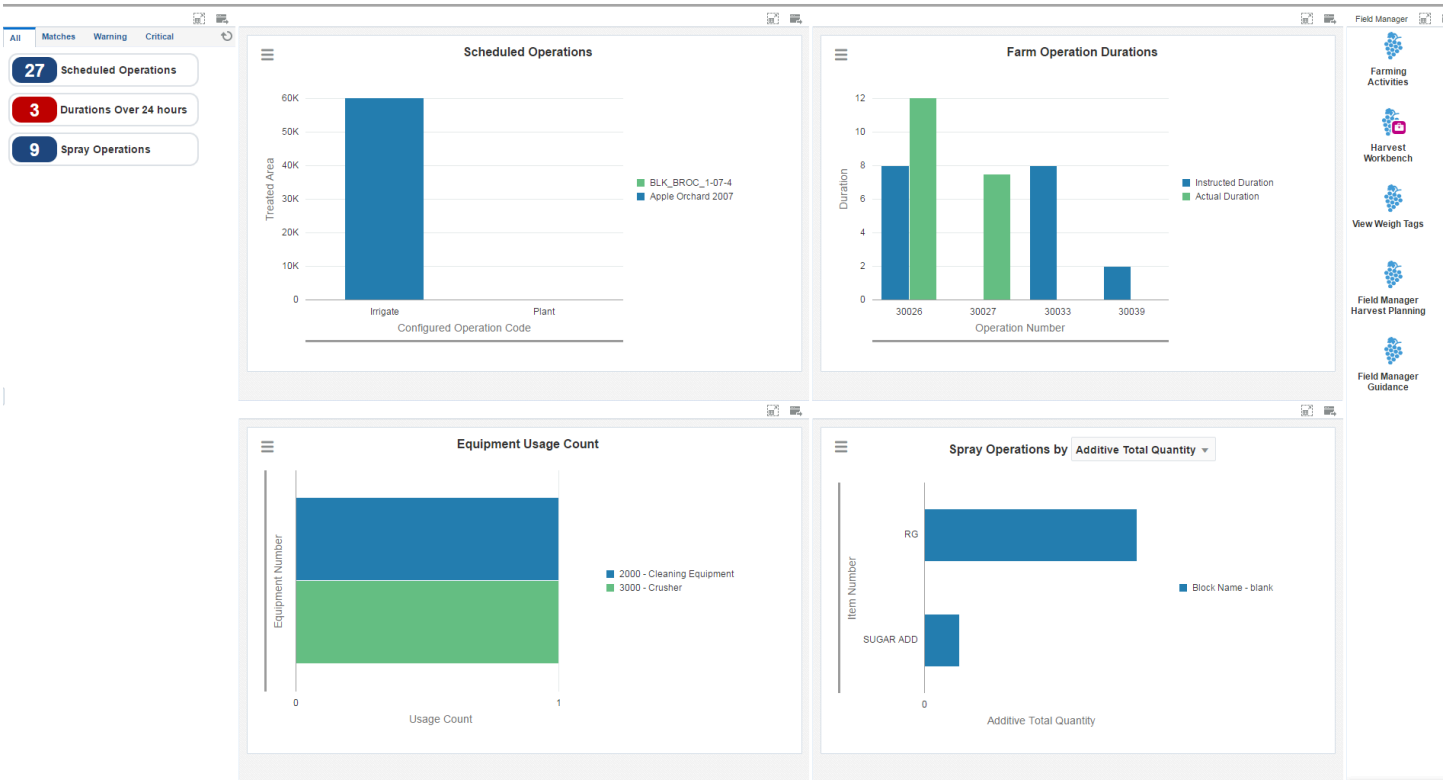
## UX One: Field Manager Activities Page

The Field Manager Activities page (P40G004X|W40G004XA) enables users to:

- Receive alerts regarding the number of scheduled operations, spray operations, and farm operations that will last more than 24 hours.
- Analyze scheduled farm operations, durations of various farm operations, and equipment usage.
- Act quickly by easily accessing the Grower Management programs.

To access the UX One Field Manager Activities page, log in to the EnterpriseOne system using the Field Manager role.

This graphic illustrates the Field Manager Activities page:


All
Matches
Warning
Critical
27
Scheduled Operations
3
Durations Over 24 hours
9
Spray Operations
Scheduled Operations
60K
50K
40K
30K
20K
10K
0
Treated Area
Irrigate
Plant
Configured Operation Code
BLK_BROC_1-07-4
Apple Orchard 2007
Farm Operation Durations
12
10
8
6
4
2
0
Duration
30026
30027
30033
30039
Operation Number
Instructed Duration
Actual Duration
Field Manager
Farming Activities
Harvest Workbench
View Weigh Tags
Field Manager Harvest Planning
Field Manager Guidance
Equipment Usage Count
Equipment Number
0
1
Usage Count
2000 - Cleaning Equipment
3000 - Crusher
Spray Operations by
Additive Total Quantity
Item Number
RG
SUGAR ADD
0
Additive Total Quantity
Block Name - blank

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Field Manager Activities page:

| Watchlist Alert | Description |
|---|---|
| Scheduled Operations | This alert tells users the number of farm operations that are scheduled.<br>This alert is based on the Farm Operations Inquiry - Farm Operations Inquiry program (P40G65).<br>When you click the alert, the system displays the Farm Operations Inquiry form. The following form layout is available:<br>• Grower Operation Details<br>The following grid formats are available:<br>• Basic<br>• Simple |
| Durations Over 24 Hours | This alert tells users the number of farm operations that will be performed for more than 24 hours.<br>This alert is based on the Farm Operations Inquiry - Farm Operations Inquiry program (P40G65).<br>When you click the alert, the system displays the Farm Operations Inquiry form. The following form layout is available:<br>• Grower Operation Details<br>The following grid formats are available:<br>• Basic<br>• Simple |
| Spray Operations | This alert tells users the number of spray operations that are currently being performed.<br>This alert is based on the Operation Additives Inquiry - Operation Additives Inquiry program (P31B99).<br>When you click the alert, the system displays the Operation Additives Inquiry form. The following form layout is available:<br>• Consumables Inquiry Operation (Release 9.2 Update)<br>The following grid format is available:<br>• Basic |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Field Manager Activities page:

| Component Title | Description |
|---|---|
| Scheduled Operations (P31B65JX\|W31B65JXA) | Use this chart to review the farm operations to be performed on various blocks.<br><br>This chart is based on the Farm Operations Inquiry - Farm Operations Inquiry program (P40G65). |
| Farm Operation Durations (P31B65X\|W31B65XA) | Use this chart to review the instructed duration and actual duration for various farm operations.<br><br>This chart is based on the Operation Header Inquiry - Operation Header Inquiry program (P31B65). |
| Equipment Usage Count (P31B122X\|W31B122XA) | Use this chart to review the number of times a piece of equipment is used.<br><br>This chart is based on the Equipment History Inquiry - Equipment History Inquiry program (P31B122). |
| Spray Operations (P31B99X\|W31B99XB) | Use this chart to review the spray operations performed on various blocks.<br><br>This chart is based on the Operation Additives Inquiry - Operation Additives Inquiry program (P31B99).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select from these options:<br><br>• Additive Total Quantity<br>• Treated Area |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Field Manager Activities page:

| Task | Description |
|---|---|
| Farming Activities | Use this task to access the Farming Activities - Search For Operations program (P31B94). |
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvests program (P40G032). |
| View Weigh Tags | Use this task to access the View Weigh Tags - View Weigh Tags program (P40G33). |
| Field Manager Harvest Planning | Use this task to access the Field Manager Harvest Planning page (P40G004X\|W40G004XB). |
| Field Manager Guidance | Use this task to access the Field Manager Guidance page (P40G004X\|W40G004XC). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Using the Harvest Workbench*
- *Entering Grower Operations*

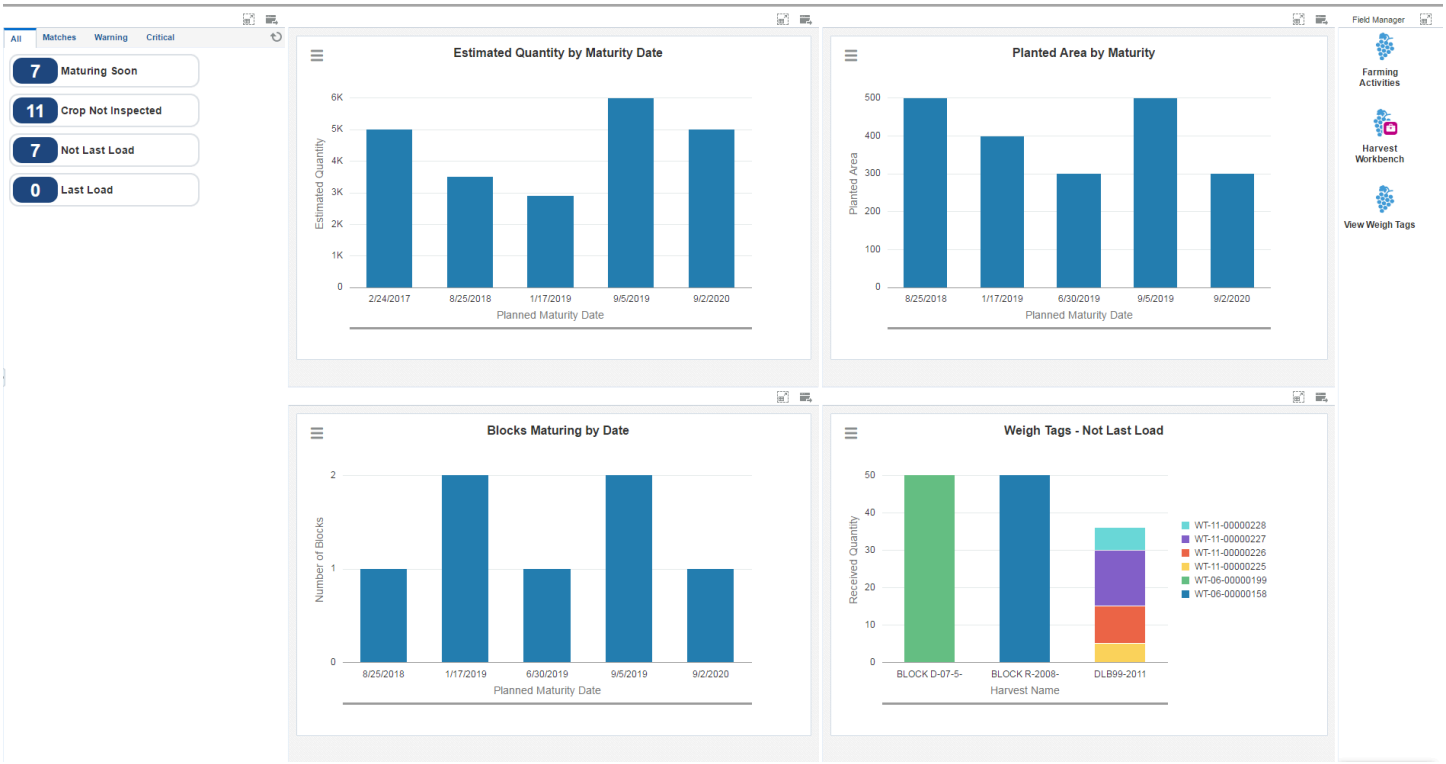
# UX One: Field Manager Harvest Planning Page

The Field Manager Harvest Planning page (P40G004X|W40G004XB) enables users to:

- Receive alerts regarding crops that are maturing, crops that are not inspected, and crops whose last load has been received or not received.
- Analyze estimated quantity of crops, planted area, and blocks of land based on their maturity date.
- Analyze quantities received on weigh tags that are not flagged as the last load.
- Act quickly by easily accessing the Grower Management programs.

To access the UX One Field Manager Harvest Planning page, log in to the EnterpriseOne system using the Field Manager role. When you log in with this role, the system automatically displays the Field Manager page. Click the Field Manager Harvest Planning task on the springboard to access the Field Manager Harvest Planning page.

This graphic illustrates the Field Manager Harvest Planning page:


All
Matches
Warning
Critical
7
Maturing Soon
11
Crop Not Inspected
7
Not Last Load
0
Last Load
Estimated Quantity by Maturity Date
Estimated Quantity
6K
5K
4K
3K
2K
1K
0
2/24/2017
8/25/2018
1/17/2019
9/5/2019
9/2/2020
Planned Maturity Date
Planted Area by Maturity
Planted Area
500
400
300
200
100
0
8/25/2018
1/17/2019
6/30/2019
9/5/2019
9/2/2020
Planned Maturity Date
Field Manager
Farming Activities
Harvest Workbench
View Weigh Tags
Blocks Maturing by Date
Number of Blocks
2
1
0
8/25/2018
1/17/2019
6/30/2019
9/5/2019
9/2/2020
Planned Maturity Date
Weigh Tags - Not Last Load
Received Quantity
50
40
30
20
10
0
BLOCK D-07-5-
BLOCK R-2008-
DLB99-2011
Harvest Name
WT-11-00000228
WT-11-00000227
WT-11-00000226
WT-11-00000225
WT-06-00000199
WT-06-00000158

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Field Manager Harvest Planning page:

| Watchlist Alert | Description |
|---|---|
| Maturing Soon | This alert tells users the number of crops that will be maturing in the next few weeks.<br>This alert is based on the Search for Harvests - Search for Grower Harvests program (P40G03).<br>When you click the alert, the system displays the Search for Grower Harvests form. |
| Crop Not Inspected | This alert tells users the number of crops that are not inspected.<br>This alert is based on the Grower Weigh Tag Inquiry - Grower Weigh Tag Inquiry program (P31B86).<br>When you click the alert, the system displays the Grower Weigh Tag Inquiry form. The following form layouts are available:<br>• Weigh Tags<br>• Weigh Tag Operation Details (Release 9.2 Update)<br>The following grid formats are available:<br>• Basic<br>• Simple |
| Not Last Load | This alert tells users the number of crops for which more than one truckload is yet to be received.<br>This alert is based on the Grower Weigh Tag Inquiry - Grower Weigh Tag Inquiry program (P31B86).<br>When you click the alert, the system displays the Grower Weigh Tag Inquiry form. The following form layouts are available:<br>• Weigh Tags<br>• Weigh Tag Operation Details (Release 9.2 Update)<br>The following grid formats are available:<br>• Basic<br>• Simple |
| Last Load | This alert tells users the number of crops for which the weigh tag of the final truckload is received.<br>This alert is based on the Grower Weigh Tag Inquiry - Grower Weigh Tag Inquiry program (P31B86).<br>When you click the alert, the system displays the Grower Weigh Tag Inquiry form. The following form layouts are available:<br>• Weigh Tags<br>• Weigh Tag Operation Details (Release 9.2 Update) |

| Watchlist Alert | Description |
|---|---|
| | The following grid formats are available:<br>• Basic<br>• Simple |

For additional information about the programs accessed by these charts, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Understanding Weigh Tag Operations*
- *Entering Farms, Blocks, and Harvests*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Field Manager Harvest Planning page:

| Component Title | Description |
|---|---|
| Estimated Quantity by Maturity Date (P40G03X\|W40G03XF) | Use this chart to review the estimated quantity of crops harvested by the planned maturity date.<br>This chart is based on the Search for Harvests - Search for Grower Harvest program (P40G03). |
| Planted Area by Maturity (P40G03X\|W40G03XD) | Use this chart to review the planted areas by the planned maturity date.<br>This chart is based on the Search for Harvests - Search for Grower Harvest program (P40G03). |
| Blocks Maturing by Date (P40G03X\|W40G03XE) | Use this chart to review the blocks in which crops are maturing on a specific date.<br>This chart is based on the Search for Harvests - Search for Grower Harvest program (P40G03). |
| Weigh Tags - Not Last Load (P31B85JX\|W31B85JXA) | Use this chart to review the number of weigh tags received from various blocks for which more than one truckload of crops is yet to be received.<br>This chart is based on the Grower Weigh Tag Inquiry - Grower Weigh Tag Inquiry program (P31B86). |

For additional information about the programs accessed by these charts, see *Entering Farms, Blocks, and Harvests* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Field Manager Harvest Planning page:

| Task | Description |
|---|---|
| Farming Activities | Use this task to access the Farming Activities - Search For Operations program (P31B94). |
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvests program (P40G032). |
| View Weigh Tags | Use this task to access the View Weigh Tags - View Weigh Tags program (P40G33). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Using the Harvest Workbench*
- *Entering Grower Operations*

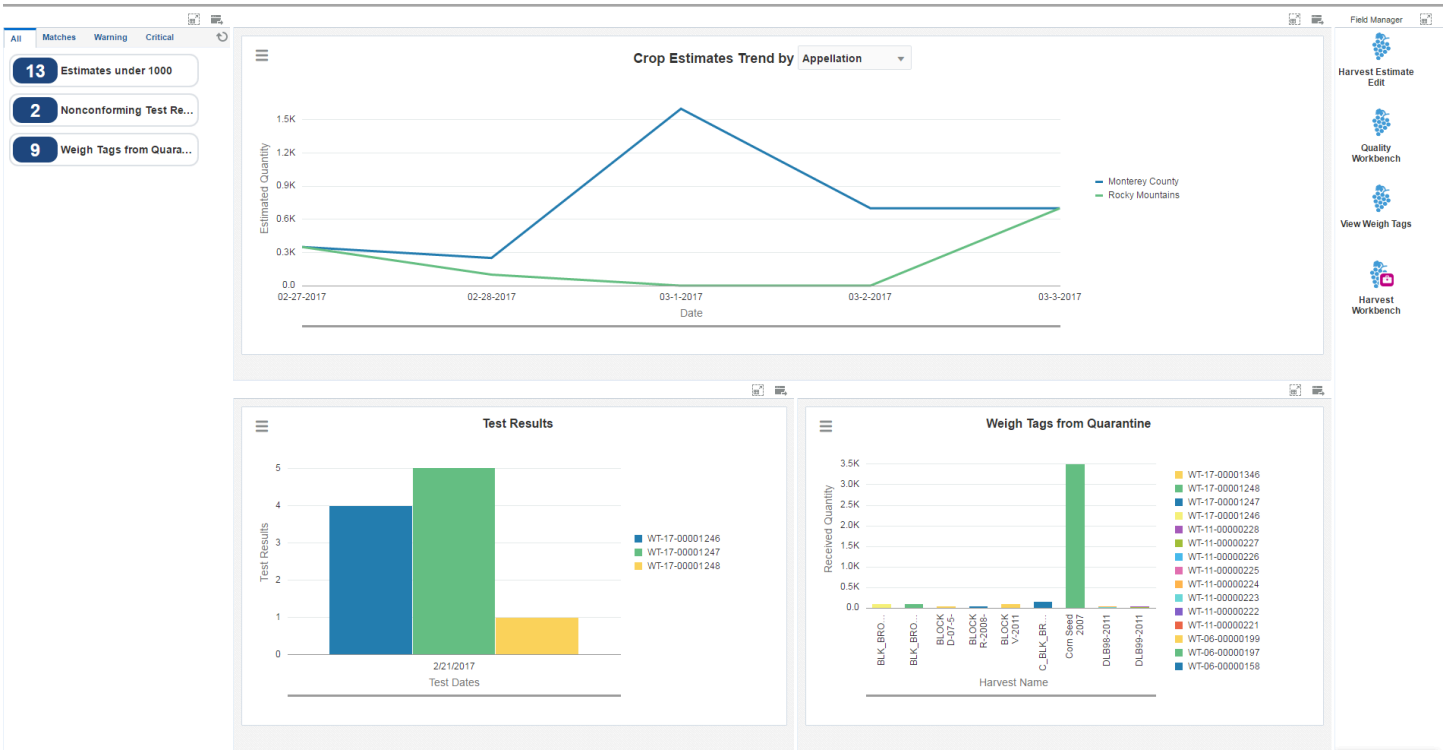
# UX One: Field Manager Guidance Page

The Field Manager Guidance page (P40G004X|W40G004XC) enables users to:

- Receive alerts about blocks of land for which frozen estimates are under 1000 units, and about nonconforming test results and weigh tags from quarantined harvests.
- Analyze crop estimate trends, test results of crops, and weigh tags from quarantined harvests.
- Act quickly by easily accessing the Grower Management programs.

To access the UX One Field Manager Guidance page, log in to the EnterpriseOne system using the Field Manager role. When you log in with this role, the system automatically displays the Field Manager page. Click the Field Manager Guidance task on the springboard to access the Field Manager Guidance page.

This graphic illustrates the Field Manager Guidance page:


All
Matches
Warning
Critical
13
Estimates under 1000
2
Nonconforming Test Re...
9
Weigh Tags from Quara...
Crop Estimates Trend by
Appellation
Estimated Quantity
1.5K
1.2K
0.9K
0.6K
0.3K
0.0
02-27-2017
02-28-2017
03-1-2017
03-2-2017
03-3-2017
Date
Monterey County
Rocky Mountains
Field Manager
Harvest Estimate Edit
Quality Workbench
View Weigh Tags
Harvest Workbench
Test Results
Test Results
5
4
3
2
1
0
2/21/2017
Test Dates
WT-17-00001246
WT-17-00001247
WT-17-00001248
Weigh Tags from Quarantine
Received Quantity
3.5K
3.0K
2.5K
2.0K
1.5K
1.0K
0.5K
0.0
BLK_BRO...
BLK_BRO...
BLOCK D-07-5-
BLOCK R-2008
BLOCK V-2011
C_BLK_BR...
Corn Seed 2007
DLB98-2011
DLB99-2011
Harvest Name
WT-17-00001346
WT-17-00001248
WT-17-00001247
WT-17-00001246
WT-11-00000228
WT-11-00000227
WT-11-00000226
WT-11-00000225
WT-11-00000224
WT-11-00000223
WT-11-00000222
WT-11-00000221
WT-06-00000199
WT-06-00000197
WT-06-00000158

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Field Manager Guidance page:

| Watchlist Alert | Description |
|---|---|
| Estimates under 1000 | This alert tells users the number of blocks of land for which the frozen estimate is less than 1000 units.<br>This alert is based on the Frozen Estimates Inquiry - Frozen Estimates Inquiry program (P40G22).<br>When you click the alert, the system displays the Frozen Estimates Inquiry form. The following form layout is available:<br>• Grower Harvest Details<br>The following grid formats are available:<br>• Basic<br>• Simple |
| Nonconforming Test Results | This alert tells users the number of crops from a business unit that failed a quality test.<br>This alert is based on the Test Results Inquiry - Test Results Analysis program (P37902).<br>When you click the alert, the system displays the Test Results Inquiry form. The following form layout is available:<br>• Block Information<br>The following grid formats are available:<br>• Basic<br>• Simple |
| Weigh Tags from Quarantine | This alert tells users the number of weigh tags received from quarantined harvests.<br>This alert is based on the Grower Weigh Tag Inquiry - Grower Weigh Tag Inquiry program (P31B86).<br>When you click the alert, the system displays the Grower Weigh Tag Inquiry form. The following form layouts are available:<br>• Weigh Tags<br>• Weigh Tag Operation Details (Release 9.2 Update)<br>The following grid formats are available:<br>• Basic<br>• Simple |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Field Manager Guidance page:

| Component Title | Description |
|---|---|
| Crop Estimates Trend (P40G21X\|W40G21XA) | Use this chart to review the crop estimate trend.<br><br>This chart is based on the Frozen Estimate Inquiry - Frozen Estimates Inquiry program (P40G22).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select from these options:<br><br>• Block Name<br>• Appellation<br>• Supplier Number |
| Test Results (P37902X\|W37902XB) | Use this chart to review the test result values recorded for various dates. The advanced query restricts this chart to test results from one test ID. The test value for that test ID must be numeric.<br><br>This chart is based on the Test Results Inquiry - Test Results Inquiry program (P37902). |
| Weigh Tags from Quarantine (P31B85JX\|W31B85JXB) | Use this chart to review the number of weigh tags received from the quarantined harvests.<br><br>This chart is based on the Grower Weigh Tag Inquiry - Grower Weigh Tag Inquiry program (P31B86). |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Field Manager Guidance page:

| Task | Description |
|---|---|
| Harvest Estimate Edit | Use this task to access the Harvest Estimate Edit - Frozen Estimate - Search/Select program (P40G21). |
| Quality Workbench | Use this task to access the Quality Workbench - Harvest Quality Workbench program (P40G25). |
| View Weigh Tags | Use this task to access the View Weigh Tags - View Weigh Tags program (P40G33). |
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvest program (P40G032). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*:

- *Using the Harvest Workbench*

- *Managing Harvest Receipts*
- *Managing Harvest Estimates*
- *Freeze Harvest Estimates*

# 30 Grower Pricing and Payment Roles: Grower Contract Manager (Release 9.2 Update)

## Understanding the Grower Contract Manager UX One Role

The Grower Contract Manager role, and the associated UX One pages and components, enable users to:

- Monitor the status of contracts and the crops that they represent.
- Compare current and planned estimates to anticipate shortfalls in the produce.

The Grower Contract Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Grower Contract Manager role (GRWCONTJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the GRWCONTJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Grower Contract Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Grower Pricing and Payments Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Grower Pricing and Payments.*

# Using the Grower Contract Manager UX One Role

You use the Grower Contract Manager role to access these UX One pages:

- Grower Contract Manager (P40G001X/W40G001XA)
- Grower Contract Manager Amount (P40G001X/W40G001XB)

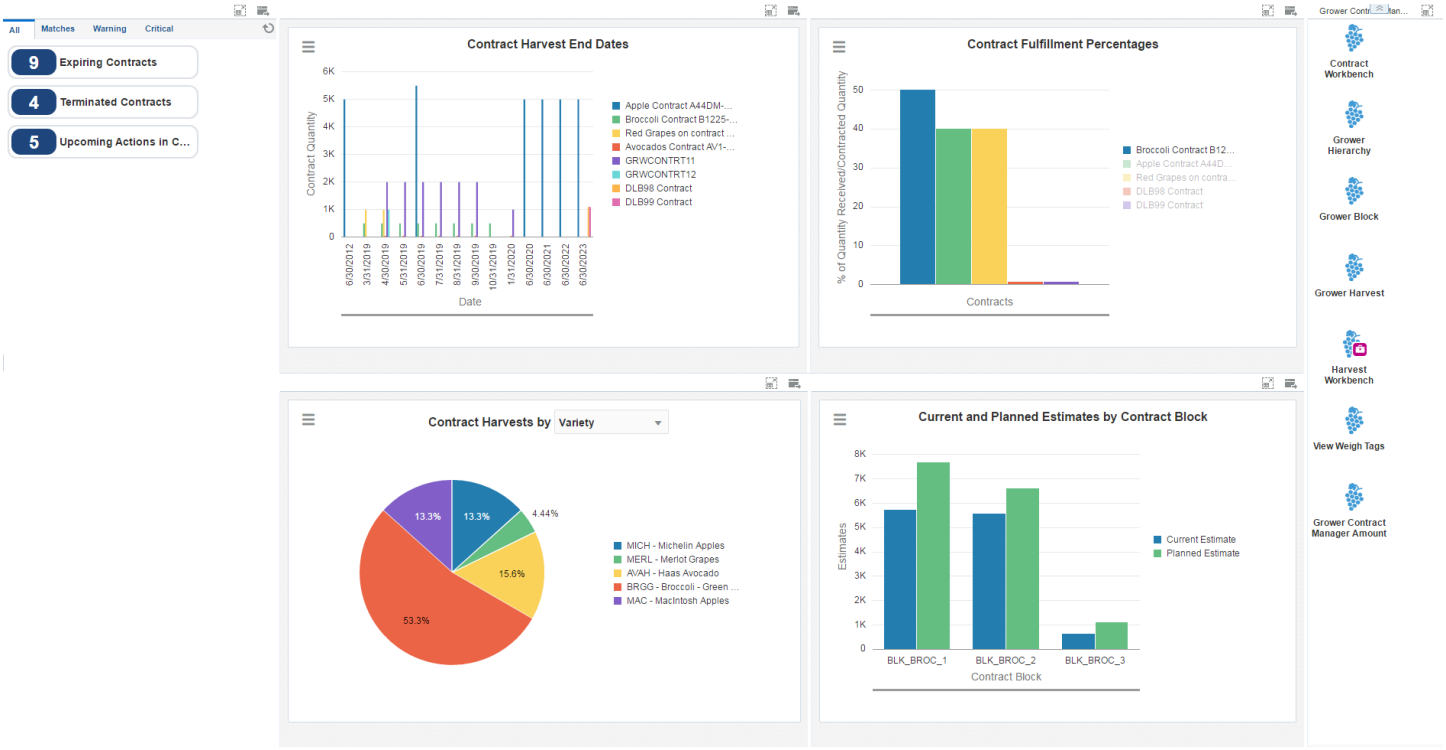
## UX One: Grower Contract Manager Page

The Grower Contract Manager page (P40G001X/W40G001XA) enables users to:

- Receive alerts regarding expiring and terminated contracts, and upcoming actions to be performed in a contract.
- Analyze expiring contracts, current and planned estimates, receipts by supplier, contract harvests, and contracts completion.
- Act quickly by easily accessing the Grower Management programs.

To access the UX One Grower Contract Manager page, log in to the EnterpriseOne system using the Grower Contract Manager role.

This graphic illustrates the Grower Contract Manager page:


All
Matches
Warning
Critical
9
Expiring Contracts
4
Terminated Contracts
5
Upcoming Actions in C...
Contract Harvest End Dates
Contract Quantity
Date
Apple Contract A44DM-...
Broccoli Contract B1225-...
Red Grapes on contract ...
Avocados Contract AV1-...
GRWCONTRT11
GRWCONTRT12
DLB98 Contract
DLB99 Contract
Contract Fulfillment Percentages
% of Quantity Received/Contracted Quantity
Contracts
Broccoli Contract B12...
Apple Contract A44D...
Red Grapes on contra...
DLB98 Contract
DLB99 Contract
Contract Harvests by
Variety
13.3%
13.3%
4.44%
15.6%
53.3%
MICH - Michelin Apples
MERL - Merlot Grapes
AVAH - Haas Avocado
BRGG - Broccoli - Green ...
MAC - MacIntosh Apples
Current and Planned Estimates by Contract Block
Estimates
Contract Block
BLK_BROC_1
BLK_BROC_2
BLK_BROC_3
Current Estimate
Planned Estimate
Contract Workbench
Grower Hierarchy
Grower Block
Grower Harvest
Harvest Workbench
View Weigh Tags
Grower Contract Manager Amount

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Grower Contract Manager page:

| Watchlist Alert | Description |
|---|---|
| Expiring Contracts | This alert tells users the number of contracts that are about to expire.<br>This alert is based on the Contract Header Inquiry program (P43C02).<br>When you click the alert, the system displays the Contract Header form. The following form layout is available:<br>• Contract Header<br>The following grid formats are available:<br>• Basic<br>• Simple |
| Terminated Contracts | This alert tells users the number of contracts that have expired.<br>This alert is based on the Contract Header Inquiry program (P43C02).<br>When you click the alert, the system displays the Contract Header Inquiry form. The following form layout is available:<br>• Contract Header<br>The following grid formats are available:<br>• Basic<br>• Simple |
| Upcoming Actions in Contracts | This alert tells users the number of action date items that are associated with contracts.<br>This alert is based on the Contract Action Dates Inquiry program (P43C050).<br>When you click the alert, the system displays the Contract Action Dates Inquiry form.<br>The following grid format is available:<br>• Basic |

For additional information about the programs associated with these watchlist alerts, see *Inquiry Programs for Grower Contract Management*.

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Grower Contract Manager page:

| Component Title | Description |
|---|---|
| Contract Harvest End Dates (P43C11BX/W43C11BXA) | Use this chart to compare contracted quantities by harvest end date for selected contracts.<br><br>This chart is based on the Contract Elements Inquiry program (P43C120). |
| Contracts Fulfillment Percentages (P40G200X/W40G200XA) | Use this chart to review how close a contract is, by percentage, to complete fulfillment.<br><br>This chart is based on is the Contract Receipts Inquiry program (P40G210). |
| Current and Planned Estimates by Contract Block (P43C11AX/W43C11AXA) | Use this chart to review the current and planned estimates for various contract blocks.<br><br>This chart is based on the Contract Details Inquiry program (P43C130). |
| Contract Harvests by (P43C11AX/W43C11AXB) | Use this chart to review the contract harvests by percentage.<br><br>This chart is based on the Contract Details Inquiry program (P43C130).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select from these options:<br><br>• Origin<br>• Variety |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Grower Contract Manager page:

| Task | Description |
|---|---|
| Contract Workbench | Use this task to access the Contract Workbench - Contract Search program (P43C00). |
| Grower Hierarchy | Use this task to access the Grower Hierarchy - Grower Hierarchy program (P40G0400). |
| Grower Block | Use this task to access the Grower Block - Search for Grower Blocks program (P40G02). |
| Grower Harvest | Use this task to access the Grower Harvest - Search for Grower Harvests program (P40G03). |
| Harvest Workbench | Use this task to access the Harvest Workbench - Manage Harvests program (P40G032). |
| View Weigh Tags | Use this task to access the View Weigh Tags - View Weigh Tags program (P40G33). |

| Task | Description |
| --- | --- |
| Grower Contract Manager Amount | Use this task to access the Grower Contract Manager Amount page (P40G001X/W40G001XB). |

For additional information about the programs accessed by these tasks, see these topics:

- *Setting Processing Options for Contract Workbench (P43C00)* in the *JD Edwards EnterpriseOne Applications Grower Pricing and Payments Implementation Guide*
- *Setting Processing Options for the Grower Hierarchy Program (40G0400)* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*
- *Setting Processing Options for Grower Block Maintenance (P40G02)* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*
- *Setting Processing Options for Grower Harvest Maintenance (P40G03)* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*
- *Setting Processing Options for Harvest Workbench (P40G032)* in the *JD Edwards EnterpriseOne Applications Grower Management Implementation Guide*

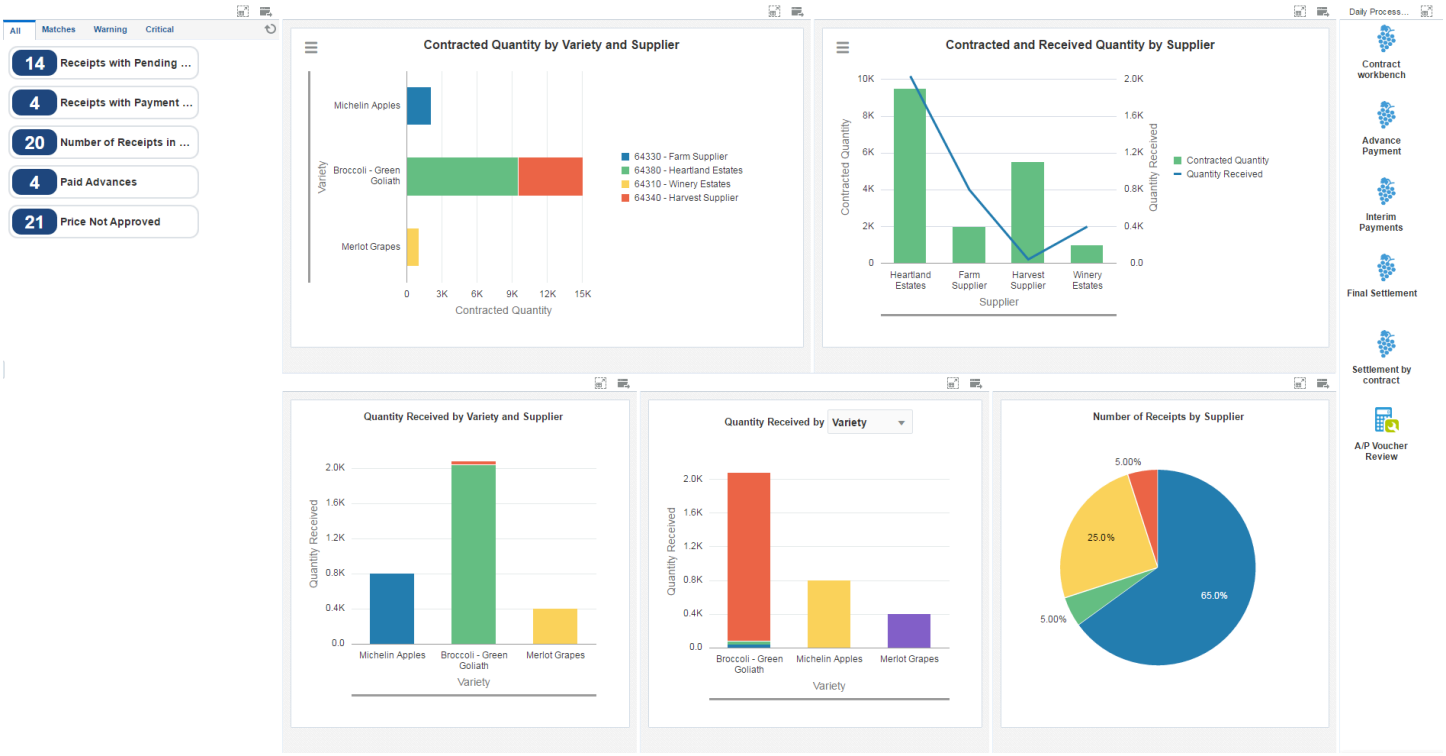
# UX One: Grower Contract Manager Amount Page

The Grower Contract Manager Amount page (P40G001X/W40G001XB) enables users to:

- Receive alerts regarding receipts with pending payments receipts with completed payments, and advance amounts paid.
- Analyze the contracted and received quantity by supplier, contracted quantity by variety and supplier, and quantity received by variety and supplier.
- Act quickly by easily accessing the Grower Pricing and Payments programs.

To access the UX One Grower Contract Manager Amount page, log in to the EnterpriseOne system using the Grower Contract Manager role. When you log in with this role, the system automatically displays the Grower Contract Manager page. Click the Grower Contract Manager Amount task on the springboard to access the Grower Contract Manager Amount page.

This graphic illustrates the Grower Contract Manager Amount page:


All
Matches
Warning
Critical
14 Receipts with Pending ...
4 Receipts with Payment ...
20 Number of Receipts in ...
4 Paid Advances
21 Price Not Approved
Contracted Quantity by Variety and Supplier
Michelin Apples
Broccoli - Green Goliath
Merlot Grapes
Variety
0
3K
6K
9K
12K
15K
Contracted Quantity
64330 - Farm Supplier
64380 - Heartland Estates
64310 - Winery Estates
64340 - Harvest Supplier
Contracted and Received Quantity by Supplier
Contracted Quantity
Quantity Received
Heartland Estates
Farm Supplier
Harvest Supplier
Winery Estates
Supplier
Daily Process...
Contract workbench
Advance Payment
Interim Payments
Final Settlement
Settlement by contract
A/P Voucher Review
Quantity Received by Variety and Supplier
Michelin Apples
Broccoli - Green Goliath
Merlot Grapes
Variety
Quantity Received by Variety
Number of Receipts by Supplier
5.00%
25.0%
65.0%
5.00%

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Grower Contract Manager Amount page:

| Watchlist Alert | Description |
|---|---|
| Receipts with Pending Payments | This alert tells users the number of receipts for which payment is pending.<br><br>This alert is based on the Contract Receipts Inquiry program (P40G210).<br><br>When you click the alert, the system displays the Contract Receipts Inquiry form. The following grid format is available:<br><br>• Basic<br>• Simple |
| Receipts with Payment Complete | This alert tells users the number of receipts in contracts that are fully paid.<br><br>This alert is based on the Contract Receipts Inquiry program (P40G210).<br><br>When you click the alert, the system displays the Contract Receipts Inquiry form. The following grid format is available:<br><br>• Basic<br>• Simple |
| Number of Receipts in Contracts | This alert tells users the number of receipts available in various contracts.<br><br>This alert is based on the Contract Receipts Inquiry program (P40G210).<br><br>When you click the alert, the system displays the Contract Receipts Inquiry form. The following grid format is available:<br><br>• Basic<br>• Simple |
| Paid Advances | This alert tells users the number of contracts for which an advance amount has been paid.<br><br>This alert is based on the Advance Payments Inquiry program (P40G110).<br><br>When you click the alert, the system displays the Advance Payments Inquiry form. The following grid format is available:<br><br>• Basic |
| Price Not Approved | This alert tells users the number of contracts for which the associated price is not approved.<br><br>This alert is based on the Contract Elements Inquiry program (P43G120).<br><br>When you click the alert, the system displays the Edit Contract Harvest form. The following form layout is available: |

| Watchlist Alert | Description |
|---|---|
| | • Contract Harvest<br>The following grid format is available:<br>• Basic<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see *Inquiry Programs for Grower Contract Management*.

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Grower Contract Manager Amount page:

| Component Title | Description |
|---|---|
| Contracted Quantity by Variety and Supplier (P40G200X/W40G200XD) | Use this chart to review the contracted quantity for different varieties by supplier.<br>This chart is based on the Contract Receipts Inquiry program (P40G210). |
| Contracted and Received Quantity by Supplier (P40G200X/W40G200XC) | Use this chart to compare the contracted quantity with the quantity received by supplier.<br>This chart is based on the Contract Receipts Inquiry program (P40G210). |
| Quantity Received by Variety and Supplier (P40G200X/W40G200XE) | Use this chart to review the quantity received for different varieties by suppliers.<br>This chart is based on the Contract Receipts Inquiry program (P40G210). |
| Quantity Received by (P40G200X/W40G200XF) | Use this chart to review the quantity received by percentage.<br>This chart is based on the Contract Receipts Inquiry program (P40G210).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select:<br>• Supplier<br>Use this chart to review the quantity received by supplier.<br>• Variety<br>Use this chart to review the quantity received for different varieties. |
| Number of Receipts by Supplier (P40G200X/W40G200XB) | Use this chart to compare the percentage of weigh tags received by supplier.<br>This chart is based on the Contract Receipts Inquiry program (P40G210). |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Grower Contract Manager Amount page:

| Task | Description |
|---|---|
| Contract Workbench | Use this task to access the Contract Workbench - Contract Search program (P43C00). |
| Advance Payment | Use this task to access the Advance Payment - Advance Payment Search program (P40G100). |
| Interim Payment | Use this task to access the Interim Payment - Receipt Price Review program (P40G200). |
| Final Settlement | Use this task to access the Final Settlement - Settlement By Harvest Block program (P40G300). |
| Settlement by Contract | Use this task to access the Settlement by Contract - Receipt Price Review program (P40G310). |
| A/P Voucher Review | Use this task to access the A/P Voucher Review - Supplier Ledger Inquiry program (P0411). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Grower Pricing and Payments Implementation Guide*:

- *Setting Processing Options for Contract Workbench (P43C00)*
- *Setting Processing Options for Advance Payment (P40G100)*
- *Setting Processing Options for Final Settlement (P40G300)*
- *Setting Processing Options for Settlement by Contract (P40G310)*

# 31 Health and Safety Management Roles: Safety Manager

## Understanding the Safety Manager UX One Role

The Safety Manager role, and the associated UX One pages and components, enable users to receive alerts regarding injuries and illness that have occurred, damage to equipment, and incidents due to environment; analyze incident types, incident costs, incident severity, incident by location, and occupational injuries; and quickly and easily act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Safety Manager role (SFTYMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the SFTYMGRJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Safety Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implemenation Guide* . See *Introduction to JD Edwards EnterpriseOne Health and Safety Incident Management.*

# Using the Safety Manager UX One Role

You use the Safety Manager role to access these UX One pages:

- Safety Manager (P54HS00X|W54HS00XA)
- Safety Manager Reporting (P54HS00X|W54HS00XB)

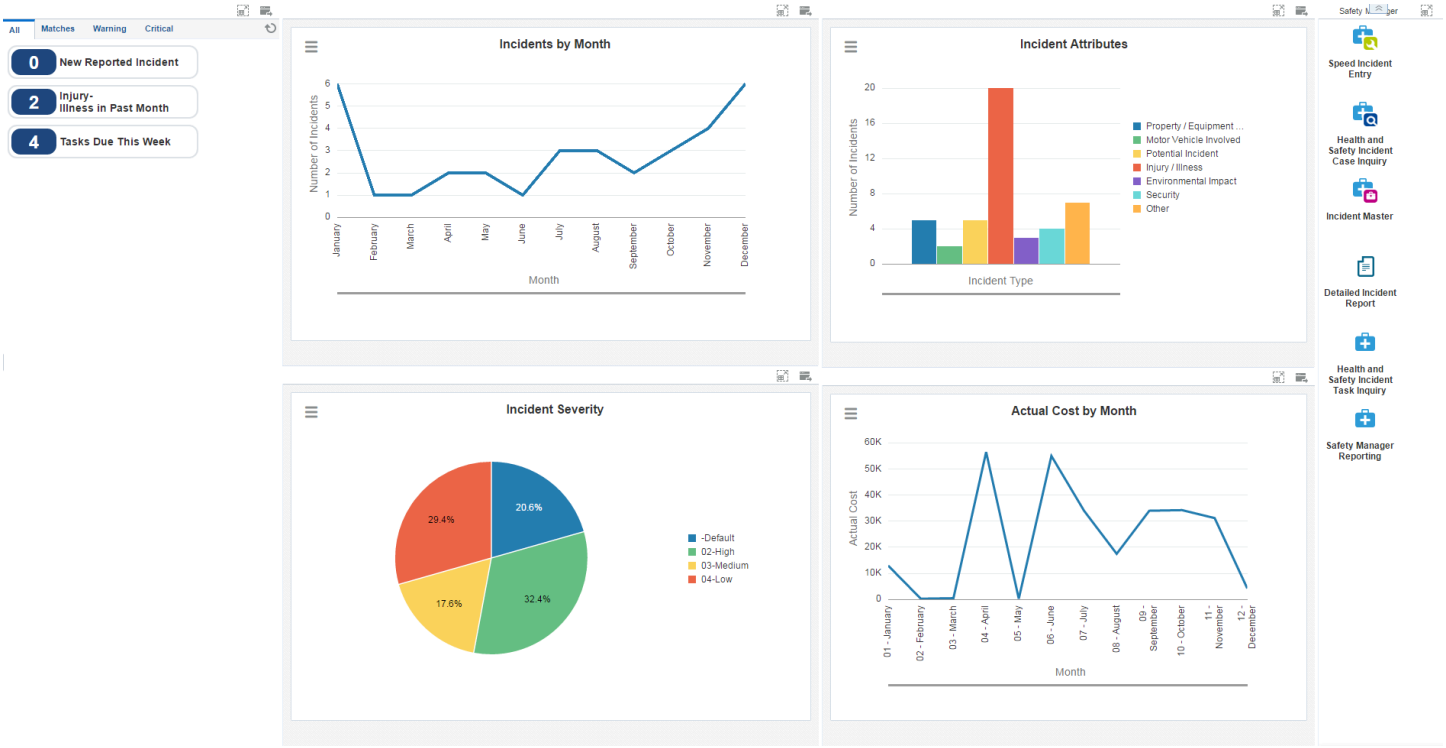
## UX One: Safety Manager Page

The Safety Manager page (P54HS00X|W54HS00XA) enables users to:

- Receive alerts associated with incidents, illness, and new reported incidents.
- Analyze incident types, incident severity, and incident cost.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Safety Manager page, log in to the EnterpriseOne system using the Safety Manager role.

This graphic illustrates the Safety Manager page:


All
Matches
Warning
Critical
0
New Reported Incident
2
Injury-
Illness in Past Month
4
Tasks Due This Week
Incidents by Month
Number of Incidents
Month
January
February
March
April
May
June
July
August
September
October
November
December
Incident Attributes
Number of Incidents
Incident Type
Property / Equipment ...
Motor Vehicle Involved
Potential Incident
Injury / Illness
Environmental Impact
Security
Other
Incident Severity
20.6%
32.4%
17.6%
29.4%
-Default
02-High
03-Medium
04-Low
Actual Cost by Month
Actual Cost
Month
01 - January
02 - February
03 - March
04 - April
05 - May
06 - June
07 - July
08 - August
09 - September
10 - October
11 - November
12 - December
Speed Incident Entry
Health and Safety Incident Case Inquiry
Incident Master
Detailed Incident Report
Health and Safety Incident Task Inquiry
Safety Manager Reporting

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Safety Manager page:

| Watchlist Alert | Description |
|---|---|
| New Reported Incident | This alert tell users about the number of new incidents reported.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br>When you click the alert, the system displays the One View Incident Summary form. The following form layout is available:<br>• Review Incidents<br>The following grid format is available:<br>• Simple |
| Injury/Illness in Past Month | This alert tell users about the number of injuries or illnesses that have occurred in the past month.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br>• Review Incidents<br>The following grid format is available:<br>• SimpleMonthYear |
| Tasks Due This Week | This alert tell users about the tasks that are due the next week.<br>This alert is based on the Incident Task Inquiry program (P54HS215).<br>When you click the alert, the system displays the Incident Task Inquiry form. The following form layout is available:<br>• Tasks to Incident<br>The following grid format is available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *One view Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Setting Processing Options for the Task Inquiry Program (P54HS215)* in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implemenation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Safety Manager page:

| Component Title | Description |
|---|---|
| Incidents by Month (P54HS22X\|W54HS22XA) | Use this chart to view the number of incidents that occurred by month.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Incident Attributes (P54HS22X\|W54HS22XD) | Use this chart to view the number of incidents that occurred for each incident attributes.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Incident Severity (P54HS22X\|W54HS22XC) | Use this chart to view the incident percentage by incident severity.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Actual Cost by Month (P54HS22X\|W54HS22XB) | Use this chart to view the actual cost incurred for all incidents by month.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |

For additional information about the programs associated with these charts, see *One view Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These icons are included in a springboard on the page.

This table lists and describes the tasks on the Safety Manager page:

| Task | Description |
|---|---|
| Speed Incident Entry | Use this task to access the Speed Incident Entry - Report an Incident program (P54HS30). |
| Health and Safety Incident Case Inquiry | Use this task to access the Health and Safety Incident Case Inquiry - Incident Case Inquiry program (P54HS210). |
| Incident Master | Use this task to access the Incident Master - Manage Incidents program (P54HS00).<br><br>The following grid format is available:<br><br>• Simple |
| Detailed Incident Report | Use this task to access the Detailed Incident Report program (R54HS400).<br><br>Use this icon to access a list of available versions. |

| Task | Description |
|---|---|
| Health and Safety Incident Task Inquiry | Use this task to access the Health and Safety Incident Task Inquiry - Incident Task Inquiry program (P54HS215).<br>The following form layout is available:<br>• Tasks to Incident<br>The following grid format is available:<br>• SimpleTaskDetail |
| Safety Manager Reporting | Use this task to access the Safety Manager Reporting page (P54HS00X\|W54HS00XB). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide*:

- *Entering Incidents Using the Report an Incident Program (P54HS30)*
- *Setting Processing Options for the Case Inquiry Program (P54HS210)*
- *Setting Processing Options for the Incident Master Program (P54HS00)*
- *Setting Processing Options for Detailed Incident Report (R54HS400)*
- *Setting Processing Options for the Task Inquiry Program (P54HS215)*

# UX One: Safety Manager Reporting Page

The Safety Manager Reporting page (P54HS00X|W54HS00XB) enables users to:

- Receive alerts associated with environmental incidents, OSHA cases opened this week, and equipment damage.
- Analyze the number of reportable cases and occupational injuries.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Safety Manager Reporting page, log in to the EnterpriseOne system using the Safety Manager role. When you log in with this role, the system automatically displays the Safety Manager page. Click the Safety Manager Reporting task on the springboard to access the Safety Manager Reporting page.

This graphic illustrates the Safety Manager Reporting page:

All
Matches
Warning
Critical
2
OSHA Cases Opened This Week
27
YTD Incidents
2
Equipment Damaged in Past Month
2
Environmental Incidents in Past Month
Number of Reportable Cases
Reportable Cases
35
30
25
20
15
10
5
0
Organizational Unit
1500 -
2000 -
Occupational Injuries by Injury Classification
Number of Cases
15
12
9
6
3
0
Other Recordable Injury
Default
First Aid
Restricted Work
Days Away From Work
Injury Classification
Skin Disorder
Injury
Respiratory Condition
All Other Illnesses
Detailed Incident Report
OSHA 300 Log
OSHA 300A Summary
OSHA - Form 301
BLS Survey

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Safety Manager Reporting page:

| Watchlist Alert | Description |
|---|---|
| OSHA Cases Opened This Week | This alert tell users about the number of OSHA cases opened in the current week.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS230).<br>When you click the alert, the system displays the One View Incident People Inquiry form.<br>The following grid format is available:<br>• Simple |
| YTD Incidents | This alert tell users about the number of incidents that occurred in the current year.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br>• Review Incidents<br>The following grid format is available:<br>• Simple |
| Equipment Damaged in Past Month | This alert tell users how many pieces of equipment were damaged in the past month.<br>This alert is based on the One View Incident Equipment Inquiry program (P54HS240).<br>When you click the alert, the system displays the One View Incident Equipment Inquiry form.<br>The following grid format is available:<br>• Simple |
| Environmental Incidents in Past Month | This alert tell users about the number of environmental incidents that occurred in the past month.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS250).<br>When you click the alert, the system displays the One View Environmental Incident Inquiry form.<br>The following grid format is available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting Guide*:

- *One View Incident Summary Inquiry (P54HS220)*

- *One View Incident Equipment Inquiry (P54HS240)*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Safety Manager Reporting page:

| Component Title | Description |
|---|---|
| Number of Reportable Cases | Use this chart to view the number of reportable cases by organizational units.<br><br>This chart is based on the One View Safety Statistics Inquiry program (P54HS260).<br><br>**Note:** You must specify Default Safety Hours Group processing option for the application to render the chart. |
| Occupational Injuries by Injury Classification | Use this chart to view the number of cases by injury classification.<br><br>This chart is based on the One View Incident People Inquiry program (P54HS230). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Safety Statistics Inquiry (P54HS260)*
- *One View Incident People Inquiry (P54HS230)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Safety Manager Reporting page:

| Task | Description |
|---|---|
| One View Incident Summary Inquiry | Use this task to access the Detailed Incident Report (R54HS400).<br><br>Use this task to access a list of available versions. |
| OSHA 300 Log | Use this task to access the OSHA - Form 300 Log of Work-Related Injuries and Illnesses program (R54HS300).<br><br>Use this task to access a list of available versions. |
| OSHA 300A Summary | Use this task to access the OSHA 300A - Summary of Work-Related Injuries and Illnesses program (R54HS300A).<br><br>Use this task to access a list of available versions. |
| OSHA - Form 301 | Use this task to access the OSHA - Form 301 Illness Incident Report program (R54HS301). |

| Task | Description |
| --- | --- |
| | Use this task to access a list of available versions. |
| BLS Survey | Use this task to access the BLS Survey of Occupational Injuries and Illnesses program (R54HS320).<br><br>Use this task to access a list of available versions. |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide*:

- *Setting Processing Options for Detailed Incident Report (R54HS400)*
- *Setting Processing Options for OSHA 30 Log Report (R54HS300)*
- *Setting Processing Options for OSHA 300A Summary Report (R54HS300A)*
- *Setting Processing Options for OSHA 301 Injury/Illness Report (R554HS301)*
- *Setting Processing Options for the BLS Survey Report (R54HS320)*

# 32 Homebuilder Management Roles: Lot Start Manager

## Understanding the Lot Start Manager UX One Role

The Lot Start Manager role, and the associated UX One pages and components, enable users to:

- Receive alerts that affect home construction planning.
- Analyze financial status of all homes under construction.
- Easily access sales and preconstruction details of all homes.

The Lot Start Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Lot Start Manager role (LOTSMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the LOTSMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Lot Start Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Homebuilder Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Homebuilder Management.*

# Using the Lot Start Manager UX One Role

You use the Lot Start Manager role to access the UX One Lot Start Manager (P44H001X|W44H001XA) page.

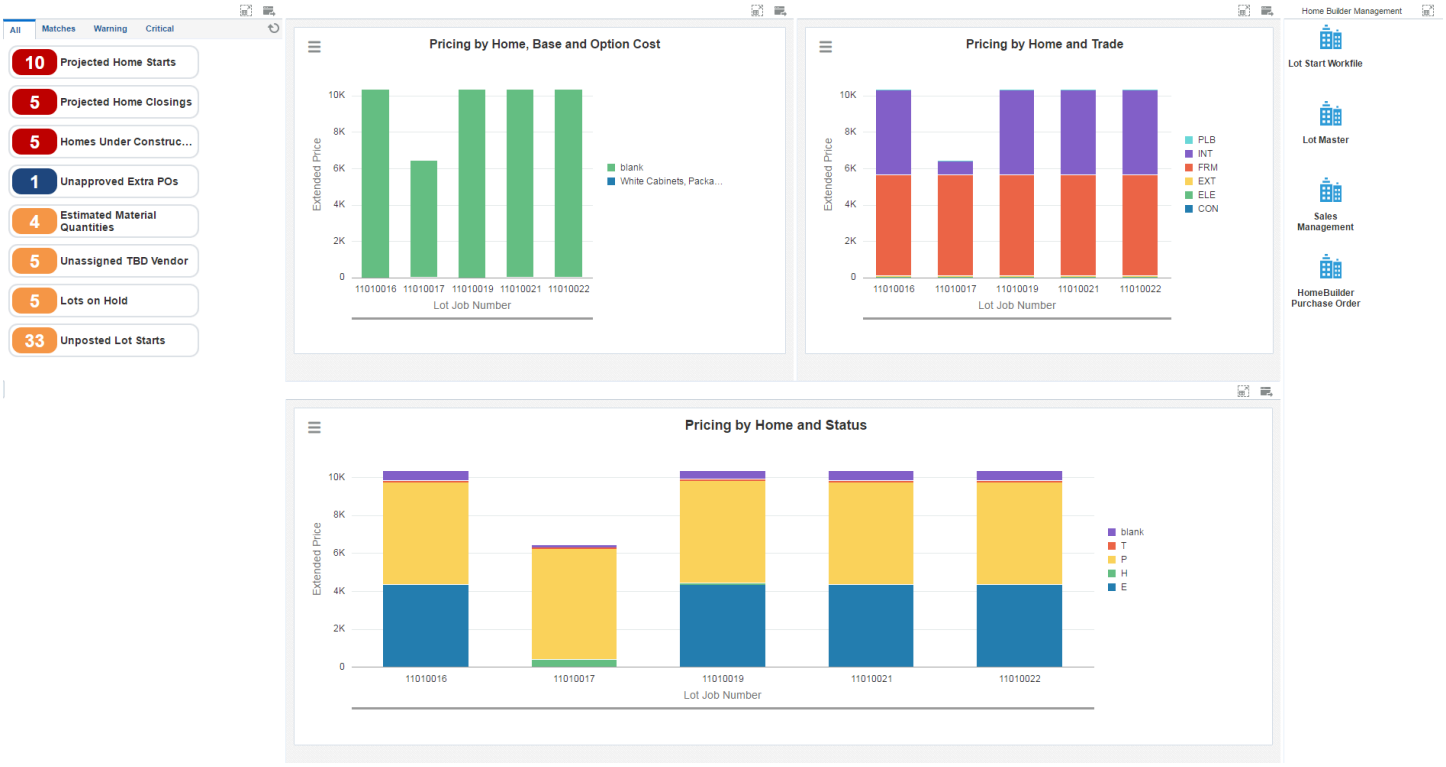
## UX One: Lot Start Manager Page

The Lot Start Manager page (P44H001X|W44H001XA) enables users to:

- Receive alerts regarding the number of homes that are currently under construction, about to start or close, and unassigned vendors.
- Analyze extended price for homes based on the commitment job status, category code, and option cost.
- Easily access various homebuilder management programs.

To access the UX One Lot Start Manager page, log in to the EnterpriseOne system using the Lot Start Manager role.

This graphic illustrates the Lot Start Manager page.


All
Matches
Warning
Critical
10 Projected Home Starts
5 Projected Home Closings
5 Homes Under Construc...
1 Unapproved Extra POs
4 Estimated Material Quantities
5 Unassigned TBD Vendor
5 Lots on Hold
33 Unposted Lot Starts
Pricing by Home, Base and Option Cost
Extended Price
Lot Job Number
blank
White Cabinets, Packa...
Pricing by Home and Trade
PLB
INT
FRM
EXT
ELE
CON
Pricing by Home and Status
blank
T
P
H
E
11010016
11010017
11010019
11010021
11010022
Home Builder Management
Lot Start Workfile
Lot Master
Sales Management
HomeBuilder Purchase Order

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Lot Start Manager page:

| Watchlist Alert | Description |
|---|---|
| Projected Home Starts | This alert tells users about the number of homes that are planned for construction.<br><br>This alert is based on the Work With Lot Master program (P44H201).<br><br>When you click the alert, the system displays the Work with Lot Master form. The following form layout is available:<br><br>• Lot Master |
| Projected Home Closings | This alert tells users about the number of homes planned to close.<br><br>This alert is based on the Sales Workbench program (P44H500).<br><br>When you click the alert, the system displays the Sales Workbench form. The following form layout is available:<br><br>• Sales Management |
| Homes Under Construction | This alert tells users about the number of homes that are currently under construction.<br><br>This alert is based on the Sales Workbench program (P44H500).<br><br>When you click the alert, the system displays the Sales Workbench form. The following form layout is available:<br><br>• Sales Management |
| Unapproved Extra POs | This alert tells users about any unapproved extra POs.<br><br>This alert is based on the Work With After Start Purchasing program (P44H703). |
| Estimated Material Quantities | This alert tells users about the number of items that are posted as estimated.<br><br>This alert is based on the Work With Lot Start Workfile program (P44H711). |
| Unassigned TBD Vendor | This alert tells users about the number of vendors that have not been assigned.<br><br>This alert is based on the Work with Lot Start Workfile program (P44H711). |
| Lots On Hold | This alert tells users about any Lot Start workfile transactions that are currently on hold.<br><br>This alert is based on the Work with Lot Start Workfile program (P44H711). |
| Unposted Lot Starts | This alert tells users about any Lot Start workfile transactions that are not posted. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Work with Lot Start Workfile program (P44H711). |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Homebuilder Management Implementation Guide*:

- *Understanding the Sales Workbench Program*
- *Setting Processing Options for Lot Start Workfile Review*
- *Setting Processing Options for Lot Master*
- *Setting Processing Options for Extra Purchase Order Entry*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Lot Start Manager page:

| Component Title | Description |
|---|---|
| Pricing by Home and Status (P44H711X\|W44H711XB) | Use this chart to view the extended price for different lot job numbers. To categorize the lot job numbers by commitment job status, the system displays each commitment job status in the chart in different colors.<br><br>This chart is based on the Work with Lot Start Workfile program (P44H711). |
| Pricing By Home and Trade (P44H711X\|W44H711XC) | Use this chart to view the extended price for different lot job numbers categorized by category code. To categorize the lot job numbers by category code, the system displays each category code in the chart in different colors.<br><br>This chart is based on the Work with Lot Start Workfile program (P44H711). |
| Pricing by Home, Base and Option Cost (P44H711X\|W44H711XA) | Use this chart to view the extended price for different lot job numbers categorized by option cost. To categorize the lot job numbers by option cost, the system displays each option in the chart in different colors.<br><br>This chart is based on the Work with Lot Start Workfile program (P44H711). |

For additional information about the programs associated with these charts, see *Setting Processing Options for Lot Start Workfile Review* in the *JD Edwards EnterpriseOne Applications Homebuilder Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Lot Start Manager:

| Task | Description |
|---|---|
| Lot Start Workfile | Use this task to access the Lot Start Workfile - Work with Lot Start Workfile program (P44H711). |
| Lot Master | Use this task to access the Lot Master - Work with Lot Master program (P44H201).<br>The following form layout is available:<br>• Lot Master |
| Sales Management | Use this task to access the Sales Management - Sales Workbench program (P44H500).<br>The following form layout is available:<br>• Sales Management |
| HomeBuilder Purchase Order | Use this task to access the HomeBuilder Purchase Order - Work with After Start Purchase program (P44H703). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Homebuilder Management Implementation Guide*:

- *Setting Processing Options for Lot Start Workfile Review*
- *Setting Processing Options for Lot Master*
- *Understanding the Sales Workbench Program*
- *Setting Processing Options for Extra Purchase Order Entry*

# 33 Human Capital Management Roles: Human Resources Manager (Release 9.2 Update)

## Understanding the Human Resources Manager UX One Role

The Human Resources Manager role, and the associated UX One page and components, enable users to receive alerts, analyze data, and access related programs to enable them to take action, if required.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Human Resources Manager (HRMGRJDE) role, and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the HRMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Human Resources Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Human Resources Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Human Resources*.

## Using the Human Resources Manager UX One Role

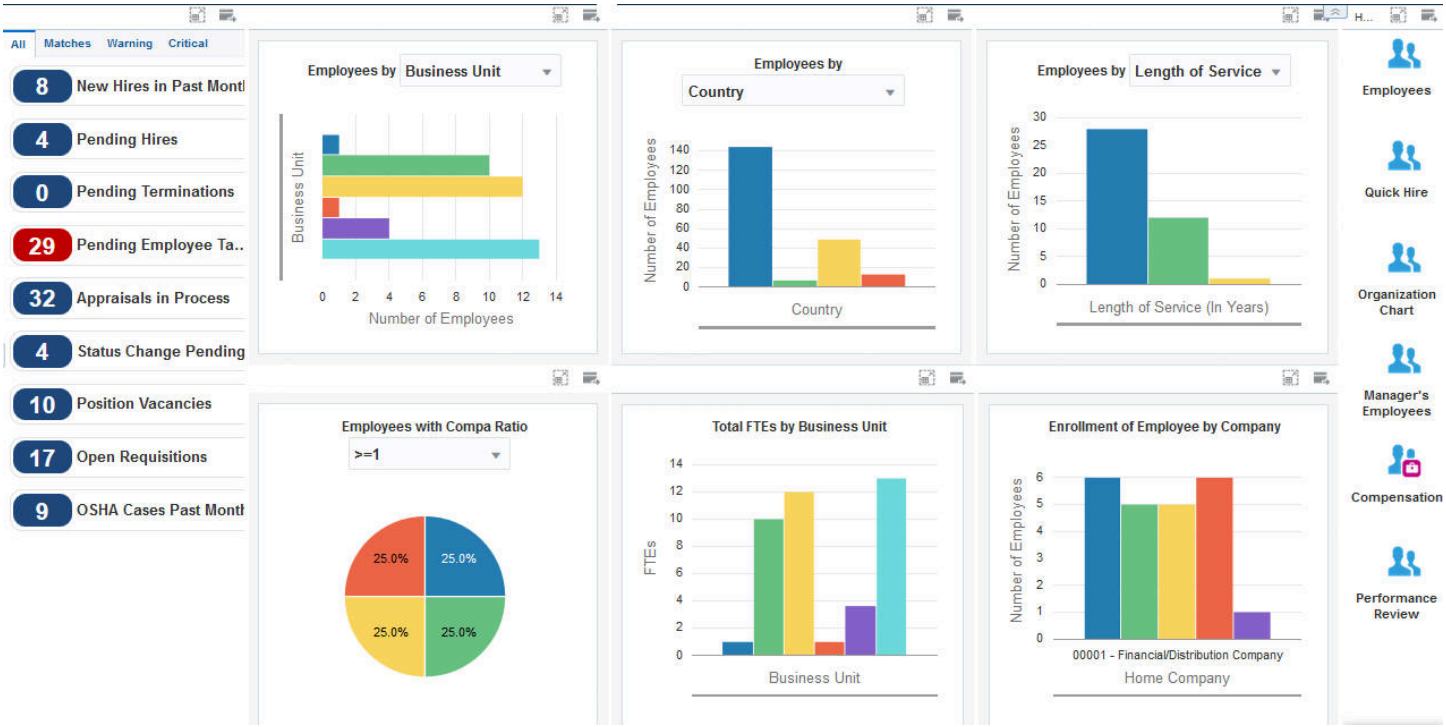
You use the Human Resources Manager role to access the HR Manager UX One page (P08001X|W08001XA).

# UX One: HR Manager Page

The HR Manager page (P08001X|W08001XA) enables users to receive alerts and analyze data related to employees, and access applications that you use frequently to manage employees.

To access the UX One HR Manager page, log in to the EnterpriseOne system using the Human Resources Manager role.

This graphic illustrates the HR Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs and business views. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a

different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the HR Manager page:

| Watchlist Alert | Description |
|---|---|
| New Hires in Past Month | This alert displays the number of employees hired in the past month.<br><br>This alert is based on the Employee Master program (P0801). When you click this alert, the system displays the Work With Employee Information form.<br><br>The following grid format is available:<br><br>• Simple |
| Pending Hires | This alert displays the number of new hires whose information is yet to be processed and updated in the Employee Master Information table (F060116).<br><br>This alert is based on the Employee Work File Revisions program (P060116P). When you click this alert, the system displays the Work With Pending Employees form. |
| Pending Terminations | This alert displays the number of employees whose terminations are pending.<br><br>This alert is based on the Employee Master program (P0801). When you click this alert, the system displays the Work With Employee Information form. The following form layout is available:<br><br>• Employee<br>The following grid format is available:<br><br>• Simple |
| Pending Employee Tasks | This alert displays the number of employees for whom the setup tasks are pending.<br><br>This alert is based on the Employee Setup Workbench program (P08710). When you click this alert, the system displays the Work With Employee Setup form.<br><br>The following form layout is available:<br><br>• Employee Master Org Assignment |
| Appraisals in Process | This alert displays the number of employees whose performance appraisals are in process.<br><br>This alert is based on the Employee Performance Appraisals program (P087712, version ZJDE0006). When you click this alert, the system displays the Supervisor Work With Performance Appraisals form. The following form layout is available:<br><br>• Diary<br>The following grid format is available:<br><br>• Simple |
| Status Change Pending | This alert displays the number of employees whose status change requests are pending approval.<br><br>This alert is based on the Status Change Review program (P087201). When you click this alert, the system displays the Work With Pending Approvals form. |

| Watchlist Alert | Description |
|---|---|
| Position Vacancies | This alert displays the number of vacancies for a position.<br><br>This alert is based on the Position Master Detail program (P08101). When you click this alert, the system displays the Work With Positions form. The following grid format is available:<br><br>• Simple |
| Open Requisitions | This alert displays the number of requisitions that have been approved but not yet filled.<br><br>This alert is based on the Requisition Information program (P08102). When you click this alert, the system displays the Work With Requisitions form. The following form layout is available:<br><br>• Req Activity<br>The following grid format is available:<br><br>• Simple |
| OSHA Cases Past Month | This alert displays the number of OSHA cases for injury and illness reported in the past month.<br><br>This alert is based on the Injury/Illness Case Information program (P08601). When you click this alert, the system displays the Work With Injury/Illness Cases form. The following form layout is available:<br><br>• Case Info<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Adding Employee Records for Applicants, Rehires, and New Hires* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*
- *Revising New Employee Records* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*
- *Setting Up the Employee Setup Process* in the *JD Edwards EnterpriseOne Applications Human Capital Management Self-Service Implementation Guide*
- *Reviewing a Competency Based Performance Appraisal* in the *JD Edwards EnterpriseOne Applications Human Resources Implementation Guide*
- *Reviewing an Employee Status Change* in the *JD Edwards EnterpriseOne Applications Human Capital Management Self-Service Implementation Guide*
- *Defining Position Budgets Manually* in the *JD Edwards EnterpriseOne Applications Human Resources Implementation Guide*
- *Entering Initial Requisition Information* in the *JD Edwards EnterpriseOne Applications Human Resources Implementation Guide*
- *(USA) Reporting Injury and Illness Information to OSHA* in the *JD Edwards EnterpriseOne Applications Human Resources Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the HR Manager page:

| Component Title | Description |
|---|---|
| Employees by (P080120X\|W080120XA) | Use this chart to view the number of employees for each business unit or EEO job category.<br>This chart is based on the One View Employee Profile Inquiry program (P080120).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Business Unit<br>• EEO Job Category |
| Employees by (P080120X\|W080120XC) | Use this chart to view the number of employees for each country or state/province.<br>This chart is based on the One View Employee Profile Inquiry program (P080120).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Country<br>• Country and State/Province |
| Employees by (P080120X\|W080120XB) | Use this chart to view the number of employees based on their service duration or age range.<br>This chart is based on the One View Employee Profile Inquiry program (P080120).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Length of Service<br>• Age Range |
| Employees with Compa Ratio (P080120X\|W080120XD) | Use this chart to view the percentage of employees based on the compa ratio.<br>This chart is based on the One View Employee Profile Inquiry program (P080120).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• >=1<br>• <1 |
| Total FTEs by Business Unit (P080120X\|W080120XE) | Use this chart to view the number of FTEs (full-time equivalents) for each business unit.<br>This chart is based on the One View Employee Profile Inquiry program (P080120). |
| Enrollment of Employee by Company (P08234X\|W08234XD) | Use this chart to view the number of employees enrolled in each company.<br>This chart is based on the One View Employee Benefits Inquiry program (P08234). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* :

- *One View Employee Profile Inquiry (P080120)*
- *One View Employee Benefits Inquiry (P08234)*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the HR Manager page:

| Task | Description |
|---|---|
| Employees | Use this task to access the Employee Profile program (P060116).<br>The following form layout is available:<br>• Employee Profile and Job<br>The following grid format is available:<br>• Simple |
| Quick Hire | Use this task to access the Employee Work File Revisions program (P060116P). |
| Organization Chart | Use this task to access the Organization Chart.<br>See *Using the Employee Organization Chart* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide* . |
| Manager's Employees | Use this task to access the Managers Workbench program (P08712). |
| Compensation | Use this task to access the Work With Compensation Review Workbench program (P08810). |
| Performance Review | Use this task to access the Employee Performance Appraisals program (P087712, version ZJDE0006).<br>The following form layout is available:<br>• Competencies<br>The following grid format is available:<br>• Simple |

For additional information about the programs accessed by these tasks, see:

- *Reviewing and Revising Employee Information* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*
- *Revising New Employee Records* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*
- *Using the Managers Workbench Program* in the *JD Edwards EnterpriseOne Applications Human Capital Management Self-Service Implementation Guide*

- *Manager Self Service* in the *JD Edwards EnterpriseOne Applications Human Capital Management Self-Service Implementation Guide*
- *Reviewing a Competency Based Performance Appraisal* in the *JD Edwards EnterpriseOne Applications Human Resources Implementation Guide*

# 34 Inventory Management Roles: Inventory Accounting Manager (Release 9.2 Update)

## Understanding the Inventory Accounting Manager UX One Role

The Inventory Accounting Manager role, and the associated UX One pages and components, enable users to:

- Align inventory with market trends, top-level strategies, operational constraints, and customer segments.
- Review items without defined cost or price and monitor inventory to G/L reconciliations.
- Monitor obsolete items across the organization and take appropriate action.

The Inventory Accounting Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Inventory Accounting Manager role (INVACMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the INVACMRJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Inventory Accounting Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Inventory Management.*

# Using the Inventory Accounting Manager UX One Role

You use the Inventory Accounting Manager role to access these UX One pages:

- Inventory Accounting Manager (P41001X/W41001XA)
- Inventory Valuation Analysis (P41001X/W41001XB)
- Inventory Cost Analysis (P41001X/W41001XC)

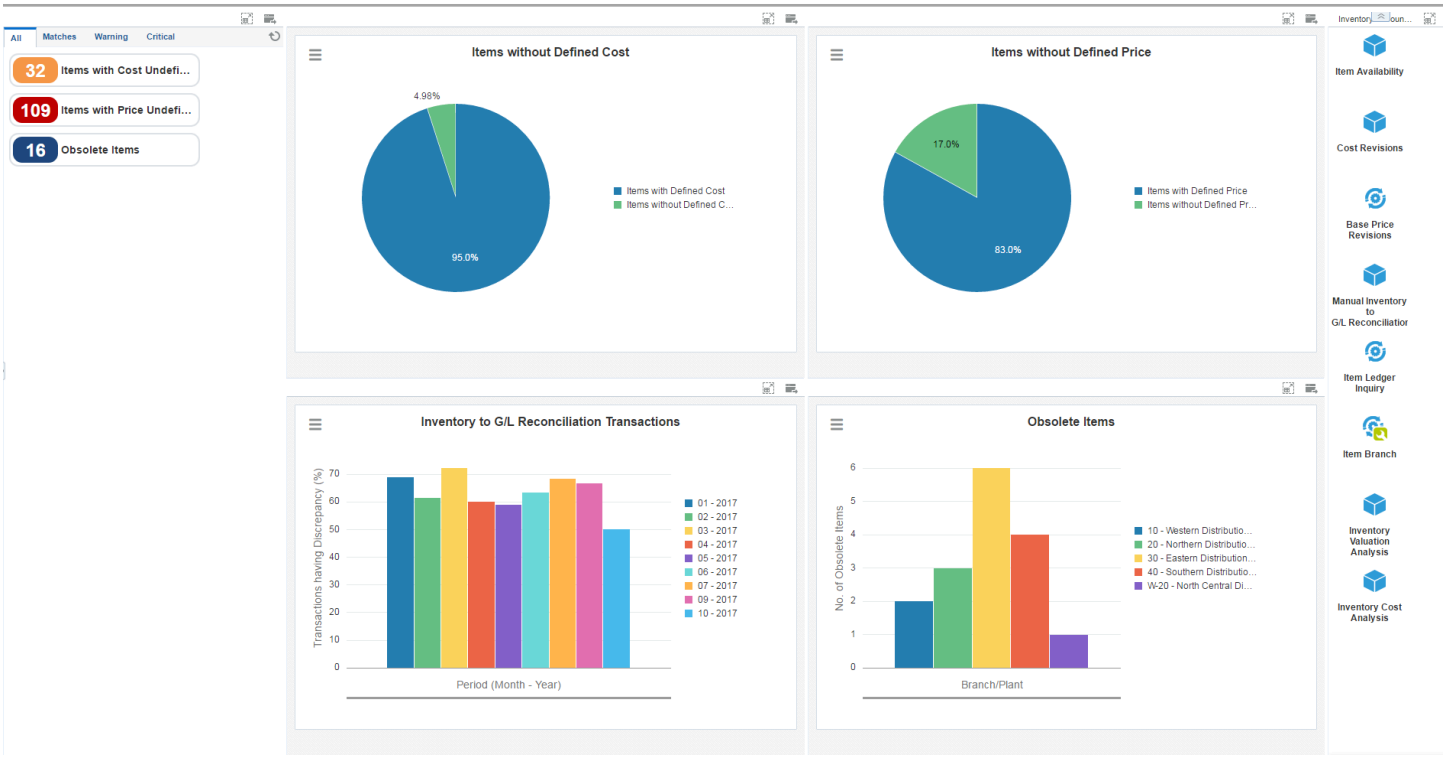
## UX One: Inventory Accounting Manager Page

The Inventory Accounting Manager page (P41001X/W41001XA) enables users to:

- Improve inventory accuracy by handling inventory to G/L reconciliations.
- Effectively manage inventory by identifying obsolete inventory.
- Manage defining cost and price for items for various branch/plants.

To access the UX One Inventory Accounting Manager page, log in to the EnterpriseOne system using the Inventory Accounting Manager role.

This graphic illustrates the Inventory Accounting Manager page.


All
Matches
Warning
Critical
32
Items with Cost Undefi...
109
Items with Price Undefi...
16
Obsolete Items
Items without Defined Cost
4.98%
95.0%
Items with Defined Cost
Items without Defined C...
Items without Defined Price
17.0%
83.0%
Items with Defined Price
Items without Defined Pr...
Inventory to G/L Reconciliation Transactions
Transactions having Discrepancy (%)
Period (Month - Year)
01 - 2017
02 - 2017
03 - 2017
04 - 2017
05 - 2017
06 - 2017
07 - 2017
09 - 2017
10 - 2017
Obsolete Items
No. of Obsolete Items
Branch/Plant
10 - Western Distributio...
20 - Northern Distributio...
30 - Eastern Distribution...
40 - Southern Distributio...
W-20 - North Central Di...
Item Availability
Cost Revisions
Base Price Revisions
Manual Inventory to G/L Reconciliation
Item Ledger Inquiry
Item Branch
Inventory Valuation Analysis
Inventory Cost Analysis

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Inventory Accounting Manager page:

| Watchlist Alert | Description |
|---|---|
| Items with Cost Undefined | This alerts the users about the number of items for which the cost is not defined.<br><br>The alert runs on the P41052 program where the Item Number (Cost File) is not defined. The watchlist considers the item costs defined at the branch level.<br><br>This alert is based on the Item Cost Inquiry program (P41052).<br><br>When you click the alert, the system displays the Item Cost Inquiry form.<br><br>The following grid format is available:<br><br>• Basic |
| Items with Price Undefined | This alerts the users about the number of items for which the price is not defined.<br><br>The alert runs on the P41062 program where the Item Number (Price File) is not defined. The watchlist considers item costs defined at the branch level. It considers the item price for the branch level and does not consider the item group and customer group.<br><br>This alert is based on the Item Price Inquiry program (P41062).<br><br>When you click the alert, the system displays the Item Price Inquiry form.<br><br>The following grid format is available:<br><br>• Basic |
| Obsolete Items | This alerts the users about the number of items that are currently obsolete.<br><br>This alert is based on the Item Branch Inquiry program (P41027).<br><br>When you click the alert, the system displays the Item Branch Inquiry form. The following form layout is available:<br><br>• Item Availability Inquiry<br>The following grid format is available:<br><br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *Setting Processing Options for Cost Revisions (P4105)* in the *JD Edwards EnterpriseOne Applications Bulk Stock Inventory Implementation Guide .*
- *Inquiry Programs for Inventory Management*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Inventory Accounting Manager page:

| Component Title | Description |
|---|---|
| Items without Defined Cost (P4105X/W4105XA) | Use this chart to review the items for which cost is not defined for a particular branch/plant in a company.<br><br>The chart runs on the P41052 program where the Item Number (Cost File) is not defined. The chart consider item costs defined at the branch level.<br><br>This chart is based on the Item Cost Inquiry program (P41052). |
| Items without Defined Price (P41026X/W41026XB) | Use this chart to review the items for which price is not defined for a particular branch/plant in a company.<br><br>The chart runs on the P41062 program where the Item Number (Price File) is not defined. The chart considers item costs defined at the branch level. It considers item price for the branch level and does not consider the item group and customer group.<br><br>This chart is based on the Item Price Inquiry (P41062). |
| Inventory to G/L Reconciliation Transactions (P4111X/W4111XA) | Use this chart to review the percentage of transactions for a specific G/L date range that have variances between the item ledger and general ledger. This chart displays data for a specific company on a monthly basis for a specified G/L date range.<br><br>This chart is based on the Work With Item Ledger program (P4111). |
| Obsolete Items (P41026X/W41026XA) | Use this chart to review the number of items that are currently obsolete across all branch/plants in a company.<br><br>This chart is based on the Item Branch Inquiry program (P41027). |

For additional information about the programs accessed by these charts, see *Setting Processing Options for Item Ledger Inquiry (CARDEX) (P4111)* in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Inventory Accounting Manager page:

| Task | Description |
|---|---|
| Item Availability | Use this task to access the Item Availability - Work With Item Availability program (P41202).<br><br>The following form layout is available:<br><br>• Sales Order Inquiry |

| Task | Description |
|---|---|
| Cost Revisions | Use this task to access the Cost Revisions - Work With Item Cost program (P4105). |
| Base Price Revisions | Use this task to access the Base Price Revisions - Work With Preference Base Price program (P4106). |
| Manual Inventory to G/L Reconciliation | Use this task to access the Manual Inventory to G/L Reconciliation - Manual Inventory to G/L Reconciliation program (P41500). |
| Item Ledger Inquiry | Use this task to access the Item Ledger Inquiry - Work With Item Ledger program (P4111) |
| Item Branch | Use this task to access the Item Branch - Work With Item Branch program (P41026). |
| Inventory Valuation Analysis | Use this task to access the Inventory Valuation Analysis page (P41001X/W41001XB) |
| Inventory Cost Analysis | Use this task to access the Inventory Cost Analysis page (P41001X/W41001XC) |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Cost Revisions (P4105)*
- *Setting Processing Options for Item Branch Plant (P41026)*

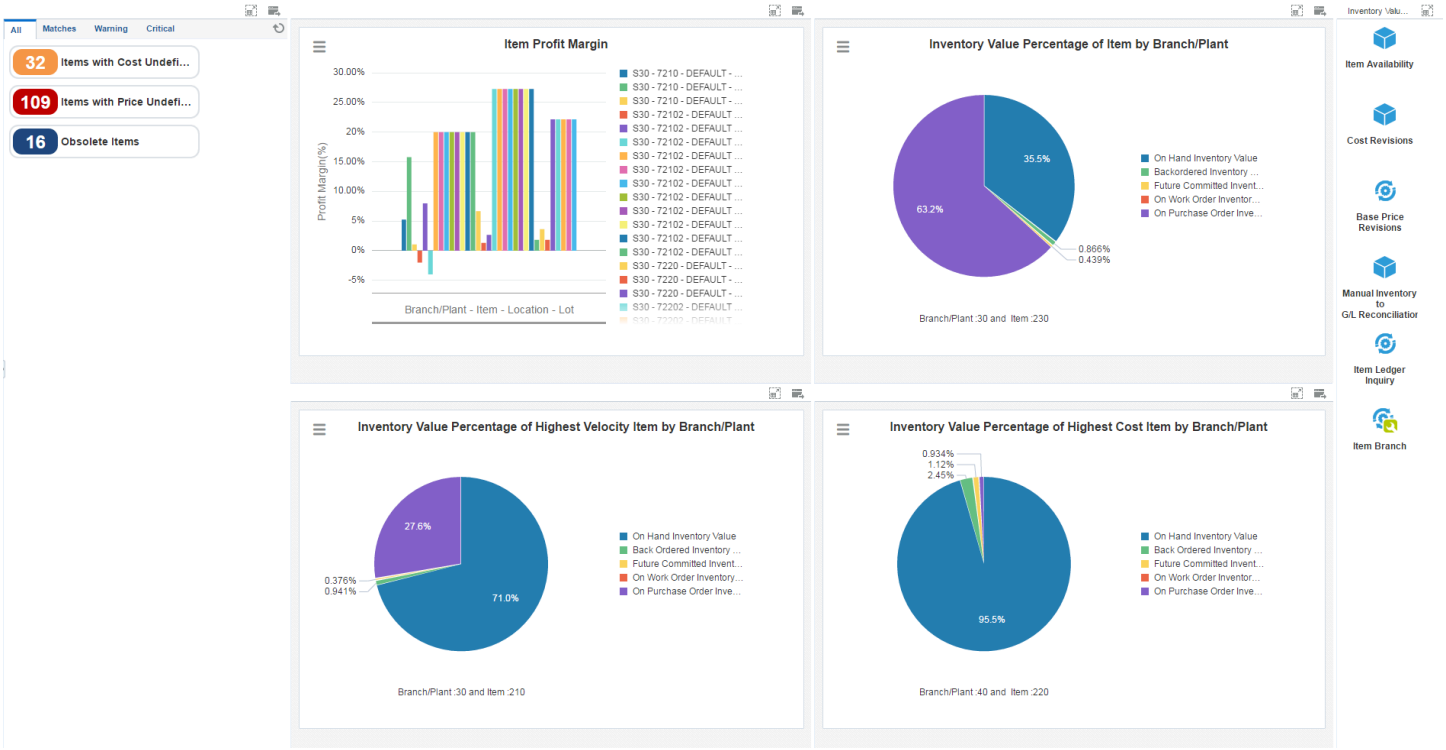
# UX One: Inventory Valuation Analysis Page

The Inventory Valuation Analysis page (P41001X/W41001XB) enables users to:

- Monitor inventory valuation for the most revenue generating inventory to drive critical business.
- Review item profit margins across various branch/plants for market trend analysis.
- Keep track of items to manage inventory expenditure.

To access the UX One Inventory Valuation Analysis page, log in to the EnterpriseOne system using the Inventory Accounting Manager role. When you log in with this role, the system automatically displays the Inventory Accounting Manager page. Click the Inventory Valuation Analysis task on the springboard to access the Inventory Valuation Analysis page.

This graphic illustrates the Inventory Valuation Analysis page.


All
Matches
Warning
Critical
32
Items with Cost Undefi...
109
Items with Price Undefi...
16
Obsolete Items
Item Profit Margin
30.00%
25.00%
20%
15.00%
10.00%
5%
0%
-5%
Profit Margin(%)
Branch/Plant - Item - Location - Lot
Inventory Value Percentage of Item by Branch/Plant
35.5%
63.2%
0.866%
0.439%
On Hand Inventory Value
Backordered Inventory ...
Future Committed Invent...
On Work Order Inventor...
On Purchase Order Inve...
Branch/Plant :30 and Item :230
Inventory Valu...
Item Availability
Cost Revisions
Base Price Revisions
Manual Inventory to G/L Reconciliatior
Item Ledger Inquiry
Item Branch
Inventory Value Percentage of Highest Velocity Item by Branch/Plant
27.6%
71.0%
0.376%
0.941%
On Hand Inventory Value
Back Ordered Inventory ...
Future Committed Invent...
On Work Order Inventory...
On Purchase Order Inve...
Branch/Plant :30 and Item :210
Inventory Value Percentage of Highest Cost Item by Branch/Plant
0.934%
1.12%
2.45%
95.5%
On Hand Inventory Value
Back Ordered Inventory ...
Future Committed Invent...
On Work Order Inventor...
On Purchase Order Inve...
Branch/Plant :40 and Item :220

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Inventory Valuation Analysis page:

| Watchlist Alert | Description |
|---|---|
| Items with Cost Undefined | This alerts the users about the number of items for which cost is not defined.<br><br>The alert runs on the P41052 program where the Item Number (Cost File) is not defined. The watchlist considers item costs defined at the branch level.<br><br>This alert is based on the Item Cost Inquiry program (P41052).<br><br>When you click the alert, the system displays the Item Cost Inquiry form.<br><br>The following grid format is available:<br><br>• Basic |
| Items with Price Undefined | This alerts the users about the number of items for which the price is not defined.<br><br>The alert runs on the P41062 program where the Item Number (Price File) is not defined. The watchlist considers item costs defined at the branch level. It considers item price for the branch level and does not consider the item group and customer group.<br><br>This alert is based on the Item Price Inquiry program (P41062).<br><br>When you click the alert, the system displays the Item Price Inquiry form.<br><br>The following grid format is available:<br><br>• Basic |
| Obsolete Items | This alerts the users about the number of items that are currently obsolete.<br><br>This alert is based on the Item Branch Inquiry program (P41027).<br><br>When you click the alert, the system displays the Item Branch Inquiry form. The following form layout is available:<br><br>• Item Availability Inquiry<br>The following grid format is available:<br><br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *Setting Processing Options for Cost Revisions (P4105)* in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide .*
- *Inquiry Programs for Inventory Management*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Inventory Valuation Analysis page:

| Component Title | Description |
|---|---|
| Item Profit Margin (P41700X/W41700XA) | Use this chart to review the items for which the profit margin is lower than the margin specified in the menu drawer, for a particular branch/plant in a company. The chart displays data for various items for a particular branch/plant, location, and lot.<br><br>This chart compares the unit price and unit cost if price is defined in the primary UoM for that item. If item cost is defined at the item level, it is not considered for comparison. Cost Method from F4105 and Currency Code from F4106 are mandatory to compute single unit cost value and single unit price value to render the chart correctly.<br><br>This chart is based on the F4106, F4105, F4101 and F0006 - Join business view (V41065UX). |
| Inventory Value Percentage of Item by Branch/Plant (P41202X/W41202XD) | Use this chart to review the inventory value of an item, in percentage, for a particular branch/plant.<br><br>Cost Method from F4105 is mandatory in the query to have single costing method to derive the unit cost and render the chart properly.<br><br>This chart is based on the F41021, F4105, F4101 and F0006 - Join business view (V41021UA). |
| Inventory Value Percentage of Highest Velocity Item by Branch/Plant (P41026X/W41026XC) | Use this chart to review the inventory value of the most frequently ordered item, in percentage, for a particular branch/plant.<br><br>Cost Method from F4105 is mandatory in the query to have single costing method to derive the unit cost and render the chart properly.<br><br>This chart is based on the Sales Order Detail - Revisions program (V4211C). |
| Inventory Value Percentage of Highest Cost Item by Branch/Plant (P41202X/W41202XA) | Use this chart to review the inventory value of the most expensive item, in percentage, for a particular branch/plant.<br><br>Cost Method from F4105 is mandatory in the query to have single costing method to derive the unit cost and render the chart properly.<br><br>This chart is based on the F41021, F4105, F4101 and F0006 - Join business view (V41021UA). |

For additional information about the programs associated with these charts, see *One View Inventory Valuation Analysis Inquiry (P41271)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Inventory Valuation Analysis page:

| Task | Description |
|---|---|
| Item Availability | Use this task to access the Item Availability - Work With Item Availability program (P41202).<br><br>The following form layout is available:<br><br>• Sales Order Inquiry |
| Cost Revisions | Use this task to access the Cost Revisions - Work With Item Cost program (P4105). |
| Base Price Revisions | Use this task to access the Base Price Revisions - Work With Preference Base Price program (P4106). |
| Manual Inventory to G/L Reconciliation | Use this task to access the Manual Inventory to G/L Reconciliation - Manual Inventory to G/L Reconciliation program (P41500). |
| Item Ledger Inquiry | Use this task to access the Item Ledger Inquiry - Work With Item Ledger program (P4111) |
| Item Branch | Use this task to access the Item Branch - Work With Item Branch program (P41026). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Cost Revisions (P4105)*
- *Setting Processing Options for Manual Inventory to G/L Reconciliation Program (P41500)*
- *Setting Processing Options for Item Branch Plant (P41026)*

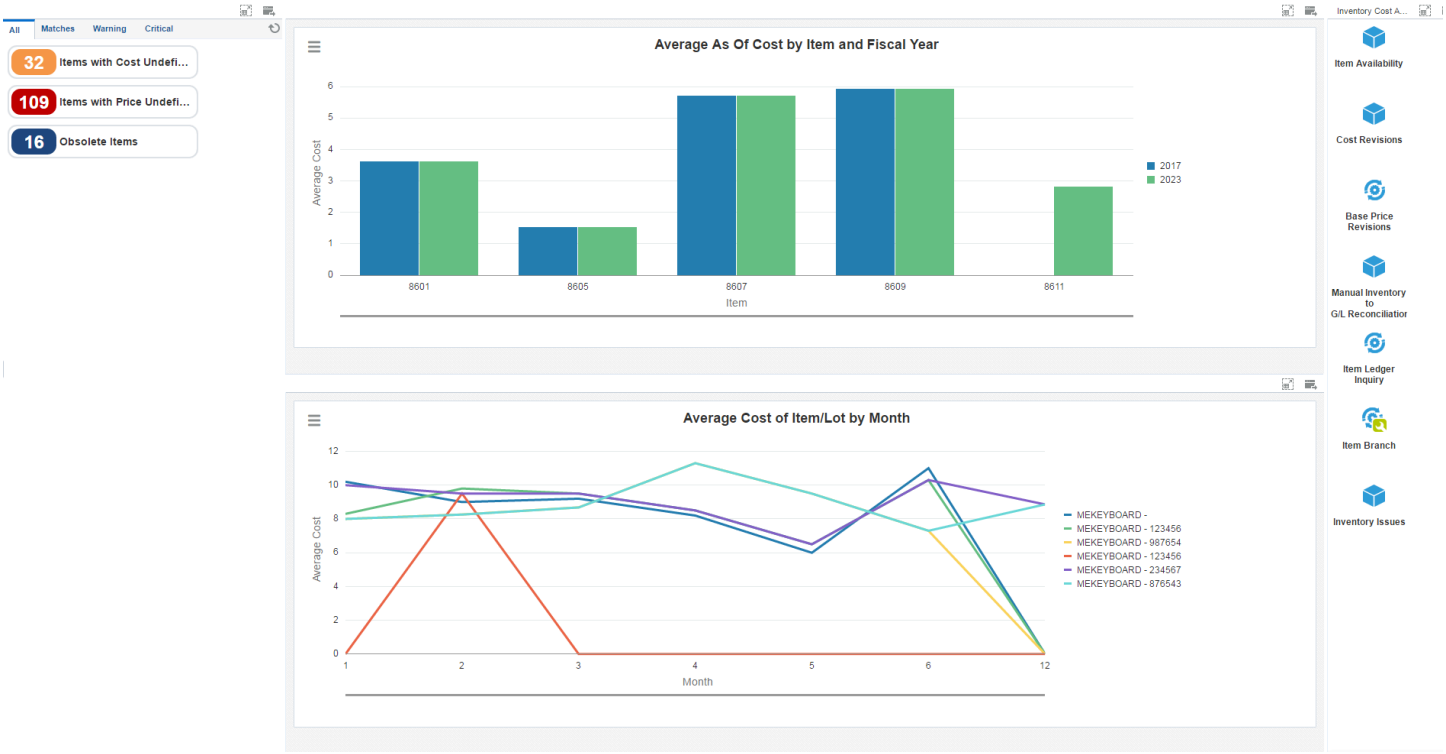
# UX One: Inventory Cost Analysis Page

The Inventory Cost Analysis page (P41001X/W41001XC) enables users to:

- Monitor and manager item/lot cost on a monthly basis.
- Track the cost of items across the years to monitor and manage inventory operational expenditure.
- Easily access various inventory management programs.

To access the UX One Inventory Cost Analysis page, log in to the EnterpriseOne system using the Inventory Accounting Manager role. When you log in with this role, the system automatically displays the Inventory Accounting Manager page. Click the Inventory Cost Analysis task on the springboard to access the Inventory Accounting Manager page.

This graphic illustrates the Inventory Cost Analysis page.


All
Matches
Warning
Critical
32
Items with Cost Undefi...
109
Items with Price Undefi...
16
Obsolete Items
Average As Of Cost by Item and Fiscal Year
Average Cost
Item
8601
8605
8607
8609
8611
2017
2023
Average Cost of Item/Lot by Month
Month
MEKEYBOARD -
MEKEYBOARD - 123456
MEKEYBOARD - 987654
MEKEYBOARD - 123456
MEKEYBOARD - 234567
MEKEYBOARD - 876543
Inventory Cost A...
Item Availability
Cost Revisions
Base Price Revisions
Manual Inventory to G/L Reconciliation
Item Ledger Inquiry
Item Branch
Inventory Issues

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Inventory Cost Analysis page:

| Watchlist Alert | Description |
|---|---|
| Items with Cost Undefined | This alerts the users about the number of items for which cost is not defined.<br><br>The alert runs on the P41052 program where the Item Number (Cost File) is not defined. The watchlist considers item costs defined at the branch level.<br><br>This alert is based on the Item Cost Inquiry program (P41052).<br><br>When you click the alert, the system displays the Item Cost Inquiry form.<br><br>The following grid format is available:<br><br>• Basic |
| Items with Price Undefined | This alerts the users about the number of items for which the price is not defined.<br><br>The alert runs on the P41062 program where the Item Number (Price File) is not defined. The watchlist considers item costs defined at the branch level. It considers the item price for the branch level and does not consider the item group and customer group.<br><br>This alert is based on the Item Price Inquiry program (P41062).<br><br>When you click the alert, the system displays the Item Price Inquiry form.<br><br>The following grid format is available:<br><br>• Basic |
| Obsolete Items | This alerts the users about the number of items that are currently obsolete.<br><br>This alert is based on the Item Branch Inquiry program (P41027).<br><br>When you click the alert, the system displays the Item Branch Inquiry form. The following form layout is available:<br><br>• Item Availability Inquiry<br>The following grid format is available:<br><br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *Setting Processing Options for Cost Revisions (P4105)* in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide .*
- *Inquiry Programs for Inventory Management*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Inventory Cost Analysis page:

| Component Title | Description |
|---|---|
| Average As Of Cost by Item and Fiscal Year (P41272X/W41272XA) | Use this chart to review the average as of cost by item and fiscal year, for a particular branch/plant.<br><br>This chart is based on the One View Inventory Cost Analysis By Item As Of Inquiry program (P41272). |
| Average Cost of Item/Lot by Month (P41270X/W41270XA) | Use this chart to review the average cost of item/lot by month for a company. The chart displays the average cost for a particular item from various lots.<br><br>This chart is based on the One View Average Cost Analysis from Item Ledger Inquiry program (P41270). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Average Cost Analysis from Item Ledger Inquiry (P41270)*
- *One View Inventory Cost Analysis By Item As Of Inquiry (P41272)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Inventory Cost Analysis page:

| Task | Description |
|---|---|
| Item Availability | Use this task to access the Item Availability - Work With Item Availability program (P41202).<br><br>The following form layout is available:<br><br>• Sales Order Inquiry |
| Cost Revisions | Use this task to access the Cost Revisions - Work With Item Cost program (P4105). |
| Base Price Revisions | Use this task to access the Base Price Revisions - Work With Preference Base Price program (P4106). |
| Manual Inventory to G/L Reconciliation | Use this task to access the Manual Inventory to G/L Reconciliation - Manual Inventory to G/L Reconciliation program (P41500). |
| Item Ledger Inquiry | Use this task to access the Item Ledger Inquiry - Work With Item Ledger program (P4111) |
| Item Branch | Use this task to access the Item Branch - Work With Item Branch program (P41026). |
| Inventory Issues | Use this task to access the Inventory Issues - Work With Inventory Issues program (P4112). |

| Task | Description |
| --- | --- |
| | |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Cost Revisions (P4105)*
- *Setting Processing Options for Manual Inventory to G/L Reconciliation Program (41500)*
- *Setting Processing Options for Item Branch Plant (P41026)*
- *Setting Processing Options for Inventory Issues (P4112)*
- *Setting Processing Options for Item Availability (P41202)*

# 35 Inventory Management Roles: Inventory Control Manager (Release 9.2 Update)

## Understanding the Inventory Control Manager UX One Role

The Inventory Control Manager role, and the associated UX One pages and components, enable users to perform the following tasks:

- Regulating inventory in a location such as a plant, factory floor, warehouse, store, or distribution center
- Ensuring that all inventory remains in good condition and overseeing item stocking in timely manner
- Maintaining accurate data on receiving, production, and shipment of stock
- Manage inventory planning and re-orders

The Inventory Control Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Inventory Control Manager role (INVCLMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the INVCLMRJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Inventory Control Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards*

*EnterpriseOne Applications Inventory Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Inventory Management.*

# Using the Inventory Control Manager UX One Role

You use the Inventory Control Manager role to access these UX One pages:

- Inventory Control Manager (P41002X/W41002XA)
- Inventory Status Analysis (P41002X/W41002XB)
- Inventory Movement Analysis (P41002X/W41002XC)

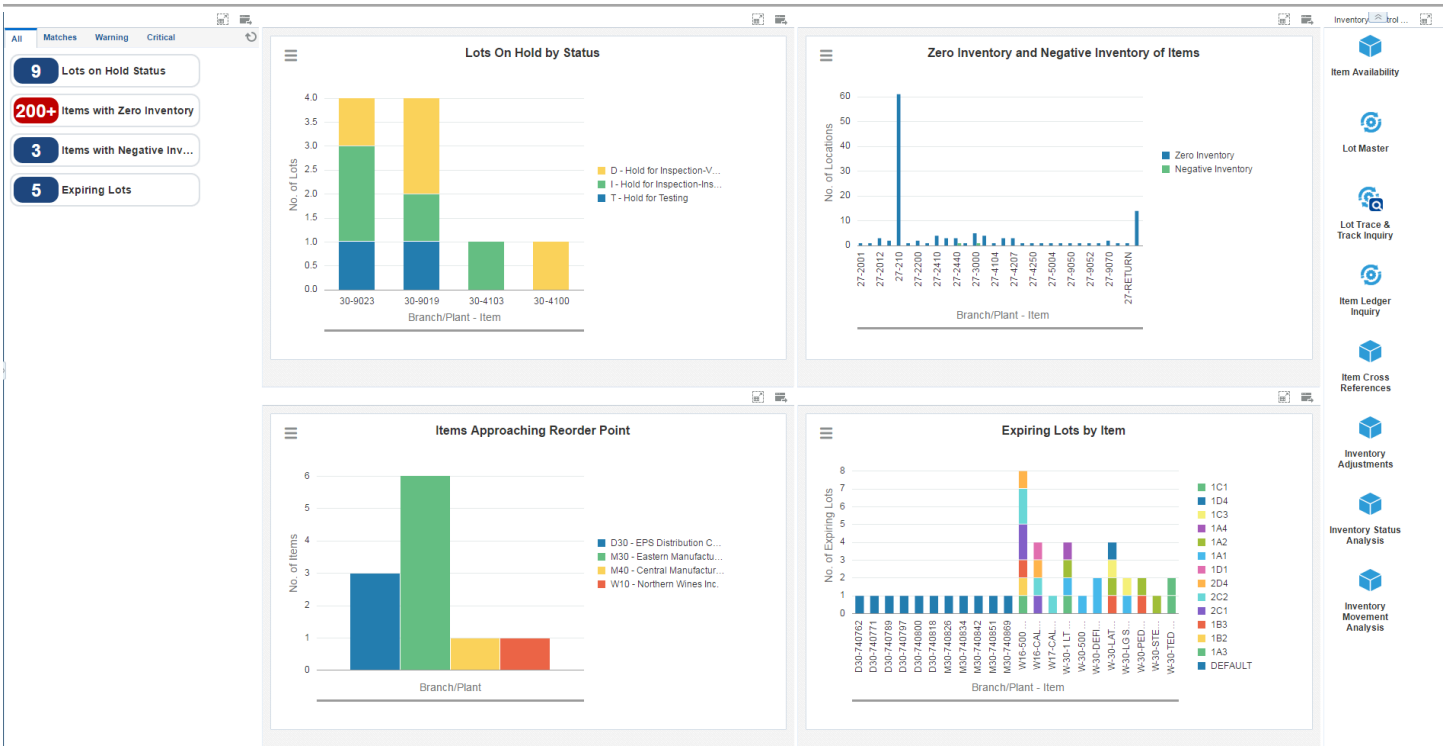
## UX One: Inventory Control Manager Page

The Inventory Control Manager page (P41002X/W41002XA) enables users to:

- Effectively plan inventory by monitoring items approaching reorder point.
- Effectively handle inventory exceptions such as negative or zero inventory situations, or inventory that is on hold.
- Monitor inventory that is about to expire and take proactive measures.

To access the UX One Inventory Control Manager page, log in to the EnterpriseOne system using the Inventory Control Manager role.

This graphic illustrates the Inventory Control Manager page:


All
Matches
Warning
Critical
9
Lots on Hold Status
200+
Items with Zero Inventory
3
Items with Negative Inv...
5
Expiring Lots
Lots On Hold by Status
No. of Lots
Branch/Plant - Item
30-9023
30-9019
30-4103
30-4100
D - Hold for Inspection-V...
I - Hold for Inspection-Ins...
T - Hold for Testing
Zero Inventory and Negative Inventory of Items
No. of Locations
Zero Inventory
Negative Inventory
Items Approaching Reorder Point
No. of Items
Branch/Plant
D30 - EPS Distribution C...
M30 - Eastern Manufactu...
M40 - Central Manufactur...
W10 - Northern Wines Inc.
Expiring Lots by Item
No. of Expiring Lots
Branch/Plant - Item
Item Availability
Lot Master
Lot Trace & Track Inquiry
Item Ledger Inquiry
Item Cross References
Inventory Adjustments
Inventory Status Analysis
Inventory Movement Analysis

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Inventory Control Manager page:

| Watchlist Alert | Description |
|---|---|
| Lots on Hold Status | This alerts the users about the number of lots with an on-hold status across all branch/plants.<br>This alert is based on the Work With Lot Master program (P4108).<br>When you click the alert, the system displays the Work With Lot Master form. The following form layout is available:<br>• Lot and Order Inquiry |
| Items with Zero Inventory | This alerts the users about the number of items with zero availability across all branch/plants.<br>This alert is based on the Item Location Inquiry program (P41205).<br>When you click the alert, the system displays the Item Location Inquiry form. The following form layout is available:<br>• Item Availability Inquiry<br>The following grid format is available:<br>• Basic<br>• Simple |
| Items with Negative Inventory | This alerts the users about the number of items with negative availability across all branch/plants.<br>This alert is based on the Item Location Inquiry program (P41205).<br>When you click the alert, the system displays the Item Location Inquiry form. The following form layout is available:<br>• Item Availability Inquiry<br>The following grid format is available:<br>• Basic<br>• Simple |
| Expiring Lots | This alerts the users about the number of lots that are about to expire in a specified period across all branch/plants.<br>This alert is based on the Work With Lot Master program (P4108).<br>When you click the alert, the system displays the Work With Lot Master form. The following form layout is available:<br>• Lot and Order Inquiry |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Lot Master*
- *Setting Processing Options for Item Availability*
- *Inquiry Programs for Inventory Management*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Inventory Control Manager page:

| Component Title | Description |
|---|---|
| Lots On Hold By Status (P41202X/W41202XE) | Use this chart to review the number of lots with an on-hold status for a particular branch/plant of a company. The legends describe the reasons for which the lots are on hold.<br><br>This chart is based on the Item Location Inquiry program (P41205). |
| Zero Inventory and Negative Inventory of Items (P41202X/W41202XG) | Use this chart to review the number of locations that have items with zero or negative on-hand quantity for various branch/plants across a company.<br><br>This chart is based on the Item Location Inquiry program (P41205). |
| Items Approaching Reorder Point (P41202X/W41202XH) | Use this chart to review the number of items that are approaching the reorder point across all branch/plants in a company. This chart displays records for a specific company. Reorder point is a quantity for an item that specifies when replenishment occurs.<br><br>You can change the threshold percentage (X) from menu drawer to show the items that have reorder point below 100+X percentage of reorder point.<br><br>This chart is based on the F41021, F4102, and F0006 - Join program (V41021UC). |
| Expiring Lots by Item (P41202X/W41202XF) | Use this chart to review the number of lots that are about to expire in a specified period for various branch/plants across a company. The chart displays information of expiring lots for various locations.<br><br>This chart is based on the F4108, F41021, F4101, and F0006 - Join program (V41021UX). |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Inventory Control Manager page:

| Task | Description |
|---|---|
| Item Availability | Use this task to access the Item Availability - Work With Item Availability program (P41202).<br><br>The following form layout is available: |

| Task | Description |
|---|---|
| | • Sales Order Inquiry |
| Lot Master | Use this task to access the Lot Master - Work With Lot Master program (P4108).<br>The following form layout is available:<br>• Lot and Order Inquiry |
| Lot Trace & Track Inquiry | Use this task to access the Lot Trace & Track Inquiry - Lot Management Workbench program (P41203). |
| Item Ledger Inquiry | Use this task to access the Item Ledger Inquiry - Work With Item Ledger program (P4111). |
| Item Cross Reference | Use this task to access the Item Cross Reference - Work With Item Cross Reference program (P4104). |
| Inventory Adjustments | Use this task to access the Inventory Adjustments - Work With Inventory Adjustments program (P4114). |
| Inventory Status Analysis | Use this task to access the Inventory Status Analysis page (P41002X/W41002XB) |
| Inventory Movement Analysis | Use this task to access the Inventory Movement Analysis page (P41002X/W41002XC) |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Item Cross Reference*
- *Setting Processing Options for Item Branch Plant*
- *Setting Processing Options for Inventory Transfers*
- *Setting Processing Options for Inventory Adjustments*
- *Setting Processing Options for Track/Trace Inquiry*

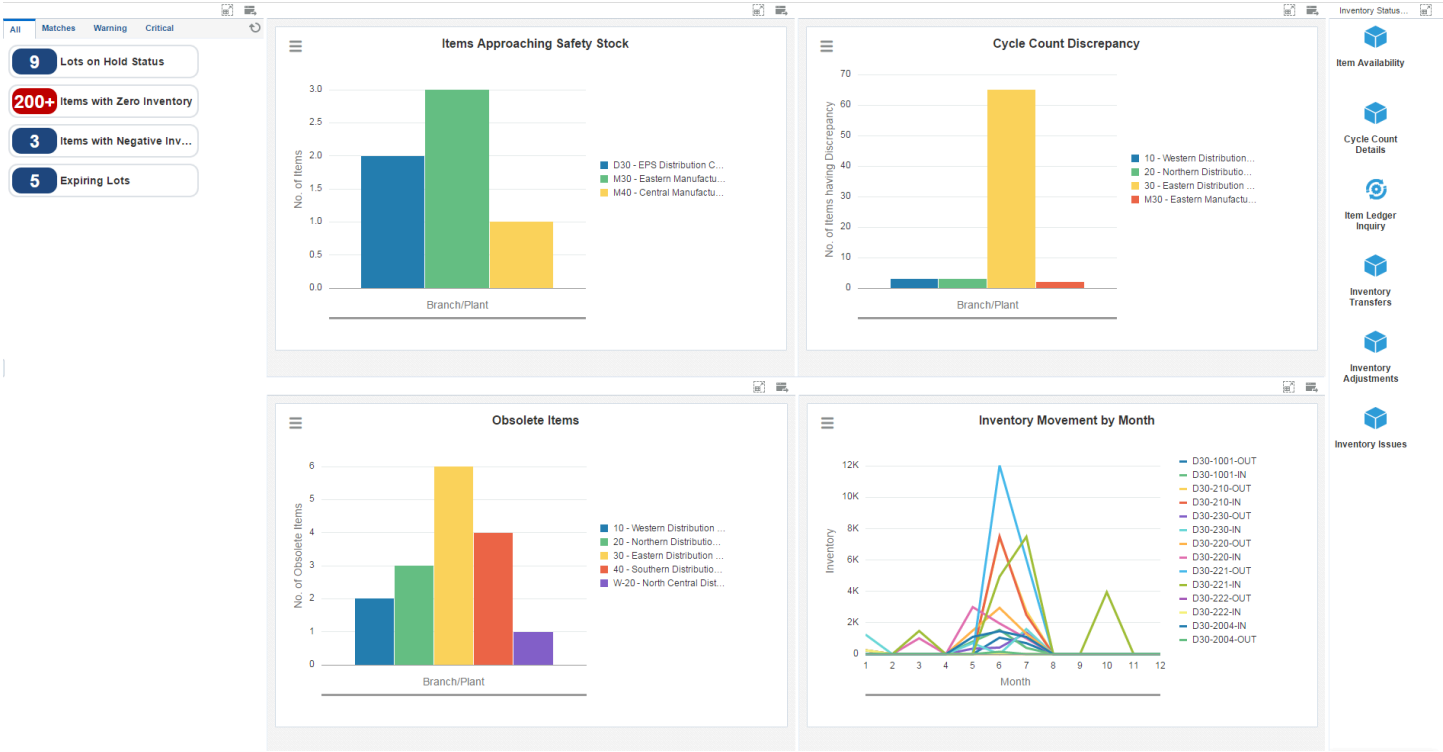
# UX One: Inventory Status Analysis Page

The Inventory Status Analysis page (P41002X/W41002XB) enables users to:

- Effectively handle cycle count variance.
- Monitor inventory movement by month.
- Effectively plan inventory by monitoring items nearing safety stock point.
- Effectively control inventory by identifying obsolete inventory.

To access the UX One Inventory Status Analysis page, log in to the EnterpriseOne system using the Inventory Control Manager role. When you log in with this role, the system automatically displays the Inventory Control Manager home page. Click on the Inventory Status Analysis task on the springboard to access the Inventory Status Analysis page.

This graphic illustrates the Inventory Status Analysis page:


All
Matches
Warning
Critical
9
Lots on Hold Status
200+
Items with Zero Inventory
3
Items with Negative Inv...
5
Expiring Lots
Items Approaching Safety Stock
No. of Items
Branch/Plant
D30 - EPS Distribution C...
M30 - Eastern Manufactu...
M40 - Central Manufactu...
Cycle Count Discrepancy
No. of Items having Discrepancy
Branch/Plant
10 - Western Distribution...
20 - Northern Distributio...
30 - Eastern Distribution ...
M30 - Eastern Manufactu...
Obsolete Items
No. of Obsolete Items
Branch/Plant
10 - Western Distribution ...
20 - Northern Distributio...
30 - Eastern Distribution ...
40 - Southern Distributio...
W-20 - North Central Dist...
Inventory Movement by Month
Inventory
Month
D30-1001-OUT
D30-1001-IN
D30-210-OUT
D30-210-IN
D30-230-OUT
D30-230-IN
D30-220-OUT
D30-220-IN
D30-221-OUT
D30-221-IN
D30-222-OUT
D30-222-IN
D30-2004-IN
D30-2004-OUT
Inventory Status...
Item Availability
Cycle Count Details
Item Ledger Inquiry
Inventory Transfers
Inventory Adjustments
Inventory Issues

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Inventory Status Analysis page:

| Watchlist Alert | Description |
|---|---|
| Lots on Hold Status | This alerts the users about the number of lots with an on-hold status across all branch/plants.<br>This alert is based on the Work With Lot Master program (P4108).<br>When you click the alert, the system displays the Work With Lot Master form. The following form layout is available:<br>• Lot and Order Inquiry |
| Items with Zero Inventory | This alerts the users about the number of items with zero availability across all branch/plants.<br>This alert is based on the Item Location Inquiry program (P41205).<br>When you click the alert, the system displays the Item Location Inquiry form. The following form layout is available:<br>• Item Availability Inquiry<br>The following grid format is available:<br>• Basic<br>• Simple |
| Items with Negative Inventory | This alerts the users about the number of items with negative availability across all branch/plants.<br>This alert is based on the Item Location Inquiry program (P41205).<br>When you click the alert, the system displays the Item Location Inquiry form. The following form layout is available:<br>• Item Availability Inquiry<br>The following grid format is available:<br>• Basic<br>• Simple |
| Expiring Lots | This alerts the users about the number of lots that are about to expire in a specified period across all branch/plants.<br>This alert is based on the Work With Lot Master program (P4108).<br>When you click the alert, the system displays the Work With Lot Master form. The following form layout is available:<br>• Lot and Order Inquiry |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Lot Master*
- *Setting Processing Options for Item Availability*
- *Inquiry Programs for Inventory Management*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Inventory Status Analysis page:

| Component Title | Description |
|---|---|
| Items Approaching Safety Stock Point (P41202X/W41202XI) | Use this chart to review the number of items that are approaching the safety stock point across all branch/plants in a company. This chart displays records for a specific company. Safety stock is the quantity of stock kept on hand to cover high-side variations in demand.<br><br>You can change the threshold percentage (X) from menu drawer to show the items that have on-hand stock below 100+X percentage of safety stock.<br><br>This chart is based on the F41021, F4102, and F0006 - Join program (V41021UC). |
| Cycle Count Discrepancy (P41241X/W41241XA) | Use this chart to review the number of items that have cycle count variance for a list of branch/plants of a company.<br><br>This alert is based on the Work With Cycle Count Detail program (P41241). |
| Obsolete Items (P41026X/W41026XA) | Use this chart to review the number of items that are obsolete across all branch/plants of a company.<br><br>This chart is based on the Item Branch Inquiry program (P41027). |
| Inventory Movement by Month (P41273X/W41273XA) | Use this chart to review the inventory movement for a list of items by month for a particular branch/plant.<br><br>This alert is based on the One View Item Usage Trace Inquiry program (P41273). |

For additional information about the programs associated with these charts, see *One View Inventory Cost Analysis By Item As Of Inquiry* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide .*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Inventory Status Analysis page:

| Task | Description |
|---|---|
| Item Availability | Use this task to access the Item Availability - Work With Item Availability program (P41202).<br>The following form layout is available:<br>• Sales Order Inquiry |
| Cycle Count Detail | Use this task to access the Cycle Count Details - Work With Cycle Count Detail program (P41241). |
| Item Ledger Inquiry | Use this task to access the Item Ledger Inquiry - Work With Item Ledger program (P4111). |
| Inventory Transfers | Use this task to access the Inventory Transfers - Work With Inventory Transfers program (P4113). |
| Inventory Adjustments | Use this task to access the Inventory Adjustments - Work With Inventory Adjustments program (P4114). |
| Inventory Issues | Use this task to access the Inventory Issues - Inventory Issues program (P4112). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Inventory Issues*
- *Setting Processing Options for the Summary Availability Program*
- *Setting Processing Options for Item Branch Plant*
- *Setting Processing Options for Inventory Transfers*
- *Setting Processing Options for Item Cross Reference*
- *Setting Processing Options for Track/Trace Inquiry*

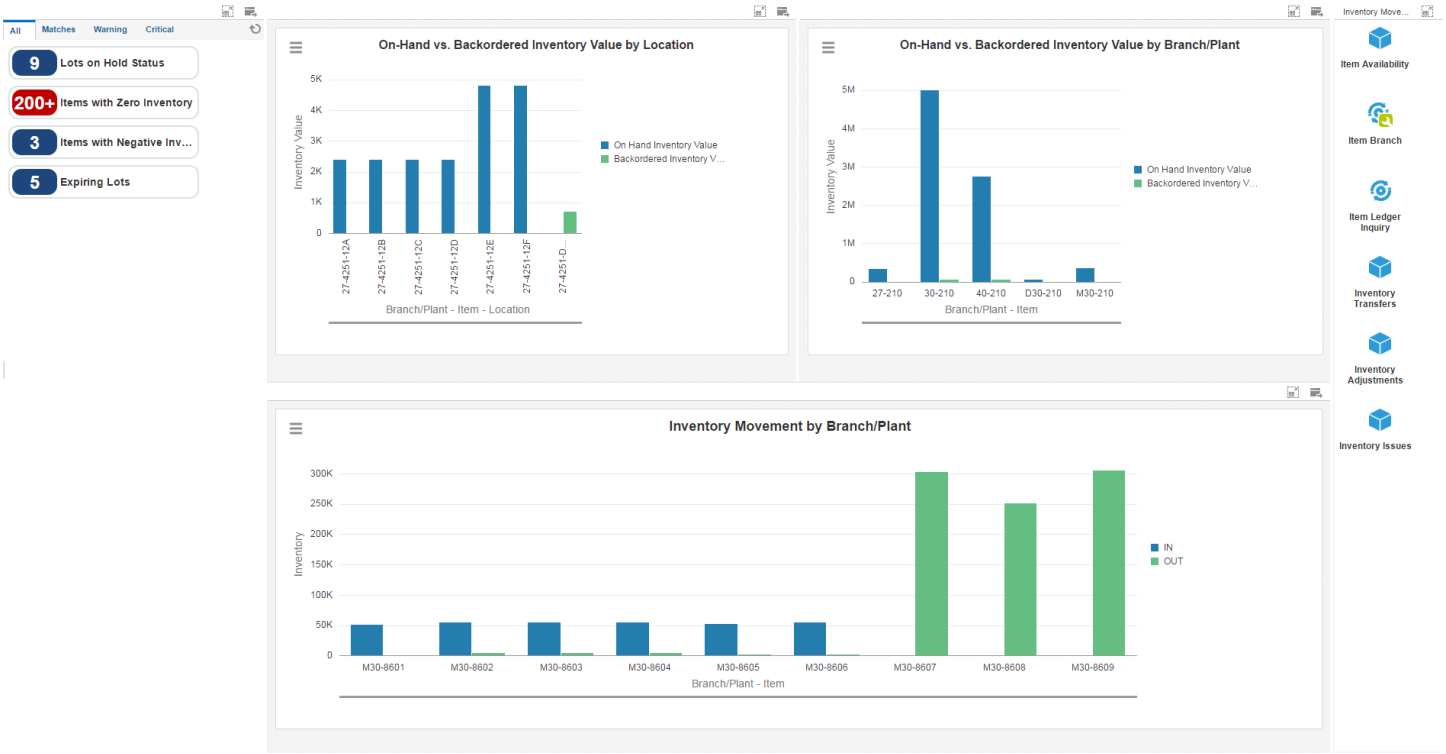
# UX One: Inventory Movement Analysis Page

The Inventory Movement Analysis page (P41002X/W41002XC) enables users to:

- Improve inventory operations by monitoring inventory movement across all locations and branch/plants.
- Improve order fill rate by monitoring inventory movement and prioritizing customer demands.

To access the UX One Inventory Movement Analysis page, log in to the EnterpriseOne system using the Inventory Control Manager role. When you log in with this role, the system automatically displays the Inventory Control Manager home page. Click the Inventory Movement Analysis task on the springboard to access the Inventory Movement Analysis page.

This graphic illustrates the Inventory Movement Analysis page:


All
Matches
Warning
Critical
9
Lots on Hold Status
200+
Items with Zero Inventory
3
Items with Negative Inv...
5
Expiring Lots
On-Hand vs. Backordered Inventory Value by Location
Inventory Value
5K
4K
3K
2K
1K
0
27-4251-12A
27-4251-12B
27-4251-12C
27-4251-12D
27-4251-12E
27-4251-12F
27-4251-D...
Branch/Plant - Item - Location
On Hand Inventory Value
Backordered Inventory V...
On-Hand vs. Backordered Inventory Value by Branch/Plant
Inventory Value
5M
4M
3M
2M
1M
0
27-210
30-210
40-210
D30-210
M30-210
Branch/Plant - Item
On Hand Inventory Value
Backordered Inventory V...
Inventory Move...
Item Availability
Item Branch
Item Ledger Inquiry
Inventory Transfers
Inventory Adjustments
Inventory Issues
Inventory Movement by Branch/Plant
Inventory
300K
250K
200K
150K
100K
50K
0
M30-8601
M30-8602
M30-8603
M30-8604
M30-8605
M30-8606
M30-8607
M30-8608
M30-8609
Branch/Plant - Item
IN
OUT

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Inventory Movement Analysis page:

| Watchlist Alert | Description |
|---|---|
| Lots on Hold Status | This alerts the users about the number of lots with an on-hold status across all branch/plants.<br>This alert is based on the Work With Lot Master program (P4108).<br>When you click the alert, the system displays the Work With Lot Master form. The following form layout is available:<br>• Lot and Order Inquiry |
| Items with Zero Inventory | This alerts the users about the number of items with zero availability across all branch/plants.<br>This alert is based on the Item Location Inquiry program (P41205).<br>When you click the alert, the system displays the Item Location Inquiry form. The following form layout is available:<br>• Item Availability Inquiry<br>The following grid format is available:<br>• Basic<br>• Simple |
| Items with Negative Inventory | This alerts the users about the number of items with negative availability across all branch/plants.<br>This alert is based on the Item Location Inquiry program (P41205).<br>When you click the alert, the system displays the Item Location Inquiry form. The following form layout is available:<br>• Item Availability Inquiry<br>The following grid format is available:<br>• Basic<br>• Simple |
| Expiring Lots | This alerts the users about the number of lots that are about to expire in a specified period across all branch/plants.<br>This alert is based on the Work With Lot Master program (P4108).<br>When you click the alert, the system displays the Work With Lot Master form. The following form layout is available:<br>• Lot and Order Inquiry |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Lot Master*
- *Setting Processing Options for Item Availability*
- *Inquiry Programs for Inventory Management*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Inventory Movement Analysis page:

| Component Title | Description |
|---|---|
| On-Hand vs. Backordered Inventory Value by Location (P41202X/W41202XB) | Use this chart to review the on-hand and backordered inventory values across all locations, for a particular branch/plant.<br><br>**Note:** It is mandatory to have a single costing method from F4105, to derive unit cost and to render the chart properly.<br><br>This chart is based on the F41021, F4105, F4101 and F006 - Join program (V41021UA). |
| On-Hand vs. Backordered Inventory Value by Branch/Plant (P41202X/W41202XC) | Use this chart to review the on-hand and backordered inventory values across all branch/plants in a particular company.<br><br>**Note:** It is mandatory to have a single costing method from F4105, to derive unit cost and to render the chart properly.<br><br>This chart is based on the F41021, F4105, F4101 and F006 - Join program (V41021UA). |
| Inventory Movement by Branch/Plant (P41202X/W41202XF) | Use this chart to review the number of incoming and outgoing inventory for a list of items for a particular branch/plant.<br><br>This alert is based on the One View Item Usage Trace Inquiry program (P41273). |

For additional information about the programs associated with these charts, see *One View Inventory Cost Analysis By Item As Of Inquiry* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springbard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Inventory Movement Analysis page:

| Task | Description |
|---|---|
| Item Availability | Use this task to access the Item Availability - Work With Item Availability program (P41202).<br><br>The following form layout is available: |

| Task | Description |
|---|---|
| | • Sales Order Inquiry |
| Item Branch | Use this task to access the Item Branch - Work With Item Branch program (P41026). |
| Item Ledger Inquiry | Use this task to access the Item Ledger Inquiry - Work With Item Ledger program (P4111). |
| Inventory Transfers | Use this task to access the Inventory Transfers - Work With Inventory Transfers program (P4113). |
| Inventory Adjustments | Use this task to access the Inventory Adjustments - Work With Inventory Adjustments program (P4114). |
| Inventory Issues | Use this task to access the Inventory Issues - Inventory Issues program (P4112). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*:

- *Setting Processing Options for Inventory Issues*
- *Setting Processing Options for the Summary Availability Program*
- *Setting Processing Options for Item Branch Plant*
- *Setting Processing Options for Inventory Transfers*
- *Setting Processing Options for Item Cross Reference*
- *Setting Processing Options for Track/Trace Inquiry*

# 36 Manufacturing Roles: Plant Manager (Release 9.2 Update)

## Understanding the Plant Manager UX One Role

The Plant Manager role, and the associated UX One pages and components, enable users to:

- Understand and manage budget variance to reduce maintenance costs.
- Optimize maintenance activities with greater visibility.
- Monitor incidents to improve organization safety.

The Plant Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Plant Manager role (PLANMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the PLANMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Plant Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Product Costing and Manufacturing Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Product Costing and Manufacturing Accounting*.

# Using the Plant Manager UX One Role

You use the Plant Manager role to access these UX One pages:

- Plant Manager (P31001X|X|W31001XA)
- Production Cost Variances (P31001X|W31001XB)
- Maintenance Cost Performance (P13003X|W13003XE)
- Maintenance Reliability (P13003X|W13003XC)
- Plant Safety (P31001X|W31001XC)
- Maintenance Work Order Load (P13003X|W13003XB)

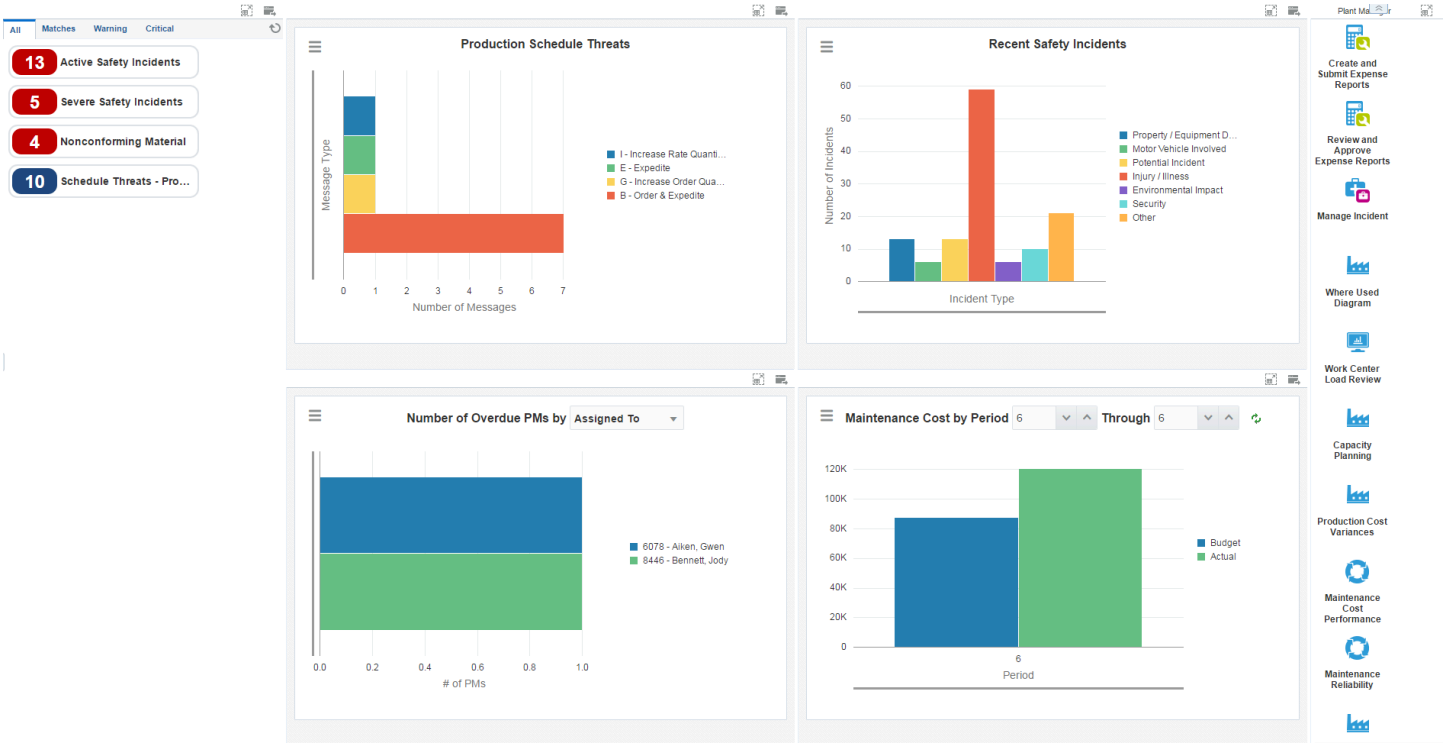
## UX One: Plant Manager Page

The Plant Manager page (P31001X|W31001XA) enables users to:

- Receive alerts regarding safety incidents, nonconforming material, and production schedule threats.
- Analyze production schedule threats, recent safety incidents, overdue preventive maintenance, and maintenance cost for a period.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Plant Manager page, log in to the EnterpriseOne system using the Plant Manager role.

This graphic illustrates the Plant Manager page:


All
Matches
Warning
Critical
13
Active Safety Incidents
5
Severe Safety Incidents
4
Nonconforming Material
10
Schedule Threats - Pro...
Production Schedule Threats
Message Type
Number of Messages
I - Increase Rate Quanti...
E - Expedite
G - Increase Order Qua...
B - Order & Expedite
Recent Safety Incidents
Number of Incidents
Incident Type
Property / Equipment D...
Motor Vehicle Involved
Potential Incident
Injury / Illness
Environmental Impact
Security
Other
Number of Overdue PMs by
Assigned To
# of PMs
6078 - Aiken, Gwen
8446 - Bennett, Jody
Maintenance Cost by Period
Through
Period
Budget
Actual
Create and Submit Expense Reports
Review and Approve Expense Reports
Manage Incident
Where Used Diagram
Work Center Load Review
Capacity Planning
Production Cost Variances
Maintenance Cost Performance
Maintenance Reliability

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Plant Manager page:

| Watchlist Alert | Description |
|---|---|
| Active Safety Incidents | This alert tells users the number of active safety incidents associated with their team.<br><br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br><br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br><br>• Review Incidents<br>The following grid format is available:<br><br>• Simple |
| Severe Safety Incidents | This alert tells users the number of severe safety incidents associated with their team.<br><br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br><br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br><br>• Review Incidents<br>The following grid format is available:<br><br>• Simple |
| Nonconforming Material | This alert tells users the number of test failures waiting for disposition.<br><br>This alert is based on the Work With Nonconforming Test Results program (P3703).<br><br>When you click the alert, the system displays the Work With Nonconforming Test Results form. The following form layout is available:<br><br>• Supply and Demand Inquiry |
| Schedule Threats - Production | This alert tells users the number of supply/demand conditions that threaten production schedule.<br><br>This alert is based on the One View Planning Analysis Inquiry program (P48290).<br><br>When you click the alert, Order and Expedite, Expedite, and Increase message types are displayed on the One View Planning Analysis Inquiry form. The following form layout is available:<br><br>• Where Used Diagram<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs accessed by these watchlists, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Incident Summary Inquiry (P54HDS220)*
- *One View Planning Analysis Inquiry (P48290)*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Plant Manager page:

| Component Title | Description |
|---|---|
| Production Schedule Threats (P48290X\|W48920XA) | Use this chart to review various types of and the number of threat messages that may affect the production schedule.<br><br>This chart is based on the One View Planning Analysis Inquiry program (P48290). |
| Recent Safety Incidents (P54HS22X\|W54HS22XE) | Use this chart to review the type and number of safety incidents that occurred recently.<br><br>This chart is based on is the One View Incident Summary Inquiry program (P54HS220). |
| Number of Overdue PMs (P13570X\|W13570XA) | Use this chart to view the number of preventative maintenance records that are currently overdue.<br><br>This chart is based on the One View PM Inquiry program (P13570).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Service Type |
| Maintenance Cost (P09217X\|W09217XF) | Use this chart to view budgeted and actual amounts for a range of time periods.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217).<br><br>Additionally, you can use the fields at the top of the chart to specify a time period. |

For additional information about the programs accessed by these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Incident Summary Inquiry (P54HDS220)*
- *One View Planning Analysis Inquiry (P48290)*
- *One View Account Balance Inquiry (P09217)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Plant Manager page:

| Task | Description |
|---|---|
| Create and Submit Expense Reports | Use this task to access the Create and Submit Expense Reports - Expense Reports program (P09E2011). |
| Review and Approve Expense Reports | Use this task to access the Review and Approve Expense Reports - Expense Reports program (P09E2011). |
| Manage Incident | Use this task to access the Manage Incident - Manage Incidents program (P54HS00).<br><br>The following grid format is available:<br><br>• Simple |
| Where Used Diagram | Use this task to access the Where Used Diagram.<br><br>See *Viewing Item Information in the Where Used Diagram* in the *JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* . |
| Work Center Load Review | Use this task to access the Work Center Load Review (E313000).<br><br>See *Managing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* . |
| Capacity Planning | Use this task to access the Capacity Planning - Work With Capacity Message Summary program (P3301).<br><br>The following form layout is available:<br><br>• Capacity Planning |
| Production Cost Variances | Use this task to access the Production Cost Variances page (P31001X\|W31001XB). |
| Maintenance Cost Performance | Use this task to access the Maintenance Cost Performance page (P13003X\|W13003XE). |
| Maintenance Reliability | Use this task to access the Maintenance Reliability page (P13003X\|W13003XC). |
| Plant Safety | Use this task to access the Plant Safety page (P31001X\|W31001XC). |
| Maintenance Work Order Load | Use this task to access the Maintenance Work Order Load page (P13003X\|W13003XB). |

For additional information about the programs accessed by these tasks, see these topics:

- *Entering Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*
- *Entering and Managing Incidents* in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implemenation Guide*
- *Using the Where Used Diagram (Release 9.2 Update)* in the *JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide*

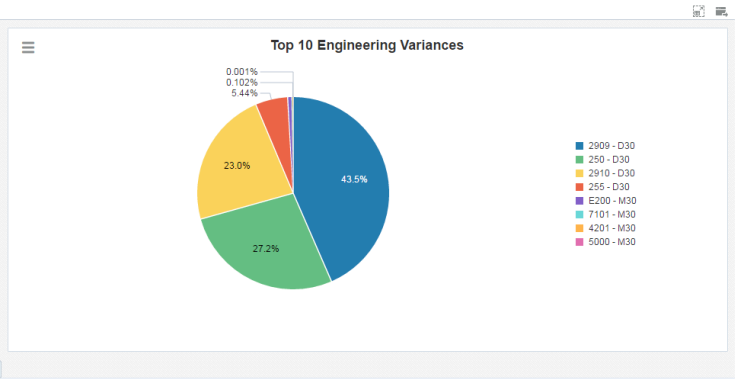
- *Managing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*
- *Planning Production Capacity* in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*

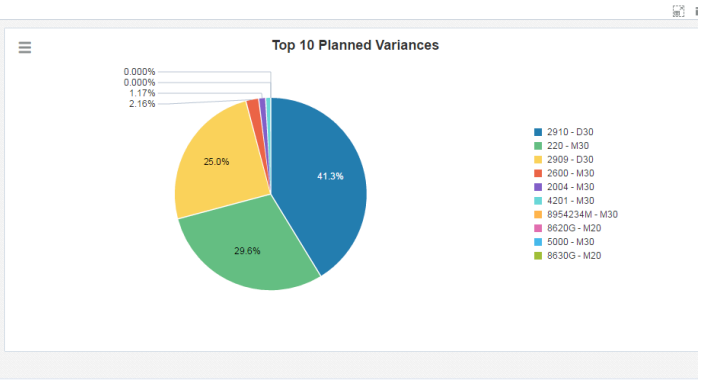
# UX One: Production Cost Variances Page

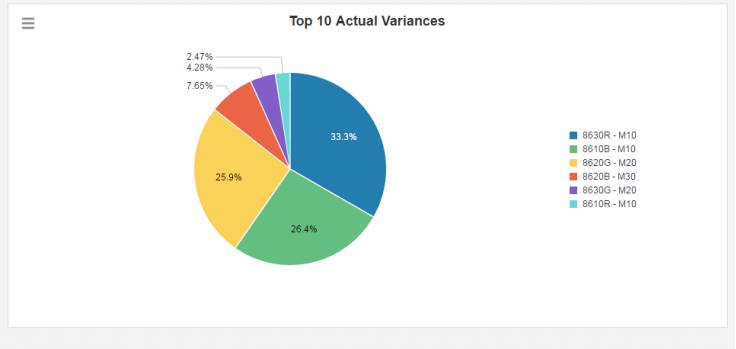
The Production Cost Variances page (P31001X|W31001XB) enables users to analyze recent engineering, planned, actual, and net variances of production costs.

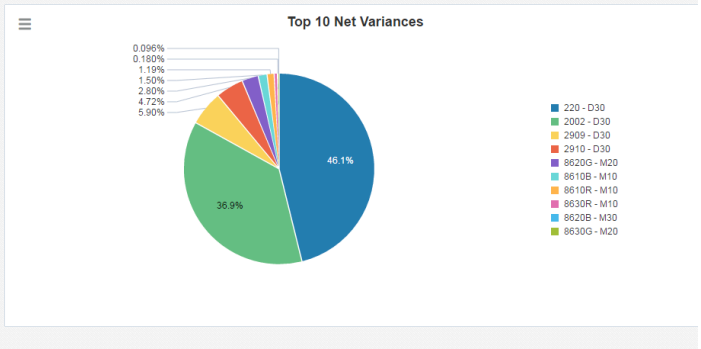
To access the UX One Production Cost Variances page, log in to the EnterpriseOne system using the Plant Manager role. When you log in with this role, the system automatically displays the Plant Manager page. Click the Production Cost Variances task on the springboard to access the Production Cost Variances page.

This graphic illustrates the Production Cost Variances page:


Top 10 Engineering Variances
0.001%
0.102%
5.44%
43.5%
23.0%
27.2%
2909 - D30
250 - D30
2910 - D30
255 - D30
E200 - M30
7101 - M30
4201 - M30
5000 - M30


Top 10 Planned Variances
0.000%
0.000%
1.17%
2.16%
41.3%
25.0%
29.6%
2910 - D30
220 - M30
2909 - D30
2600 - M30
2004 - M30
4201 - M30
8954234M - M30
8620G - M20
5000 - M30
8630G - M20


Top 10 Actual Variances
2.47%
4.28%
7.65%
33.3%
25.9%
26.4%
8630R - M10
8610B - M10
8620G - M20
8620B - M30
8630G - M20
8610R - M10


Top 10 Net Variances
0.096%
0.180%
1.19%
1.50%
2.80%
4.72%
5.90%
46.1%
36.9%
220 - D30
2002 - D30
2909 - D30
2910 - D30
8620G - M20
8610B - M10
8610R - M10
8630R - M10
8620B - M30
8630G - M20

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Production Cost Variances page:

| Component Title | Description |
|---|---|
| Top 10 Engineering Variances (P48270X\|W48270XA) | Use this chart to view the top 10 engineering variances by item and branch/plant.<br><br>This chart is based on the One View Work Order Cost Analysis Inquiry program (P48270). |
| Top 10 Planned Variances (P48270X\|W48270XB) | Use this chart to view the top 10 planned variances by item and branch/plant.<br><br>This chart is based on the One View Work Order Cost Analysis Inquiry program (P48270). |
| Top 10 Actual Variances (P48270X\|W48270XC) | Use this chart to view the top 10 actual variances by item and branch/plant.<br><br>This chart is based on the One View Work Order Cost Analysis Inquiry program (P48270). |
| Top 10 Net Variances (P48270X\|W48270XD) | Use this chart to view the top 10 net variances by item and branch/plant.<br><br>This chart is based on the One View Work Order Cost Analysis Inquiry program (P48270). |

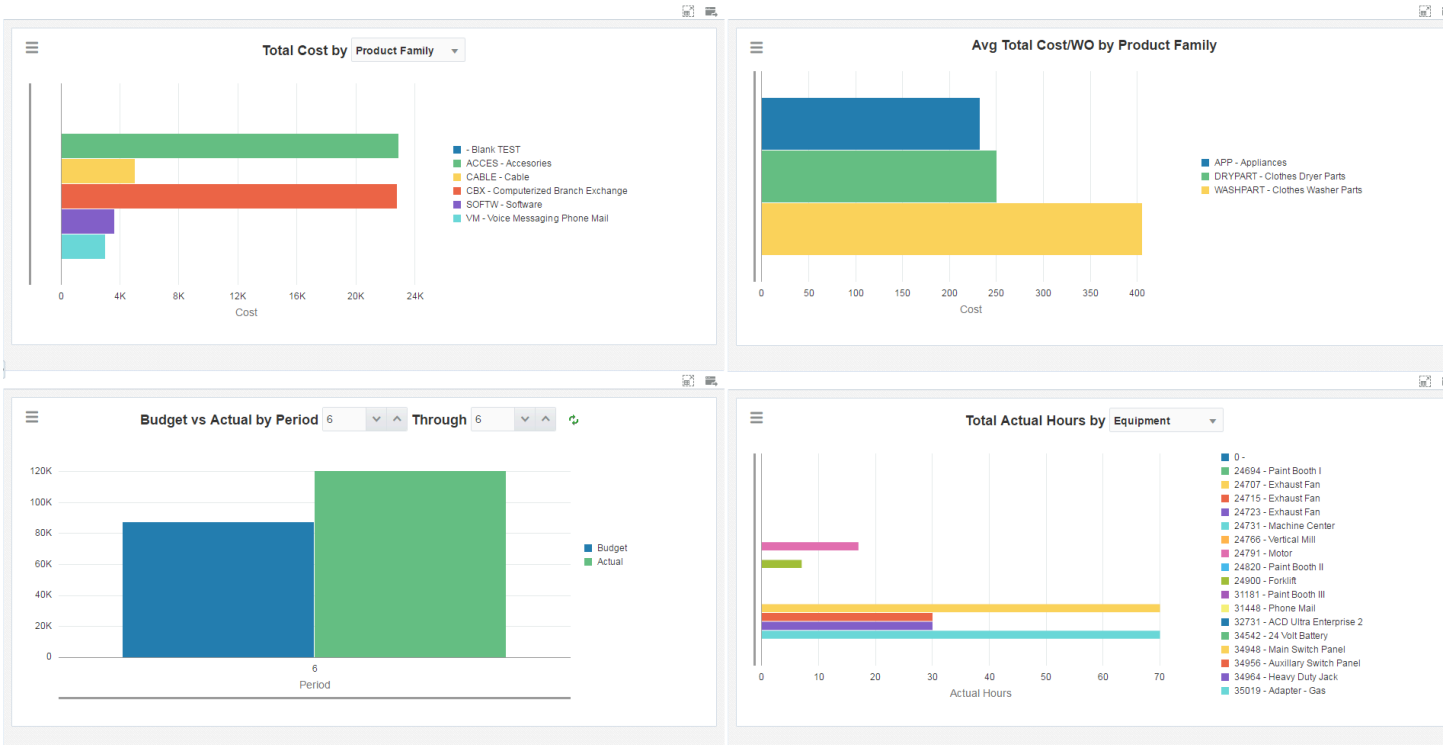
For additional information about the programs accessed by these charts, see *One View Work Order Cost Analysis Inquiry (P48270)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# UX One: Maintenance Cost Performance Page

The Maintenance Cost Performance page (P13003X|W13003XE) enables users to review analytical data about the cost associated with the equipment and work orders for your maintenance team.

To access the UX One Maintenance Cost Performance page, log in to the EnterpriseOne system using the Plant Manager role. When you log in with this role, the system automatically displays the Plant Manager page. Click the Maintenance Cost Performance task on the springboard to access the Maintenance Cost Performance page.

This graphic illustrates the Maintenance Cost Performance page:


Total Cost by Product Family
- Blank TEST
ACCES - Accesories
CABLE - Cable
CBX - Computerized Branch Exchange
SOFTW - Software
VM - Voice Messaging Phone Mail
0
4K
8K
12K
16K
20K
24K
Cost
Avg Total Cost/WO by Product Family
APP - Appliances
DRYPART - Clothes Dryer Parts
WASHPART - Clothes Washer Parts
0
50
100
150
200
250
300
350
400
Cost
Budget vs Actual by Period 6 Through 6
120K
100K
80K
60K
40K
20K
0
6
Period
Budget
Actual
Total Actual Hours by Equipment
0 -
24694 - Paint Booth I
24707 - Exhaust Fan
24715 - Exhaust Fan
24723 - Exhaust Fan
24731 - Machine Center
24766 - Vertical Mill
24791 - Motor
24820 - Paint Booth II
24900 - Forklift
31181 - Paint Booth III
31448 - Phone Mail
32731 - ACD Ultra Enterprise 2
34542 - 24 Volt Battery
34948 - Main Switch Panel
34956 - Auxiliary Switch Panel
34964 - Heavy Duty Jack
35019 - Adapter - Gas
0
10
20
30
40
50
60
70
Actual Hours

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Cost Performance page:

| Component Title | Description |
|---|---|
| Total Cost (P13560X\|W13560XG) | Use this chart to view total costs for work orders.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Product Family<br>• Product Model<br>• Equipment |
| Avg Total Cost//WO by Product Family (P13560X\|W13560XN) | Use this chart to view the average total cost per work order by product family.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560). |
| Budget vs Actual by Period (P09217X\|W09217XD) | Use this chart to view budgeted and actual amounts for a time period.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217).<br><br>Additionally, you can use the fields at the top of the chart to specify a time period. |
| Total Actual Hours (P13560X\|W13560XR) | Use this chart to view the actual number of hours for your equipment.<br><br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560). You can select One of these options:<br><br>• Equipment<br>• Product Family<br>• Product Model |

For additional information about the programs associated with these charts, see these topics in *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

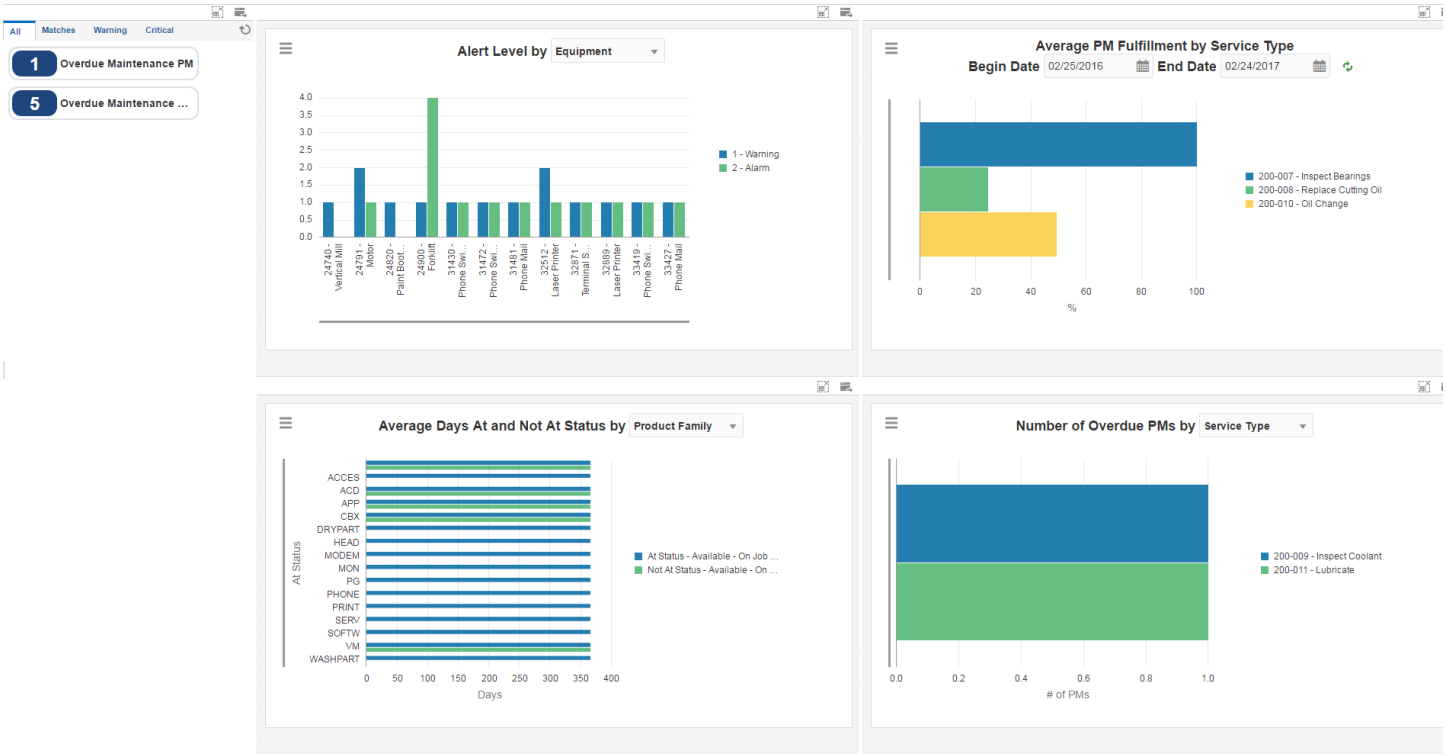
- *One View Work Order Analysis (P13560)*
- *One View Account Balance Inquiry (P09217)*

# UX One: Maintenance Reliability Page

The Maintenance Reliability page (P13003X|W13003XC) enables users to receive alerts regarding overdue work orders and preventive maintenance records that require attention. The page also provides analytical data about the reliability of the equipment used by the maintenance team.

To access the UX One Maintenance Reliability page, log in to the EnterpriseOne system using the Plant Manager role. When you log in with this role, the system automatically displays the Plant Manager page. Click the Maintenance Reliability task on the springboard to access the Maintenance Reliability page.

This graphic illustrates the Maintenance Reliability page:


All
Matches
Warning
Critical
1
Overdue Maintenance PM
5
Overdue Maintenance ...
Alert Level by
Equipment
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
24740 - Vertical Mill
24791 - Motor
24820 - Paint Boot...
24900 - Forklift
31430 - Phone Swi...
31472 - Phone Swi...
31481 - Phone Mail
32512 - Laser Printer
32871 - Terminal S...
32889 - Laser Printer
33419 - Phone Swi...
33427 - Phone Mail
1 - Warning
2 - Alarm
Average PM Fulfillment by Service Type
Begin Date
02/25/2016
End Date
02/24/2017
200-007 - Inspect Bearings
200-008 - Replace Cutting Oil
200-010 - Oil Change
0
20
40
60
80
100
%
Average Days At and Not At Status by
Product Family
At Status
ACCES
ACD
APP
CBX
DRYPART
HEAD
MODEM
MON
PG
PHONE
PRINT
SERV
SOFTW
VM
WASHPART
At Status - Available - On Job ...
Not At Status - Available - On ...
0
50
100
150
200
250
300
350
400
Days
Number of Overdue PMs by
Service Type
200-009 - Inspect Coolant
200-011 - Lubricate
0.0
0.2
0.4
0.6
0.8
1.0
# of PMs

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Reliability page:

| Watchlist Alert | Description |
|---|---|
| Overdue Maintenance PM | This alert tells users the number of preventive maintenance records that are currently overdue.<br><br>This alert is based on the PM Backlog program (P12071).<br><br>When you click the alert, the system displays the PM Backlog form. |
| Overdue Maintenance WOs | This alert tells users the number of work orders that are currently overdue.<br><br>This alert is based on the Search for Equipment Work Orders program (P13700).<br><br>When you click the alert, the system displays the Search for Equipment Work Orders form. The following form layout is available:<br><br>• Equipment WOs<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Reliability page:

| Component Title | Description |
|---|---|
| Alert Level (P1310X\|W1310XA) | Use this chart to view the alert level for each piece of equipment.<br><br>This chart is based on the Condition-Based Alerts Workbench program (P1310). |

| Component Title | Description |
|---|---|
| | Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Equipment<br>• Product Family<br>• Product Model<br>• Manufacturer |
| Average PM Fulfillment by Service Type (P13570X/W13570XC) | Use this chart to view data about the average preventative maintenance fulfillment by service type.<br>This chart is based on the One View PM Analysis program (P13570).<br>Additionally, you can use the Begin Date and End Date fields to adjust the date range for the chart. |
| Average Days At and Not At Status (P13400X\|W13400XA) | Use this chart to view the number of days that equipment items have been at or not at a specified status.<br>This chart is based on the One View Equipment Status Inquiry program (P13400).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Equipment<br>• Manufacturer<br>• Product Family<br>• Product Model |
| Number of Overdue PMs (P13570X\|W13570XA) | Use this chart to view the number of preventative maintenance that are currently overdue.<br>This chart is based on the One View PM Analysis program (P13570).<br>You can select one of these options:<br>• Assigned To<br>• Service Type |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

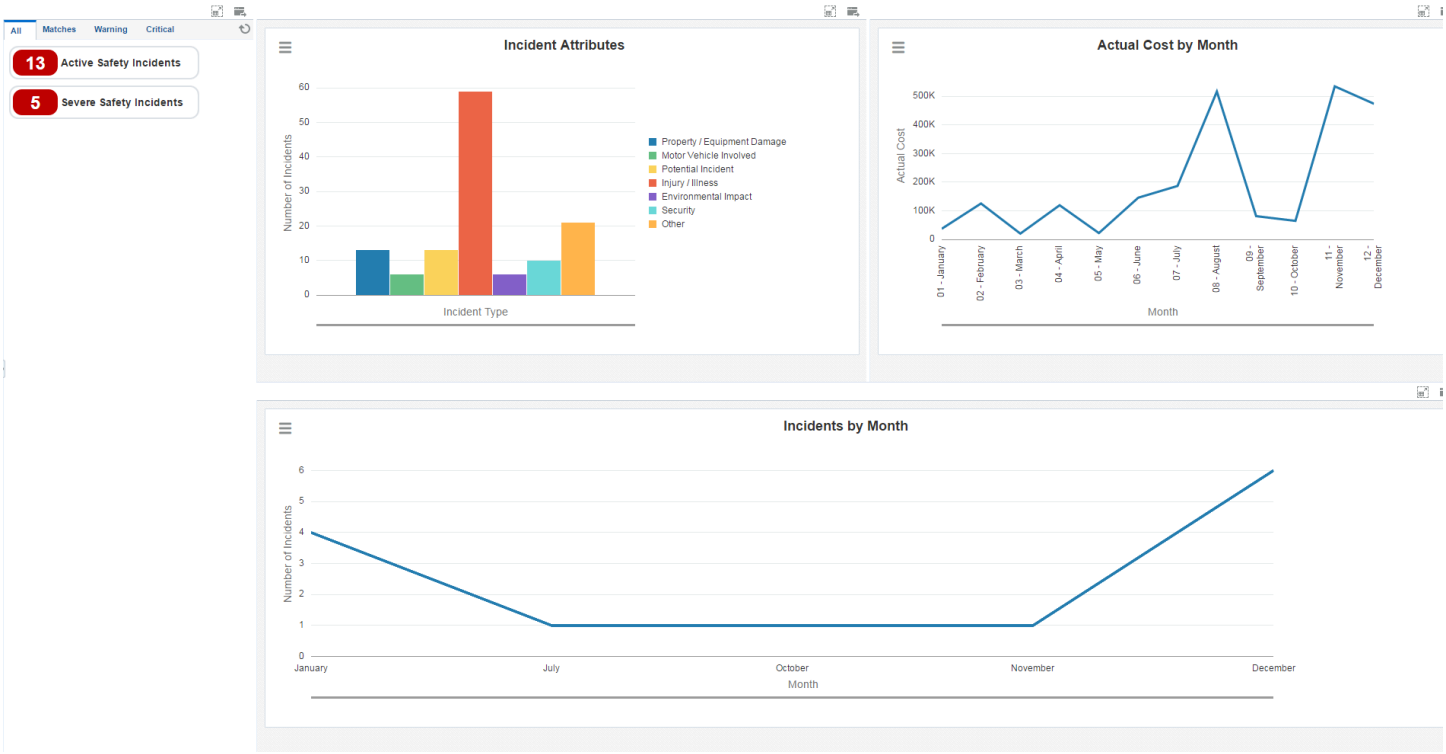
- *One View PM Analysis (P13570)*
- *One View Equipment Status Inquiry (P13400)*
- *One View PM Analysis (P13570)*

# UX One: Plant Safety Page

The Plant Safety page (P31001X|W31001XC) enables users to receive alerts about active and severe safety incidents associated with their team. The page also provides analytical data about the type, cost, and number of incidents associated with the team.

To access the UX One Plant Safety page, log in to the EnterpriseOne system using the Plant Manager role. When you log in with this role, the system automatically displays the Plant Manager page. Click the Plant Safety task on the springboard to access the Plant Safety page.

This graphic illustrates the Plant Safety page:


All
Matches
Warning
Critical
13
Active Safety Incidents
5
Severe Safety Incidents
Incident Attributes
Number of Incidents
Incident Type
Property / Equipment Damage
Motor Vehicle Involved
Potential Incident
Injury / Illness
Environmental Impact
Security
Other
Actual Cost by Month
Actual Cost
Month
Incidents by Month
Number of Incidents
January
July
October
November
December
Month

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Plant Safety page:

| Watchlist Alert | Description |
|---|---|
| Active Safety Incidents | This alert tells users the number of active safety incidents currently associated with their team.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br>• Review Incidents<br>The following grid format is available:<br>• Simple |
| Severe Safety Incidents | This alert tells users the number of severe safety incidents currently associated with their team.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br>When you click the alert, the system displays the One View Incident Summary Inquiry form. The following form layout is available:<br>• Review Incidents<br>The following grid format is available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see *One View Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Plant Safety page:

| Component Title | Description |
|---|---|
| Incident Attributes (P54HS22X/ W54HS22XD) | Use this chart to view the total number of incidents for your team.<br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |

| Component Title | Description |
|---|---|
| Actual Cost by Month (P54HS22X\|W54HS22XB) | Use this chart to view the cost by month of the incidents for your team.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Incidents by Month (P54HS22X\|W54HS22XA) | Use this chart to view the number of incidents for your team by month.<br><br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |

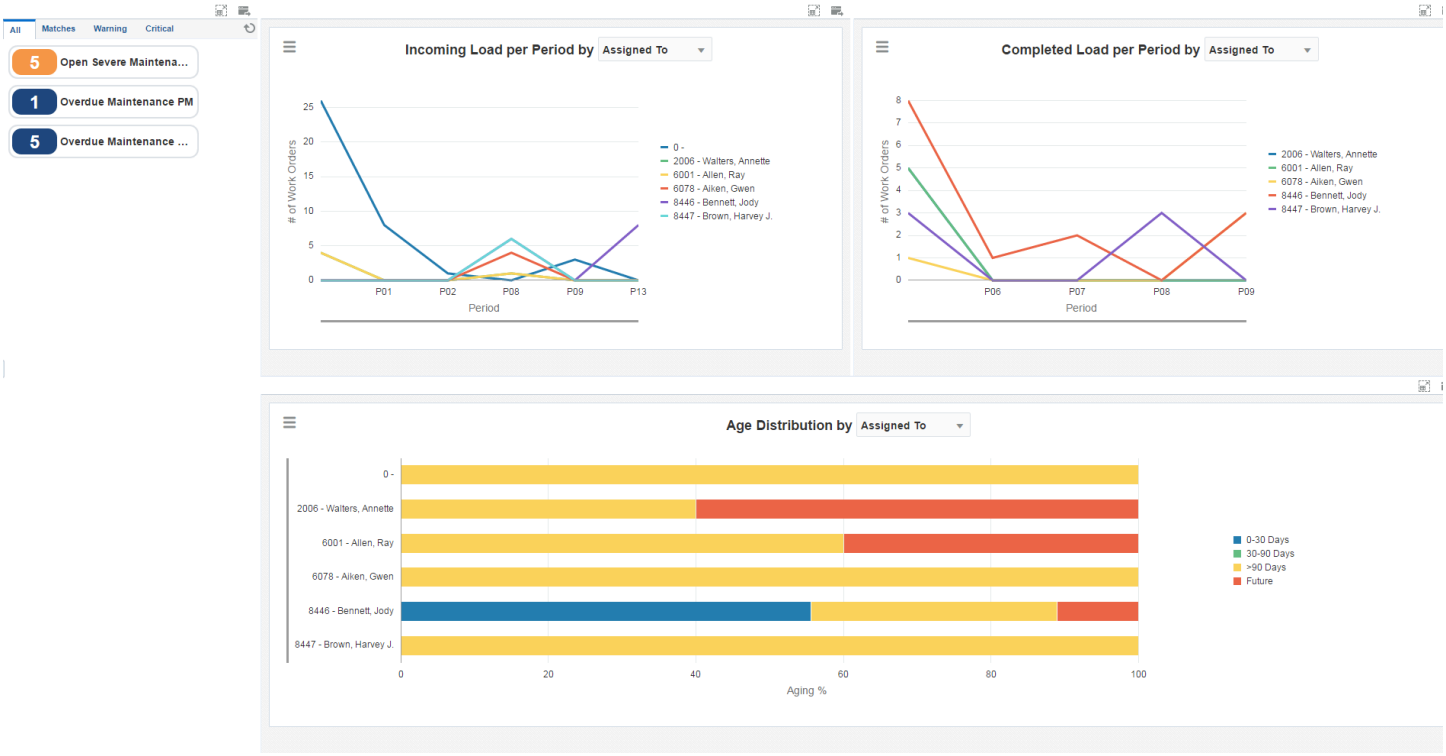
For additional information about the programs associated with these charts, see *One View Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# UX One: Maintenance Work Order Load Page

The Maintenance Work Order Load page (P13003X|W13003XB) enables users to receive alerts about overdue work orders and preventive maintenance records that need attention. The page also provides analytical data about the incoming and completed work load, and aging statistics for the maintenance team.

To access the UX One Maintenance Work Order Load page, log in to the EnterpriseOne system using the Plant Manager role. When you log in with this role, the system automatically displays the Plant Manager page. Click the Maintenance Work Order Load task on the springboard to access the Maintenance Work Order Load page.

This graphic illustrates the Maintenance Work Order Load page:


All
Matches
Warning
Critical
5
Open Severe Maintena...
1
Overdue Maintenance PM
5
Overdue Maintenance ...
Incoming Load per Period by
Assigned To
# of Work Orders
Period
P01
P02
P08
P09
P13
0 -
2006 - Walters, Annette
6001 - Allen, Ray
6078 - Aiken, Gwen
8446 - Bennett, Jody
8447 - Brown, Harvey J.
Completed Load per Period by
Assigned To
# of Work Orders
Period
P06
P07
P08
P09
2006 - Walters, Annette
6001 - Allen, Ray
6078 - Aiken, Gwen
8446 - Bennett, Jody
8447 - Brown, Harvey J.
Age Distribution by
Assigned To
0 -
2006 - Walters, Annette
6001 - Allen, Ray
6078 - Aiken, Gwen
8446 - Bennett, Jody
8447 - Brown, Harvey J.
Aging %
0-30 Days
30-90 Days
>90 Days
Future

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Maintenance Work Order Load page:

| Watchlist Alert | Description |
|---|---|
| Open Severe Maintenance Alerts | This alert tells users the number of open severe maintenance alerts currently associated with their team.<br><br>This alert is based on the Work with Condition-Based Alerts program (P1310).<br><br>When you click the alert, the system displays the Work With Condition-Based Alerts form. The following grid format is available:<br><br>• Basic |
| Overdue Maintenance PMs | This alert tells users the number of preventive maintenance records that are currently overdue.<br><br>This alert is based on the PM Backlog program (P12071).<br><br>When you click the alert, the system displays the PM Backlog form. |
| Overdue Maintenance WOs | This alert tells users the number of work orders thar are currently overdue.<br><br>This alert is based on the Search for Equipment Work Orders program (P13700).<br><br>When you click the alert, the system displays the Search for Equipment Work Orders form. The following form layout is available:<br><br>• Equipment WOs<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Creating Work Orders Using the Planning Workbench Program (P13700)* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Maintenance Work Order Load page:

| Component Title | Description |
|---|---|
| Incoming Load Per Period (P13560X\|W13560XC) | Use this chart to view the incoming work order load for the period.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor<br>• Business Unit |
| Completed Load Per Period (P13560X\|W13560XE) | Use this chart to view the completed work order load for the period.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor<br>• Business Unit |
| Age Distribution (P13560X\|W13560XB) | Use this chart to view work order aging information.<br>This chart is based on the One View Equipment Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Business Unit<br>• Supervisor<br>• WO Type |

For additional information about the programs associated with these charts, see *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# 37 Manufacturing Roles: Production Manager (Release 9.2 Update)

## Understanding the Production Manager UX One Role

The Production Manager role, and the associated UX One pages and components, enable users to:

- Better plan, coordinate, and control manufacturing processes.
- Ensure that goods and services are produced efficiently at the right cost and quality standards.

The Production Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Production Manager role (PRODMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the PRODMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Production Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the following JD Edwards EnterpriseOne Application guides:

- *JD Edwards EnterpriseOne Applications Product Costing and Manufacturing Implementation Guide*
- *JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide*
- *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*
- *JD Edwards EnterpriseOne Applications Quality Management Implementation Guide*

- *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*

# Using the Production Manager UX One Role

You use the Production Manager role to access the Production Manager (P31002X|W31002XA) UX One page.

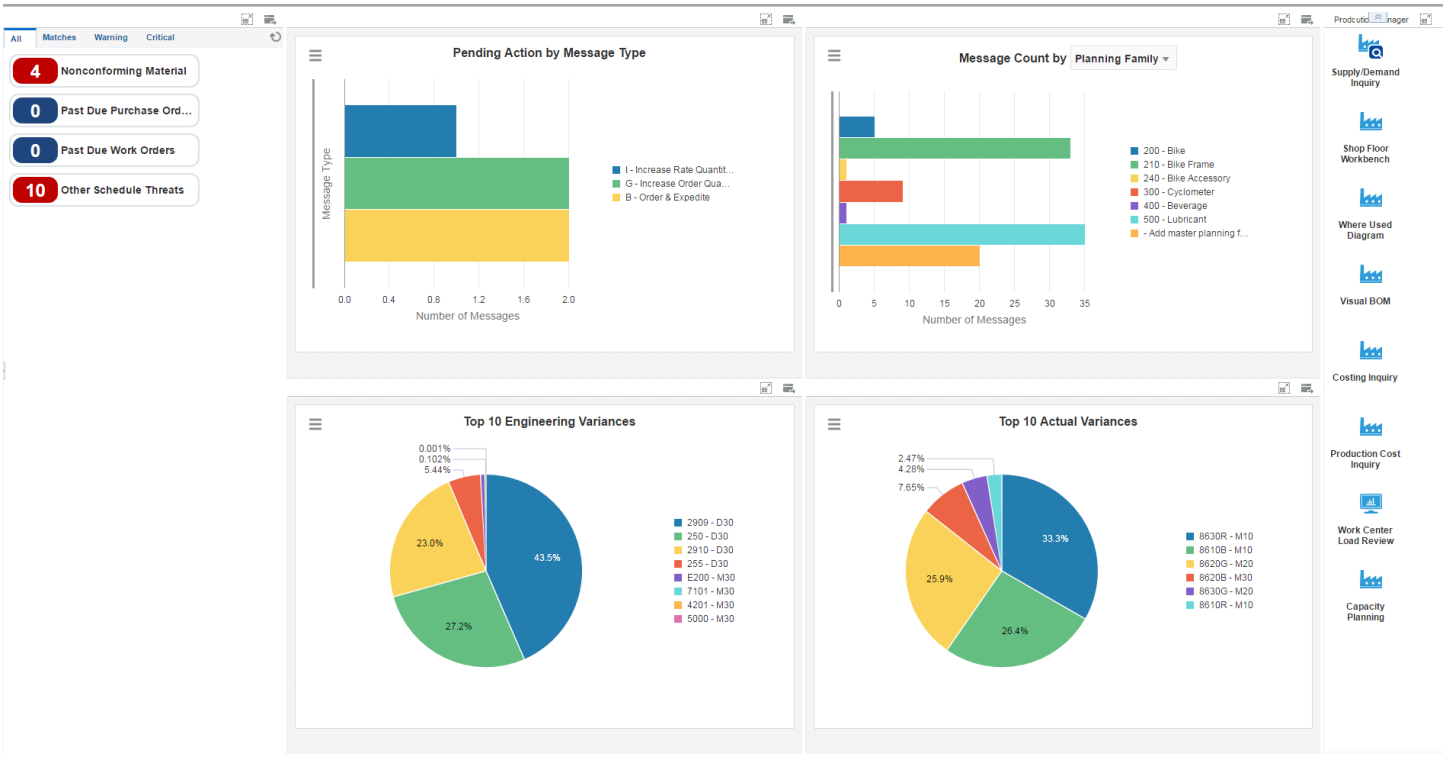
## UX One: Production Manager Page

The Production Manager page (P31002X|W31002XA) enables users to:

- Receive alerts regarding nonconforming material and purchase orders and work orders that are past their due dates.
- Analyze required actions based on message type, message count, and engineering and actual variances.
- Act quickly by easily accessing the Production Management programs.

To access the UX One Production Manager page, log in to the EnterpriseOne system using the Production Manager role.

This graphic illustrates the Production Manager page:


All
Matches
Warning
Critical
4
Nonconforming Material
0
Past Due Purchase Ord...
0
Past Due Work Orders
10
Other Schedule Threats
Pending Action by Message Type
Message Type
I - Increase Rate Quantit...
G - Increase Order Qua...
B - Order & Expedite
0.0
0.4
0.8
1.2
1.6
2.0
Number of Messages
Message Count by
Planning Family
200 - Bike
210 - Bike Frame
240 - Bike Accessory
300 - Cyclometer
400 - Beverage
500 - Lubricant
- Add master planning f...
0
5
10
15
20
25
30
35
Number of Messages
Top 10 Engineering Variances
0.001%
0.102%
5.44%
23.0%
43.5%
27.2%
2909 - D30
250 - D30
2910 - D30
255 - D30
E200 - M30
7101 - M30
4201 - M30
5000 - M30
Top 10 Actual Variances
2.47%
4.28%
7.65%
25.9%
33.3%
26.4%
8630R - M10
8610B - M10
8620G - M20
8620B - M30
8630G - M20
8610R - M10
Supply/Demand Inquiry
Shop Floor Workbench
Where Used Diagram
Visual BOM
Costing Inquiry
Production Cost Inquiry
Work Center Load Review
Capacity Planning

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Production Manager page:

| Watchlist Alert | Description |
|---|---|
| Nonconforming Material | This alert tells users the number of test failures waiting for disposition.<br><br>This alert is based on the Work With Nonconforming Test Results program (P3703).<br><br>When you click the alert, the system displays the Work With Nonconforming Test Results form. The following form layout is available:<br><br>• Supply and Demand Inquiry |
| Past Due Purchase Orders | This alert tells users the number of purchase orders that are past their due date.<br><br>This alert is based on the One View Planning Analysis Inquiry program (P48290).<br><br>When you click the alert, the system displays the past due purchase orders on the One View Planning Analysis Inquiry form. The following form layout is available:<br><br>• Where Used Diagram<br>The following grid format is available:<br><br>• Simple |
| Past Due Work Orders | This alert tells users the number of work orders that are past their due dates.<br><br>This alert is based on the One View Planning Analysis Inquiry program (P48290).<br><br>When you click the alert, the system displays the past due work orders on the One View Planning Analysis Inquiry form. The following form layout is available:<br><br>• Where Used Diagram<br>The following grid format is available:<br><br>• Simple |
| Other Schedule Threats | This alert tells users the number of scheduled threats other than past due orders.<br><br>This alert is based on the One View Planning Analysis Inquiry program (P48290).<br><br>When you click the alert, Order & Expedite, Expedite, and Increase message types are displayed on the One View Planning Analysis Inquiry form. The following form layout is available:<br><br>• Where Used Diagram<br>The following grid format is available:<br><br>• Simple |

For additional information about the programs accessed by these watchlist alerts, see *One View Planning Analysis Inquiry (P48290)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*.

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Production Manager page:

| Component Title | Description |
|---|---|
| Pending Action by Message Type (P48290X\|W48920XB) | Use this chart to review the action to be taken based on the message type.<br>This chart is based on the One View Planning Analysis Inquiry program (P48290). |
| Message Count (P48290X\|W48920XC) | Use this chart to review the number of messages received in the last seven days.<br>This chart is based on the One View Planning Analysis Inquiry program (P48290).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select from these options:<br>• Buyer<br>• Planner<br>• Planning Family |
| Top 10 Engineering Variances (P48270X\|W48270XA) | Use this chart to view the top 10 engineering variances by item and branch/plant.<br>This chart is based on the One View Work Order Cost Analysis Inquiry program (P48270). |
| Top 10 Actual Variances (P48270X\|W48270XC) | Use this chart to view the top 10 actual variances by item and branch/plant.<br>This chart is based on the One View Work Order Cost Analysis Inquiry program (P48270). |

For additional information about the programs accessed by these charts, see *Setting Processing Options for Receipts Review/Interim Payments (P40G200)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Production Manager page:

| Task | Description |
|---|---|
| Supply/Demand Inquiry | Use this task to access the Supply/Demand Inquiry - Work with Supply and Demand program (P4021). |
| Shop Floor Workbench | Use this task to access the Shop Floor Workbench - Work With Order Scheduling program (P31225). |

| Task | Description |
|---|---|
| | |
| Where Used Diagram | Use this task to access the Where Used Diagram<br><br>See *Viewing Item Information in the Where Used Diagram* in the *JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* . |
| Visual BOM | Use this task to access the Visual Bill of Material<br><br>See *Setting Processing Options for Visual Bill of Material (P30003X)* in the *JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* . |
| Costing Inquiry | Use this task to access the Costing Inquiry - Work With Costed Bill program (P30206).<br><br>The following form layout is available:<br><br>• Costing Inquiry<br>The following grid format is available:<br><br>• Basic |
| Production Cost Inquiry | Use this task to access the Production Cost Inquiry - Production Cost Inquiry program (P31022). |
| Work Center Load Review | Use this task to access the Work Center Load Review (E313000).<br><br>See *Setting Processing Options for the Work Center Load Review Calendar Program (PE313000)* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* . |
| Capacity Planning | Use this task to access the Capacity Planning - Work With Capacity Message Summary program (P3301).<br><br>The following form layout is available:<br><br>• Capacity Planning |

For additional information about the programs accessed by these tasks, see these topics:

- *Managing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*
- *Using WOrk Order Scheduling and Rate Schedules* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*
- *Working with Product Costing* in the *JD Edwards EnterpriseOne Applications Product Costing and Manufacturing Implementation Guide*
- *Working with the Manufacturing Accounting System* in the *JD Edwards EnterpriseOne Applications Product Costing and Manufacturing Implementation Guide*
- *Planning Production Capacity* in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*

# 38 Manufacturing Roles: Production Scheduler (Release 9.2 Update)

## Understanding the Production Scheduler UX One Role

The Production Scheduler role, and the associated UX One pages and components, enable users to:

- View a summary of the requirements planning messages.
- Easily validate the master production schedule.
- Respond quickly to exception conditions.

The Production Scheduler pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Production Scheduler role (PRODSCHJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the PRODSCHJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Production Scheduler role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the following JD Edwards EnterpriseOne Application guides:

- *JD Edwards EnterpriseOne Applications Product Costing and Manufacturing Implementation Guide*
- *JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide*
- *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*

- *JD Edwards EnterpriseOne Applications Quality Management Implementation Guide*
- *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*

# Using the Production Scheduler UX One Role

You use the Production Scheduler role to access the Production Scheduler (P34001X|W34001XA) UX One page.

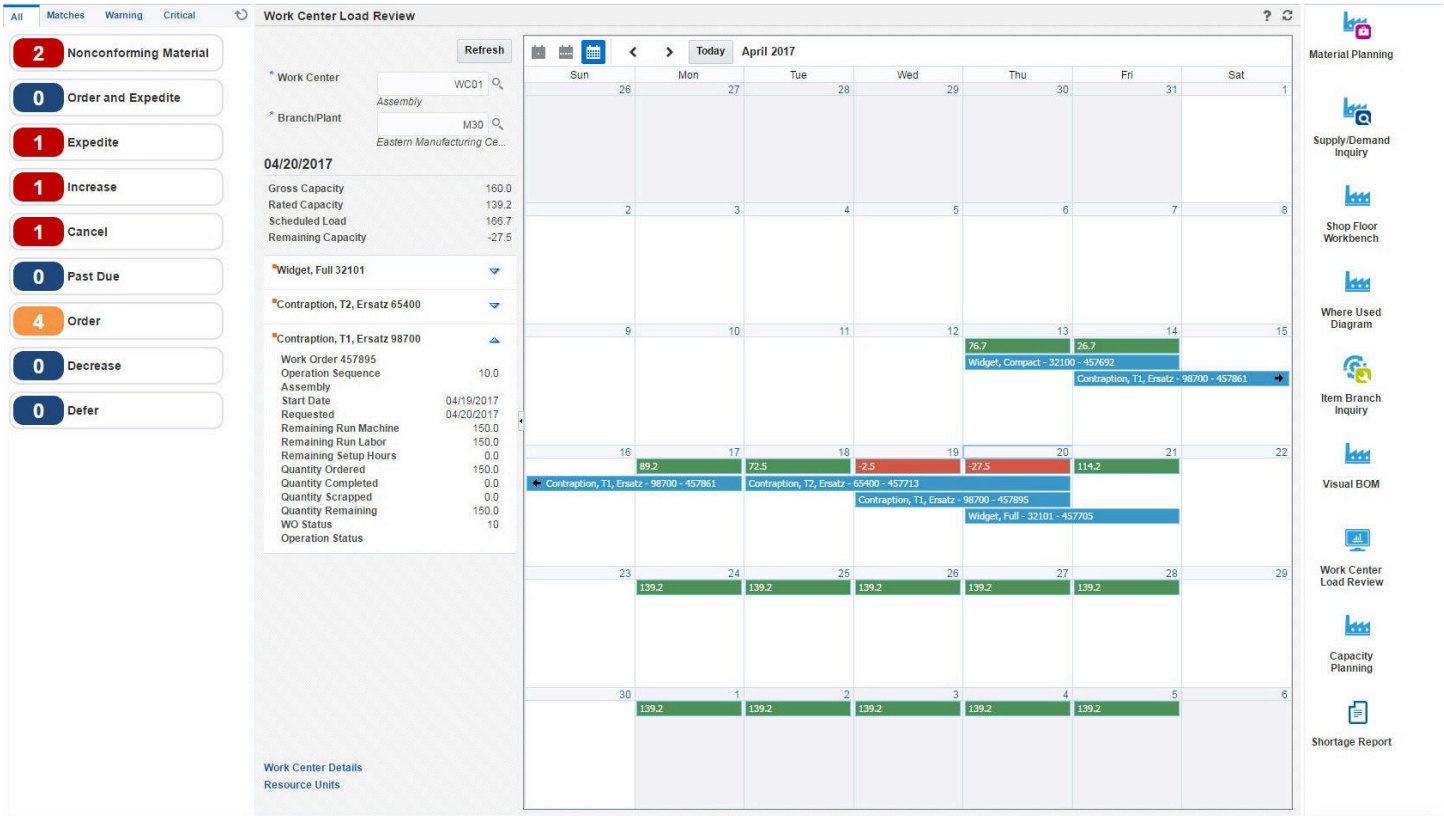
## UX One: Production Scheduler Page

The Production Scheduler page (P34001X|W34001XA) enables users to:

- Monitor nonconforming materials and take corrective measures.
- View a summary of MRP messages and act upon them.
- View scheduled operations and remaining capacity for any work center and take action to correct overcapacity conditions.

To access the UX One Production Scheduler page, log in to the EnterpriseOne system using the Production Scheduler role.

This graphic illustrates the Production Scheduler page:


All
Matches
Warning
Critical
2 Nonconforming Material
0 Order and Expedite
1 Expedite
1 Increase
1 Cancel
0 Past Due
4 Order
0 Decrease
0 Defer
Work Center Load Review
Refresh
* Work Center
WC01
Assembly
* Branch/Plant
M30
Eastern Manufacturing Ce...
04/20/2017
Gross Capacity 160.0
Rated Capacity 139.2
Scheduled Load 166.7
Remaining Capacity -27.5
Widget, Full 32101
Contraption, T2, Ersatz 65400
Contraption, T1, Ersatz 98700
Work Order 457895
Operation Sequence 10.0
Assembly
Start Date 04/19/2017
Requested 04/20/2017
Remaining Run Machine 150.0
Remaining Run Labor 150.0
Remaining Setup Hours 0.0
Quantity Ordered 150.0
Quantity Completed 0.0
Quantity Scrapped 0.0
Quantity Remaining 150.0
WO Status 10
Operation Status
Work Center Details
Resource Units
Today
April 2017
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Widget, Compact - 32100 - 457692
Contraption, T1, Ersatz - 98700 - 457861
Contraption, T2, Ersatz - 65400 - 457713
Contraption, T1, Ersatz - 98700 - 457895
Widget, Full - 32101 - 457705
Material Planning
Supply/Demand Inquiry
Shop Floor Workbench
Where Used Diagram
Item Branch Inquiry
Visual BOM
Work Center Load Review
Capacity Planning
Shortage Report

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Production Scheduler page:

| Watchlist Alert | Description |
|---|---|
| Nonconforming Material | This alert tells users the number of test failures waiting for disposition.<br><br>This alert is based on the Work With Nonconforming Test Results program (P3703).<br><br>When you click the alert, the system displays the Work With Nonconforming Test Results form. The following form layout is available:<br><br>• Supply and Demand Inquiry |
| Order and Expedite | This alert tells users the number of messages of the order and expedite type that are not processed.<br><br>This alert is based on the Work With Detail Messages program (P3411).<br><br>When you click the alert, the system displays the Work With Detail Messages form. The following form layout is available:<br><br>• Messages with Time Series |
| Expedite | This alert tells users the number of messages of the expedite type that are not processed.<br><br>This alert is based on the Work With Detail Messages program (P3411).<br><br>When you click the alert, the system displays the Work With Detail Messages form. The following form layout is available:<br><br>• Messages with Time Series |
| Increase | This alert tells users the number of messages of the increase rate quantity and order quantity type that are not processed.<br><br>This alert is based on the Work With Detail Messages program (P3411).<br><br>When you click the alert, the system displays the Work With Detail Messages form. The following form layout is available:<br><br>• Messages with Time Series |
| Cancel | This alert tells users the number of messages of the cancel type that are not processed.<br><br>This alert is based on the Work With Detail Messages program (P3411).<br><br>When you click the alert, the system displays the Work With Detail Messages form. The following form layout is available:<br><br>• Messages with Time Series |
| Past Due | This alert tells users the number of messages of the past due order type that are not processed. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Work With Detail Messages program (P3411).<br><br>When you click the alert, the system displays the Work With Detail Messages form. The following form layout is available:<br><br>• Messages with Time Series |
| Order | This alert tells users the number of messages of the order type that are not processed.<br><br>This alert is based on the Work With Detail Messages program (P3411).<br><br>When you click the alert, the system displays the Work With Detail Messages form. The following form layout is available:<br><br>• Messages with Time Series |
| Decrease | This alert tells users the number of messages of the decrease rate quantity and order quantity type that are not processed.<br><br>This alert is based on the Work With Detail Messages program (P3411).<br><br>When you click the alert, the system displays the Work With Detail Messages form. The following form layout is available:<br><br>• Messages with Time Series |
| Defer | This alert tells users the number of messages of the defer type that are not processed.<br><br>This alert is based on the Work With Detail Messages program (P3411).<br><br>When you click the alert, the system displays the Work With Detail Messages form. The following form layout is available:<br><br>• Messages with Time Series |

### Work Center Load Review

The Work Center Load Review calendar provides visibility to schedulers regarding the scheduled work order load and the available capacity at a work center.d

This table lists and describes the charts that are available on the Production Scheduler page:

| Component Title | Description |
|---|---|
| Work Center Load Review Calendar (E313000) | This component displays the Work Center Load Review (E313000).<br><br>See *Managing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* . |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Production Scheduler page:

| Task | Description |
|---|---|
| Material Planning | Use this task to access the Material Planning - Work With Detail Messages program (P3411).<br>The following form layout is available:<br>• Messages with Time Series |
| Supply/Demand Inquiry | Use this task to access the Supply/Demand Inquiry - Work with Supply and Demand program (P4021). |
| Shop Floor Workbench | Use this task to access the Shop Floor Workbench - Work With Order Scheduling program (P31225). |
| Where Used Diagram | Use this task to access the Where Used Diagram.<br>See *Using the Where Used Diagram (Release 9.2 Update)* in the *JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* . |
| Item Branch Inquiry | Use this task to access the Item Branch Inquiry - Work With Item Branch program (P41026).<br>The following form layout is available:<br>• Planning Parameters<br>The following grid format is available:<br>• Basic |
| Visual BOM | Use this task to access the Visual Bill of Material<br>See *Using the Visual Bill of Material (Release 9.2 Update)* in the *JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* . |
| Work Center Load Review | Use this task to access the Work Center Load Review (E313000).<br>See *Managing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* . |
| Capacity Planning | Use this task to access the Capacity Planning - Work With Capacity Message Summary program (P3301).<br>The following form layout is available:<br>• Capacity Planning |
| Shortage Report | Use this task to access the Component Shortage List report (R3148). |

For additional information about the programs accessed by these tasks, see these topics:

- *Managing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*
- *Using Work Order Scheduling and Rate Schedules* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide*

- *Working with Product Costing* in the *JD Edwards EnterpriseOne Applications Product Costing and Manufacturing Implementation Guide*
- *Working with the Manufacturing Accounting System* in the *JD Edwards EnterpriseOne Applications Product Costing and Manufacturing Implementation Guide*
- *Planning Production Capacity* in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*
- *Entering Item Information* in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*

# 39 Outbound Inventory Management Roles: VMI Account Manager

## Understanding the VMI Account Manager UX One Role

The VMI Account Manager role, and the associated UX One pages and components, enable you to manage and monitor vendor-managed inventory (VMI) stock levels through real-time visibility to inventory data.

The VMI Account Manager is responsible for monitoring the target and current stock levels at the customer's warehouse regularly to ensure that every item reaches its destination on time and there are no inventory shortages. Other responsibilities of the VMI Account Manager include creating and updating replenishment schedules, identifying dead inventory at the customer's location, and initiating replenishment of stock, if required.

You can use the VMI Account Manager role to monitor and evaluate the inventory stock levels at the customer's warehouse. You can analyze the inventory consumption patterns to forecast supply and demand, and review the distribution of consigned inventory. Additionally, you can take any necessary action by accessing related applications.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the VMI Account Manager role (VMIACMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the VMIACMRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the VMI Account Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Outbound Inventory Management*.

# Using the VMI Account Manager UX One Role

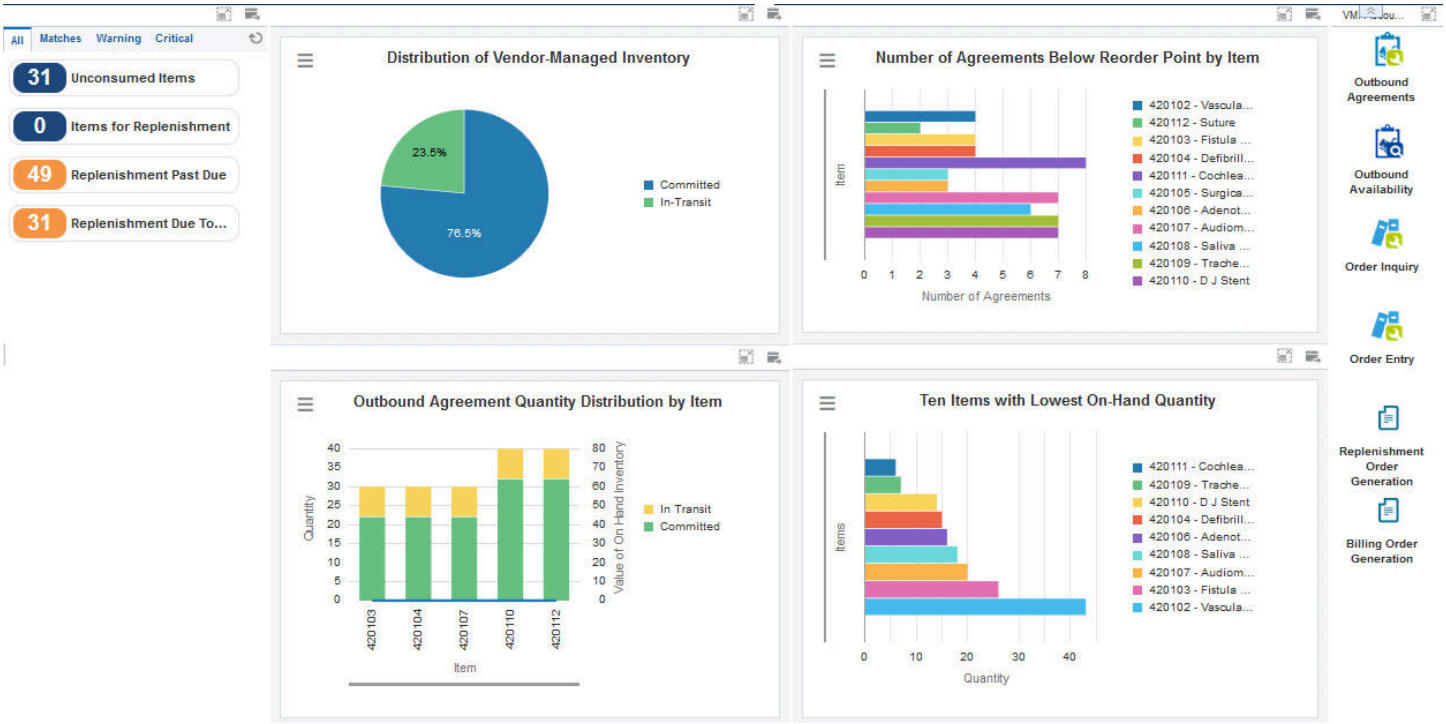
You use the VMI Account Manager role to access the VMI Account Manager page (P42I002X|W42I002XA).

## UX One: VMI Account Manager Page

The VMI Account Manager page (P42I002X|W42I002XA) enables you to receive alerts related to vendor-managed inventory stock levels, review and analyze the distribution of vendor-managed inventory, and access applications to perform tasks that require immediate attention. For example, if you receive a watchlist alert that tells you that the number of items with an age of inventory of more than 50 days has crossed the critical threshold, you can access the Outbound Inventory Availability program (P42I04) and review the age of inventory for an item at a customer's location.

To access the UX One VMI Account Manager page, log in to the EnterpriseOne system using the VMI Account Manager role.

This graphic illustrates the VMI Account Manager page:




## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the VMI Account Manager page:

| Watchlist Alert | Description |
| --- | --- |
| (Release 9.2 Update) Unconsumed Items | This alert tells you the number of items for which the age of inventory is more than 50 days. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the One View Outbound Inventory Valuation program (P42I271, version ZJDE0002).<br><br>When you click the alert, the system displays the One View Outbound Inventory Valuation Inquiry form. The following form layout is available:<br><br>• Age of Inventory<br>The following grid formats are available:<br><br>• Age of Inventory<br>• Age of Inventory Details<br>• who is who |
| (Release 9.2 Update) Items for Replenishment | This alert tells you the number of items for which the promised delivery date is between the current date and the next five days.<br><br>This alert is based on the One View Outbound Inventory Valuation program (P42I271, version ZJDE0003).<br><br>When you click the alert, the system displays the One View Outbound Inventory Valuation Inquiry form. The following form layout is available:<br><br>• Age of Inventory<br>The following grid formats are available:<br><br>• Replenishment Details<br>• who is who |
| Replenishment Past Due | This alert tells you the number of items for which the promised delivery date is less than the current date.<br><br>This alert is based on the One View Outbound Inventory Valuation program (P42I271, version ZJDE0003).<br><br>(Release 9.2 Update) When you click the alert, the system displays the One View Outbound Inventory Valuation Inquiry form. The following form layout is available:<br><br>• Age of Inventory<br>The following grid formats are available:<br><br>• Replenishment Details<br>• who is who |
| Replenishment Due Today | This alert tells you the number of items for which the promised delivery date is equal to the current date.<br><br>This alert is based on the One View Outbound Inventory Valuation program (P42I271, version ZJDE0003).<br><br>(Release 9.2 Update) When you click the alert, the system displays the One View Outbound Inventory Valuation Inquiry form. The following form layout is available:<br><br>• Age of Inventory<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • Replenishment Details<br>• who is who |

For additional information about the program associated with these watchlist alerts, see *One View Outbound Inventory Valuation Inquiry (P42I271)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the VMI Account Manager page:

| Component Title | Description |
|---|---|
| Distribution of Vendor-Managed Inventory (P42I04X\|W42I04XH) | Use this chart to view the quantity distribution of vendor-managed inventory for the following types of quantity:<br>• On Hand<br>• In Transit<br>• On Hold<br>• Committed<br>• Consumed<br>• On Return<br>This chart is based on the Outbound Availability - F42I021, F38010, F38011, F42I011 business view (V42I021B). |
| Number of Agreements Below Reorder Point by Item (P42I04X\|W42I04XF) | Use this chart to view the number of agreements below the reorder point threshold for different items. The reorder point threshold is hard-coded as 90%.<br>**Note:** The system considers the committed and in-transit quantity in calculating the number of agreements.<br>This chart is based on the Outbound Availability - F42I021, F38010, F38011, F42I011 business view (V42I011A). |
| Outbound Agreement Quantity Distribution by Item (P42I04X\|W42I04XG) | Use this chart to view the distribution of outbound agreement quantity for the following types of quantity:<br>• On Hand<br>• In Transit<br>• On Hold<br>• Committed<br>• Consumed<br>• On Return<br>This chart is based on the Outbound Availability - F42I021, F38010, F38011, F42I011 business view (V42I021B). |

| Component Title | Description |
|---|---|
| | |
| Ten Items with Lowest On-Hand Quantity (P42I04X\|W42I04XD) | Use this chart to view the top 10 items with the lowest on-hand quantity.<br><br>This chart is based on the Outbound Availability - F42I021, F38010, F38011, F42I011 business view (V42I021B). |

For additional information about the program associated with these charts, see *Outbound Inventory Availability* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the VMI Account Manager page:

| Task | Description |
|---|---|
| Outbound Agreements | Use this task to access the Outbound Inventory Agreement Master program (P42I010, version ZJDE0002).<br><br>(Release 9.2 Update) The following form layout is available:<br><br>• Outbound Agreement Details<br>The following grid format is available:<br><br>• Outbound Agreement Details |
| Outbound Availability | Use this task to access the Outbound Inventory Availability program (P42I04). |
| Order Inquiry | Use this task to access the Outbound Inventory Agreement Selection program (P42I01). |
| Order Entry | Use this task to access the Sales Order Entry program (P42101). |
| Replenishment Order Generation | Use this task to access the Batch Versions program (P98305W) from where you can run the Generate Outbound Replenishment Order report (R42I30). |
| Billing Order Generation | Use this task to access the Batch Versions program (P98305W) from where you can run the Generate Outbound Billing Order report (R42I20). |

For additional information about the programs accessed by these tasks, see:

- *Creating Outbound Inventory Agreements* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*
- *Outbound Inventory Availability* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*
- *Entering Sales Order Header and Detail Information* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*

- *Generating Replenishment Orders* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*
- *Billing for Internally Owned Shipments* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*

# 40 Outbound Inventory Management Roles: VMI Agreement Manager

## Understanding the VMI Agreement Manager UX One Role

The VMI Agreement Manager role, and the associated UX One pages and components, enable users to manage and track vendor-managed inventory (VMI) agreements effectively through enhanced visibility to consigned or vendor-managed inventory agreement and inventory data.

By using the VMI Agreement Manager role, you can monitor the progress and performance of contracts to ensure that goods conform to the requirements. You can analyze agreements, identify potential problems, and provide timely resolution. Additionally, you can approve exceptions such as a change in the standard replenishment quantity or additional discounts.

The VMI Agreement Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the VMI Agreement Manager role (VMIAGMRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the VMIAGMRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the VMI Agreement Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards*

*EnterpriseOne Applications Outbound Inventory Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Outbound Inventory Management*.

# Using the VMI Agreement Manager UX One Role

You use the VMI Agreement Manager role to access the VMI Agreement Manager page (P42I001X|W42I001XA).

## UX One: VMI Agreement Manager Page

The VMI Agreement Manager page enables you to view alerts for the agreements that require immediate attention, and approve or update price and quantity overrides. Additionally, you can view the volume of VMI business and inventory condition at the customer's location. The VMI Agreement Manager page also provides easy access to VMI contracts and availability.

To access the UX One VMI Agreement Manager page, log in to the EnterpriseOne system using the VMI Agreement Manager role.

This graphic illustrates the VMI Agreement Manager page:

**Watchlist Alerts**

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the VMI Agreement Manager page:

| Watchlist Alert | Description |
|---|---|
| Expiring Agreements | This alert tells you how many agreement detail lines will expire over a period of time.<br><br>This alert is based on the One View Outbound Agreement Inquiry program (P42I270, version ZJDE0002).<br><br>(Release 9.2 Update) When you click the alert, the system displays the One View Outbound Agreement Inquiry form. The following form layout is available:<br><br>• Expiring and Expired Agreement<br>The following grid formats are available:<br><br>• Expiring and Expired Agreement<br>• Agreement Details<br>• Closed Agreement<br>• who is who |
| Expired Agreements | This alert tells you how many agreement detail lines have expired over a period of time.<br><br>This alert is based on the One View Outbound Agreement Inquiry program (P42I270, version ZJDE0002).<br><br>(Release 9.2 Update) When you click the alert, the system displays the One View Outbound Agreement Inquiry form. The following form layout is available:<br><br>• Expiring and Expired Agreement<br>The following grid formats are available:<br><br>• Expiring and Expired Agreement<br>• Agreement Details<br>• Closed Agreement<br>• who is who |
| Closed Agreements | This alert tells you how many agreements were closed over a period of time.<br><br>This alert is based on the Outbound Inventory Agreement Master program (P42I010, version ZJDE0002).<br><br>(Release 9.2 Update) When you click the alert, the system displays the Work With Outbound Inventory Agreement Master form. The following form layouts are available:<br><br>• Outbound Agreement Details<br>• Closed Agreement<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • (Release 9.2 Update) Outbound Agreement Details<br>• Agreement Details<br>• Closed Agreement<br>• who is who |
| (Release 9.2 Update) Price Approvals | This alert tells you how many consumption lines are pending approval for price overrides.<br><br>This alert is based on the Work With Outbound Inventory Quantity and Price Override Approvals program (P42I08, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Outbound Inventory Quantity and Price Override Approvals form. The following form layouts are available:<br><br>• Awaiting Price Override app<br>• Quantity and Price Override<br>The following grid formats are available:<br><br>• Awaiting Price Override App<br>• Price and Quantity Override<br>• who is who |
| (Release 9.2 Update) Quantity Approvals | This alert tells you how many consumption lines are pending approval for quantity overrides.<br><br>This alert is based on the Work With Outbound Inventory Quantity and Price Override Approvals program (P42I08, version ZJDE0003).<br><br>When you click the alert, the system displays the Work With Outbound Inventory Quantity and Price Override Approvals form. The following form layout is available:<br><br>• Quantity and Price Override<br>The following grid format is available:<br><br>• Price and Quantity Override |

For additional information about the programs associated with these watchlist alerts, see:

- *One View Outbound Agreement Inquiry (P42I270)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Approving Replenishment Quantity and Price Overrides* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*
- *Creating Outbound Inventory Agreements* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*
- *Approving Replenishment Quantity and Price Overrides* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the VMI Agreement Manager page:

| Component Title | Description |
|---|---|
| Expiring Outbound Agreements by Period (P42I270X\|W42I270XB) | Use this chart to view the number and value of outbound agreements that will expire over a period of time.<br><br>This chart is based on the One View Outbound Agreement Inquiry program (P42I270). |
| Consumed Quantity vs. Remaining Quantity by Customer (P42I04X\|W42I04XB) | Use this chart to compare the consumed quantity with the remaining quantity available for consumption at a customer's location for each customer.<br><br>The system uses this formula to calculate the remaining quantity:<br><br>Remaining Quantity = Agreement Quantity - (sum of On Hand Quantity + sum of Committed Quantity + sum of In Transit Quantity + sum of Consumed Quantity) for the customer<br><br>The system uses the Primary Unit of Measure for the quantities.<br><br>This chart is based on the Outbound Availability - F42I021, F38010, F38011, F42I011 business view (V42I021B). |
| Closed Outbound Agreements by Customer (P42I270X\|W42I270XC) | Use this chart to view the number and value of closed outbound agreements for each customer.<br><br>This chart is based on the One View Outbound Agreement Inquiry program (P42I270). |
| Top 10 Customers Based on Estimated Agreement Value (P42I270X\|W42I270XA) | Use this chart to view the top 10 customers based on the estimated agreement value.<br><br>This chart is based on the One View Outbound Agreement Inquiry program (P42I270). |

For additional information about the programs associated with these charts, see:

- *Outbound Inventory Availability* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*
- *One View Outbound Agreement Inquiry (P42I270)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the VMI Agreement Manager page:

| Task | Description |
|---|---|
| Outbound Agreement Master | Use this task to access the Outbound Inventory Agreement Master program (P42I010).<br><br>(Release 9.2 Update) The following form layout is available:<br><br>• Outbound Agreement Details |
| Outbound Inventory Availability | Use this task to access the Outbound Inventory Availability program (P42I04). |

| Task | Description |
| --- | --- |
| Quantity Price Approval | Use this task to access the Outbound Inventory Quantity and Price Override Approvals program (P42I08).<br><br>(Release 9.2 Update) The following form layout is available:<br><br>• Quantity and Price Override |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide* :

- *Creating Outbound Inventory Agreements*
- *Outbound Inventory Availability*
- *Approving Replenishment Quantity and Price Overrides*
- *Working With Outbound Inventory Agreement Changes*

# 41 Outbound Inventory Management Roles: Additional UX One Components for Outbound Inventory Management

## Additional UX One Components for Outbound Inventory Management

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own UX One page or customizing existing pages.

**Charts**

These charts are based on EnterpriseOne programs and business views. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries may be associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available for Outbound Inventory Management:

| Component Title | Description |
|---|---|
| Age of Inventory for On-Hand Quantity by Location (P42I04X\|W42I04XA) | Use this chart to view the age of inventory for the quantity available for consumption at customer locations.<br><br>This chart is based on the Outbound Inventory Agreement Acknowledge business view (V42I02B). |
| Top 10 Customers by Revenue (P42I271X\|W42I271XA) | Use this chart to view the top 10 customers based on the revenue that is generated by the customers from the vendor-managed inventory business.<br><br>This chart is based on the One View Outbound Inventory Valuation Inquiry program (P42I271). |
| Average Age of Inventory by Location (P42I04X\|W42I04XC) | Use this chart to view the average age of inventory for the quantity available for consumption at customer locations.<br><br>This chart is based on the Outbound Inventory Agreement Acknowledge business view (V42I02B). |
| Number of Agreements Below Reorder Point by Customer (P42I04X\|W42I04XE) | Use this chart to view the number of agreements below the reorder point threshold for different customers. The reorder point threshold is hard-coded as 90%.<br><br>**Note:** The system considers the committed and in-transit quantity in calculating the number of agreements.<br><br>This chart is based on the Outbound Availability - F42I021, F38010, F38011, F42I011 business view (V42I011A). |

For additional information about the programs associated with these components, see:

- *Outbound Inventory Availability* in the *JD Edwards EnterpriseOne Applications Outbound Inventory Management Implementation Guide*
- *One View Outbound Inventory Valuation Inquiry (P42I271)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

# 42 Payroll Management Roles: Payroll Manager

## Understanding the Payroll Manager UX One Role

The Payroll Manager role, and the associated UX One pages and components, enable users to:

- Receive important alerts for payroll related activities.
- Analyze information related to tax and leave.
- Easily access payroll inquiry programs.

The Payroll Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Payroll Manager role (PAYMGRJDE), and the components listed below, your system administrator must complete the steps to associate the user ID with the PAYMGRJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Payroll Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Payroll Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Payroll.*

# Using the Payroll Manager UX One Role

You use the Payroll Manager role to access these UX One pages:

- Payroll Manager (P07001X|W07001XA)
- Payroll Manager Review History (P07001X|W07001XB)

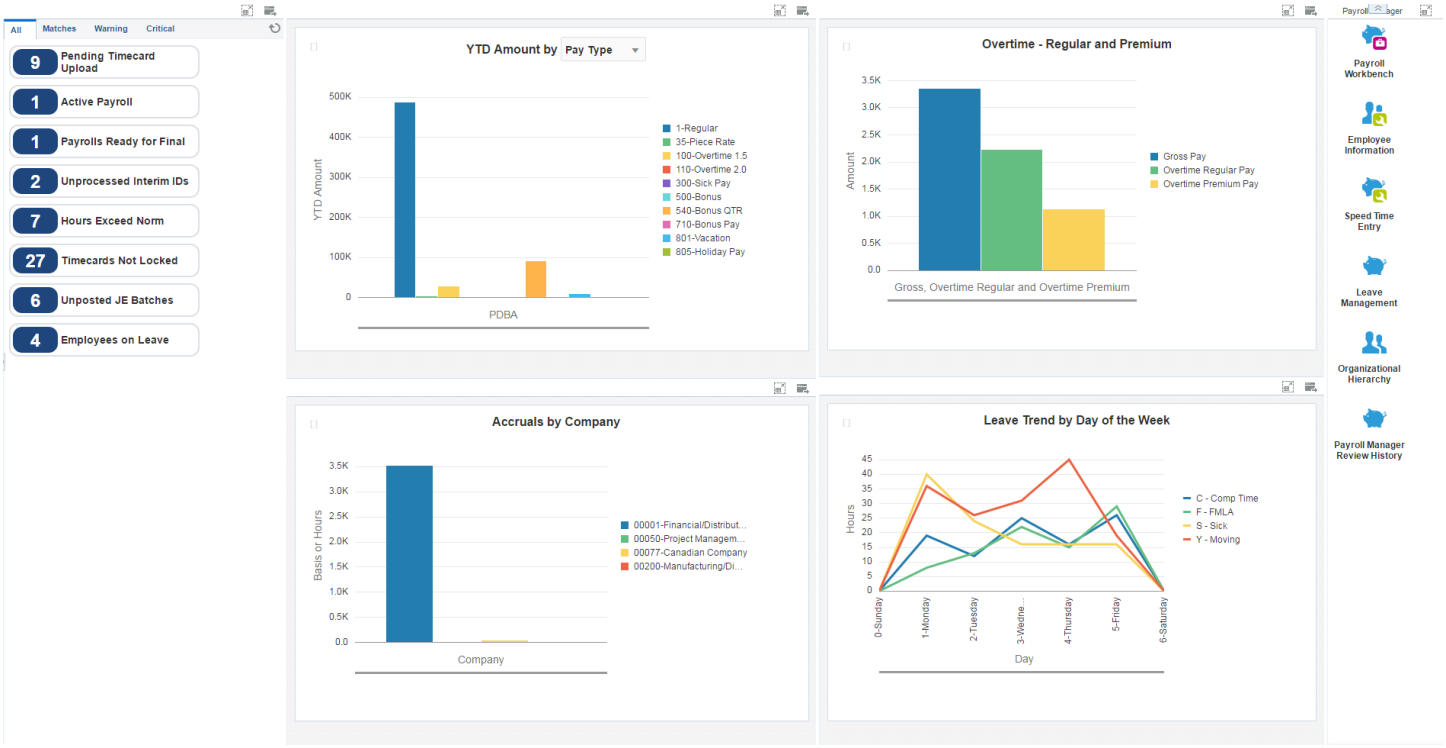
## UX One: Payroll Manager Page

The Payroll Manager page (P07001X|W07001XA) enables users to:

- Receive alerts regarding active payrolls, unprocessed interim IDs, timecards, and employees on leave.
- Analyze pay types, benefits, overtime pay, leave trends, and accruals.
- Act quickly by easily accessing payroll management programs.

To access the UX One Payroll Manager page, log in to the EnterpriseOne system using the Payroll Manager role.

This graphic illustrates the Payroll Manager page:


All
Matches
Warning
Critical
9 Pending Timecard Upload
1 Active Payroll
1 Payrolls Ready for Final
2 Unprocessed Interim IDs
7 Hours Exceed Norm
27 Timecards Not Locked
6 Unposted JE Batches
4 Employees on Leave
YTD Amount by Pay Type
YTD Amount
PDBA
1-Regular
35-Piece Rate
100-Overtime 1.5
110-Overtime 2.0
300-Sick Pay
500-Bonus
540-Bonus QTR
710-Bonus Pay
801-Vacation
805-Holiday Pay
Overtime - Regular and Premium
Amount
Gross, Overtime Regular and Overtime Premium
Gross Pay
Overtime Regular Pay
Overtime Premium Pay
Payroll Workbench
Employee Information
Speed Time Entry
Leave Management
Organizational Hierarchy
Payroll Manager Review History
Accruals by Company
Basis or Hours
Company
00001-Financial/Distribut...
00050-Project Managem...
00077-Canadian Company
00200-Manufacturing/Di...
Leave Trend by Day of the Week
Hours
Day
C - Comp Time
F - FMLA
S - Sick
Y - Moving

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Payroll Manager page:

| Watchlist Alert | Description |
|---|---|
| Pending Timecard Upload | This alert tells users about the number of timecards that are pending for upload.<br>This alert is based on the Work with Time Entry Batch File Revision program (P05116Z1).<br>When you click the alert, the system displays the Work with Time Entry Batch File Revision form. |
| Active Payrolls | This alert tells users about the number of active payrolls.<br>This alert is based on the Work With Pay Cycle Workbench program (P07210).<br>When you click the alert, the system displays the Work With Employee Payment Review form.<br>The following grid format is available:<br>• Simple |
| Payrolls Ready for Final | This alert tells users about the number of payrolls that are ready for Final Update step of the payroll cycle.<br>This alert is based on the Work With Pay Cycle Workbench program (P07210).<br>When you click the alert, the system displays the Work With Employee Payment Review form. The following form layout is available:<br>• Payroll Payment Review<br>The following grid format is available:<br>• Simple |
| Unprocessed Interim IDs | This alert tells users about the number of interim IDs with interim payments that have not yet been processed.<br>This alert is based on the Work With Interims Workbench program (P07210I).<br>When you click the alert, the system displays the Work With Interims Workbench form.<br>The following grid format is available:<br>• Simple |
| Timecards Not Locked | This alert tells users about the number of timecards that are not locked by a payroll version.<br>This alert is based on the Work with Time Entry by Individual program (P051121).<br>When you click the alert, the system displays the Work with Time Entry by Individual form.<br>The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Hours Exceed Norm | This alert tells users about employees with timecards that include hours worked grater than the norm for the timecard.<br>This alert is based on the Work with Time Entry by Individual program (P051121).<br>When you click the alert, the system displays the Speed Time Entry form. The following form layout is available:<br>• Timecard Basic Compensation |
| Unposted JE Batches | This alert tells users about the number of unposted payroll journal entry batches.<br>This alert is based on the Work With Batches program (P0011).<br>When you click the alert, the system displays the Work with Batches form.<br>The following grid format is available:<br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Employees on Leave | This alert tells users about the number of employees that are on paid or unpaid leave.<br>This alert is based on the Employee Information program (P0801).<br>When you click the alert, the system displays the Work with Employee Information form. The following form layout is available:<br>• Employee Emp DBA Review<br>• Employee Organizational Review<br>The following grid format is available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Setting Processing Options for Payroll Cycle Workbench (P07210)* in the *JD Edwards EnterpriseOne Applications Payroll Implementation Guide*
- *Setting Processing Options for the Interims Workbench program (P07210I)* in *JD Edwards EnterpriseOne Applications Payroll Implementation Guide*
- *Setting Processing Options for the Speed Time Entry Program (P051121)* in the *JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Payroll Manager page:

| Component Title | Description |
|---|---|
| YTD Amounts By (P07146X\|W07146XA) | Use this chart to review the year-to-date summary for payroll pay types, deductions, benefits, and accruals.<br><br>This chart is based on the One View PDBA History Inquiry program (P07146).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Accruals<br>• Benefits<br>• Deductions<br>• Pay Types<br>• All |
| Leave Trend by Day of the Week (P071862X\|W071862XB) | Use this chart to review the leave trend of employees by the day of the week.<br><br>This chart is based on the One View Pay History Detail Inquiry program (P071862). |
| Accruals by Company (P071902X\|W071902XA) | Use this chart to view the accruals for various companies.<br><br>This chart is based on the One View DBA History Detail Inquiry program (P071902). |
| Overtime - Regular and Premium (P071862X\|W071862XA) | Use this chart to view the gross pay amount and the overtime amount for regular pay and premium pay.<br><br>This chart is based on the One View Pay History Detail Inquiry program (P071862). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Pay History Detail Inquiry (P071862)*
- *One View PDBA History Inquiry (P07146)*
- *One View DBA History Detail Inquiry (P071902)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Payroll Manager page:

| Task | Description |
|---|---|
| Payroll Workbench | Use this task to access the Payroll Workbench - Work With Pay Cycle Workbench program (P07210).<br><br>The following grid format is available:<br><br>• Simple |

| Task | Description |
|---|---|
| Employee Information | Use this task to access the Employee Information - Work With Employee Information program (P0801).<br>The following form layout is available:<br>• Employee Emp DBA Review<br>• Employee Organizational Review<br>The following grid format is available:<br>• Simple |
| Speed Time Entry | Use this task to access the Speed Time Entry - Work With Time Entry by Individual program (P051121).<br>The following form layout is available:<br>• Speed Time Entry |
| Leave Management | Use this task to access the Leave Management - Leave Management program (P07640). |
| Organization Chart | Use this task to access the Organization Chart.<br>See *Using the Employee Organization Chart* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide* . |
| Payroll Manager Review History | Use this chart to access the Payroll Manager Review History page (P07001X\|W07001XB). |

For additional information about the programs accessed by these tasks, see:

- *Setting Processing Options for Payroll Cycle Workbench (P07210)* in the *JD Edwards EnterpriseOne Applications Payroll Implementation Guide*
- *Setting Processing Options for Employee Master (P0801)* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*
- *Setting Processing Options for the Speed Time Entry Program (P051121)* in the *JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide*
- *Setting Processing Options for Leave Inquiry and Management (P07640)* in the *JD Edwards EnterpriseOne Applications Time and Labor Implementation Guide*

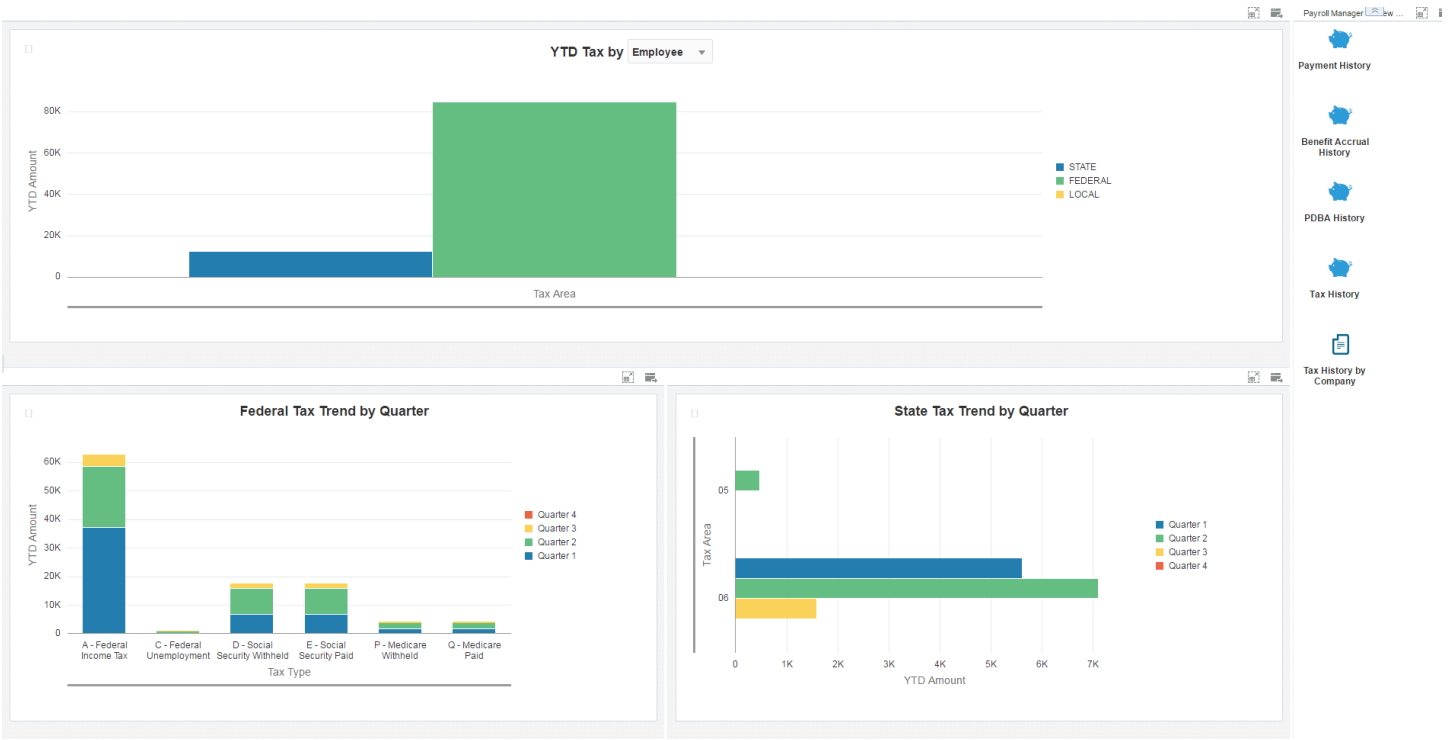
# UX One: Payroll Manager Review History Page

The Payroll Manager Review History page (P07001X|W07001XB) enables users to:

- Analyze tax paid by employees and employers, and review trends in federal, state, and local taxes.
- Act quickly by easily accessing payroll management programs.

To access the Payroll Manager Review History page, log in to the EnterpriseOne system using the Payroll Manager role. When you log in with this role, the system automatically displays the Payroll Manager page. Click the Payroll Manager Review History task on the springboard to access the Payroll Manager Review History page.

This graphic illustrates the Payroll Manager Review History page:


YTD Tax by Employee
80K
60K
40K
20K
0
YTD Amount
Tax Area
STATE
FEDERAL
LOCAL
Payroll Manager
Payment History
Benefit Accrual History
PDBA History
Tax History
Tax History by Company
Federal Tax Trend by Quarter
60K
50K
40K
30K
20K
10K
0
YTD Amount
A - Federal Income Tax
C - Federal Unemployment
D - Social Security Withheld
E - Social Security Paid
P - Medicare Withheld
Q - Medicare Paid
Tax Type
Quarter 4
Quarter 3
Quarter 2
Quarter 1
State Tax Trend by Quarter
05
06
Tax Area
0
1K
2K
3K
4K
5K
6K
7K
YTD Amount
Quarter 1
Quarter 2
Quarter 3
Quarter 4

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are rendered using the delivered queries that are listed below. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Payroll Manager Review History page:

| Component Title | Description |
|---|---|
| YTD Tax by (P07136X\|W07136XC) | Use this chart to view the year-to-date summary of the tax paid.<br><br>This chart is based on the One View PDBA History Inquiry program (P07136).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Employer<br>• Employee |
| Federal Tax Trend by Quarter (P07136X\|W07136XA) | Use this chart to view the federal tax trend for each quarter.<br><br>This chart is based on the One View Tax History Inquiry program (P07136). |
| State Tax Trend by Quarter (P07136X\|W07136XB) | Use this chart to view the state tax trend for each quarter.<br><br>This chart is based on the One View Tax History Inquiry program (P07136). |

For additional information about the programs associated with these charts, see the *One View Tax History Inquiry (P07136)* topic in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Payroll Manager Review History page:

| Tasks | Description |
|---|---|
| Payroll History | Use this task to access the Payment History - Work With Payment History program (P070601).<br><br>The following form layout is available:<br><br>• Payment History Review<br>The following grid format is available:<br><br>• Basic |
| Benefits Accrual History | Use this task to access the Benefits Accrual History - Work With Benefits/Accruals program (P070931). |
| PDBA History | Use this task to access the PDBA History - Work With DBAs History (Payroll Month) program (P079951). |

| Tasks | Description |
| --- | --- |
| | The following form layout is available:<br>• DBAs Payroll Month Review<br>The following grid format is available:<br>• Simple |
| Tax History | Use this task to access the Tax History - Work with Tax History program (P070920).<br>The following form layout is available:<br>• Tax Review<br>The following grid format is available:<br>• Simple |
| Tax History by Company | Use this task to access the Work With Batch Versions - Available Versions program (P98305). |

For additional information about the programs accessed by these tasks, see:

- *Setting Processing Options for Payroll Accrual Inquiry (P070931)* in the *JD Edwards EnterpriseOne Applications Payroll Implementation Guide* .
- *Setting Processing Options for Payroll Accrual Inquiry (P070920)* in the *JD Edwards EnterpriseOne Applications U.S. Payroll Implementation Guide* .

# 43 Procurement Management Roles: Procurement Manager

## Understanding the Procurement Manager UX One Role

The Procurement Manager role and the associated UX One pages and components enable users to quickly and easily view the orders that need to be released or approved. They can use these pages to analyze the number of open orders by item or in a fiscal period, know of any delays from a particular supplier, and take well-informed decisions for future purchases.

The Procurement Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Procurement Manager role (PROCMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the PROCMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Procurement Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Procurement Management.*

# Using the Procurement Manager UX One Role

You use the Procurement Manager role to access these UX One pages:

- Procurement Manager Approval (P43001X|W43001XA)
- Procurement Manager Orders (P43001X|W43001XB)
- Procurement Manager Item Cost (P43001X|W43001XC)

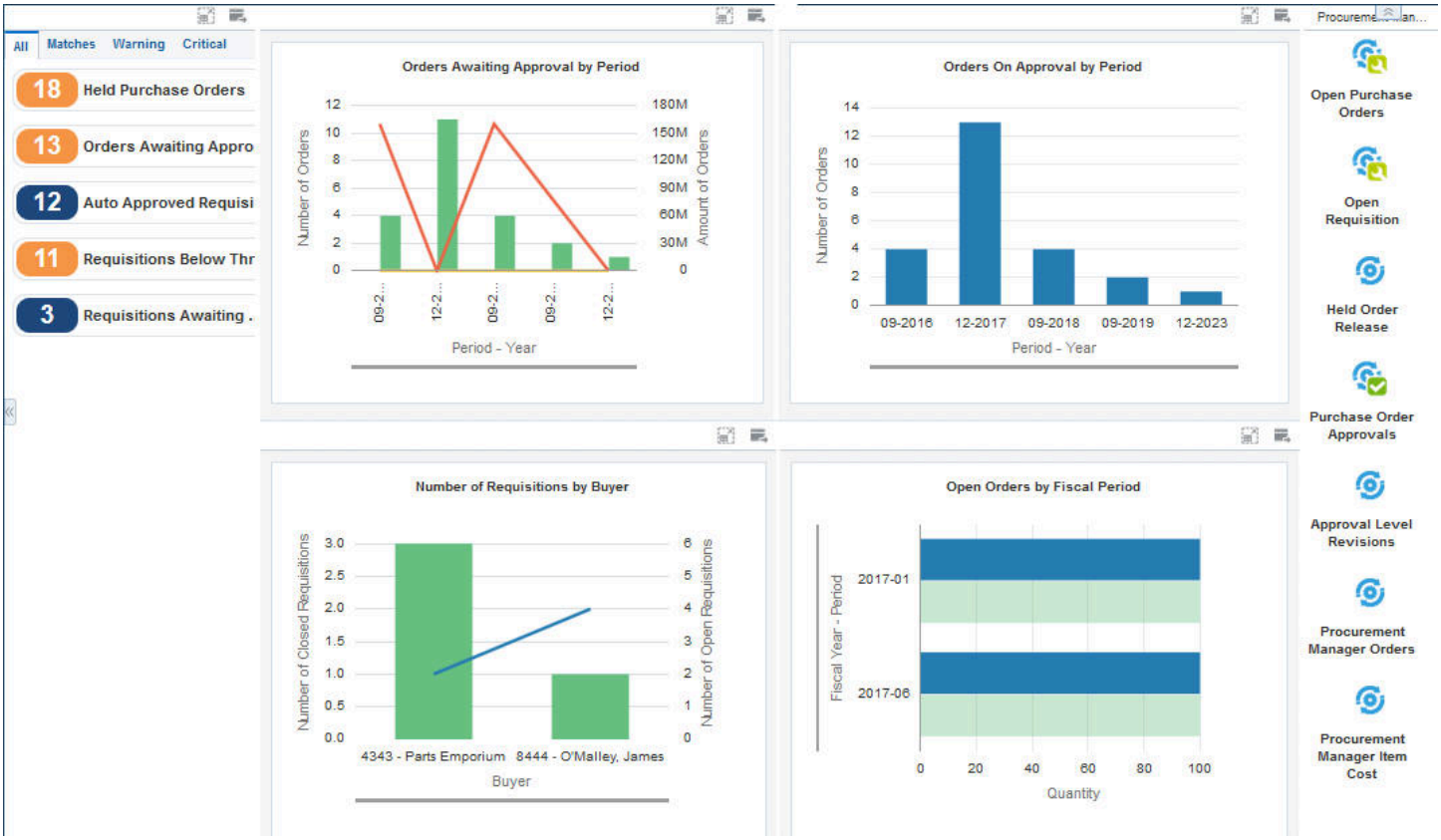
## UX One: Procurement Manager Approval Page

The Procurement Manager Approval page (P43001X|W43001XA) enables users to:

- Receive alerts associated with orders awaiting approval and release.
- Analyze open orders by item and by fiscal period.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Procurement Manager Approval page, log in to the EnterpriseOne system using the Procurement Manager role.

This graphic illustrates the Procurement Manager Approval page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Procurement Manager Approval page:

| Watchlist Alert | Description |
|---|---|
| Held Purchase Orders | This alert tells users how many purchase orders are on hold. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Held Order Release program (P43070).<br>When you click the alert, the system displays the Work With Held Orders form.<br>The following grid format is available:<br>• Simple |
| Orders Awaiting Approvals | This alert tells users how many purchase orders are awaiting approval.<br>This alert is based on the Purchase Order Approvals program (P43081).<br>When you click the alert, the system displays the Work With Orders Awaiting Approval form. The following form layout is available:<br>• Procurement Manager_Approvals<br>The following grid format is available:<br>• Simple |
| Auto Approved Requisitions | This alert tells users how many requisitions are automatically approved.<br>This alert is based on the Order Entry program (P4310).<br>When you click the alert, the system displays the Work With Order Headers form.<br>The following grid format is available:<br>• Simple |
| Requisitions Below Threshold Amount | This alert tells users how many recently entered requisitions are under the approval threshold.<br>This alert is based on the Order Entry program (P4310).<br>When you click the alert, the system displays the Work With Order Headers form.<br>The following grid format is available:<br>• Simple |
| (Release 9.2 Update) Requisitions Awaiting Approval | This alert tells users how many requisitions are pending approval.<br>This alert is based on the Inquire Requisition Awaiting Approval program (P4209).<br>When you click the alert, the system displays the Inquire Requisitions Awaiting Approval form. The following form layout is available:<br>• Procurement Manager<br>The following grid format is available:<br>• Procurement Manager |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*:

- *Working with Orders on Hold*

- *Entering Cascading Receipts*
- *Creating Vouchers*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Procurement Manager Approval page:

| Component Title | Description |
|---|---|
| Orders Awaiting Approval by Period<br>P43081X\|W43081XA | Use this chart to view the orders awaiting monetary and budget approval by period.<br>This chart is based on the Purchase Order Approvals program (P43081). |
| Orders on Approval by Period<br>P43081X\|W43081XB | Use this chart to view all orders with the status of pending approval by period.<br>This chart is based on the Purchase Order Approvals program (P43081). |
| Number of Requisitions by Buyer<br>P4311X\|W4311XE | Use this chart to view the number of requisitions, by buyers, that are currently overdue.<br>This chart is based on the Expiring Blanket Orders Inquiry program (P4311). |
| Open Orders by Fiscal Period<br>P43261X\|W43261XB | Use this chart to view the open orders by fiscal period.<br>This chart is based on the One View Purchase Order Inquiry program (P43261). |

For additional information about the programs associated with these charts, see:

- *Working with Orders Awaiting Approval* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *One View Purchase Order Inquiry (P43261)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
- *Inquiry Programs for Procurement Management*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Procurement Manager Approval page:

| Task | Description |
|---|---|
| Open Purchase Orders | Use this task to access the Order Entry program (P4310, version ZJDE0036).<br>The following form layout is available:<br>• Orders and Item Availability |

| Task | Description |
|---|---|
| | The following grid format is available:<br>• Orders and Item Availability |
| Open Requisition | Use this task to access the Order Entry program (P4310, version ZJDE0003).<br>The following form layout is available:<br>• Orders and Item Availability<br>The following grid format is available:<br>• Item Availability List |
| Held Order Release | Use this task to access the Held Order Release program (P43070, version ZJDE0001). |
| Purchase Order Approvals | Use this task to access the Purchase Order Approvals program (P43081, version ZJDE0005).<br>The following form layout is available:<br>• Procurement Manager_Approvals<br>The following grid format is available:<br>• Procurement Manager_Approvals |
| Approval Level Revisions | Use this task to access the Approval Level Revisions program (P43008, version ZJDE0001). |
| Procurement Manager Orders | Use this task to access the Procurement Manager Orders page (P43001X\|W43001XC). |
| Procurement Manager Item Cost | Use this task to access the Procurement Manager Item Cost (P43001X\|W43001XC). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*:

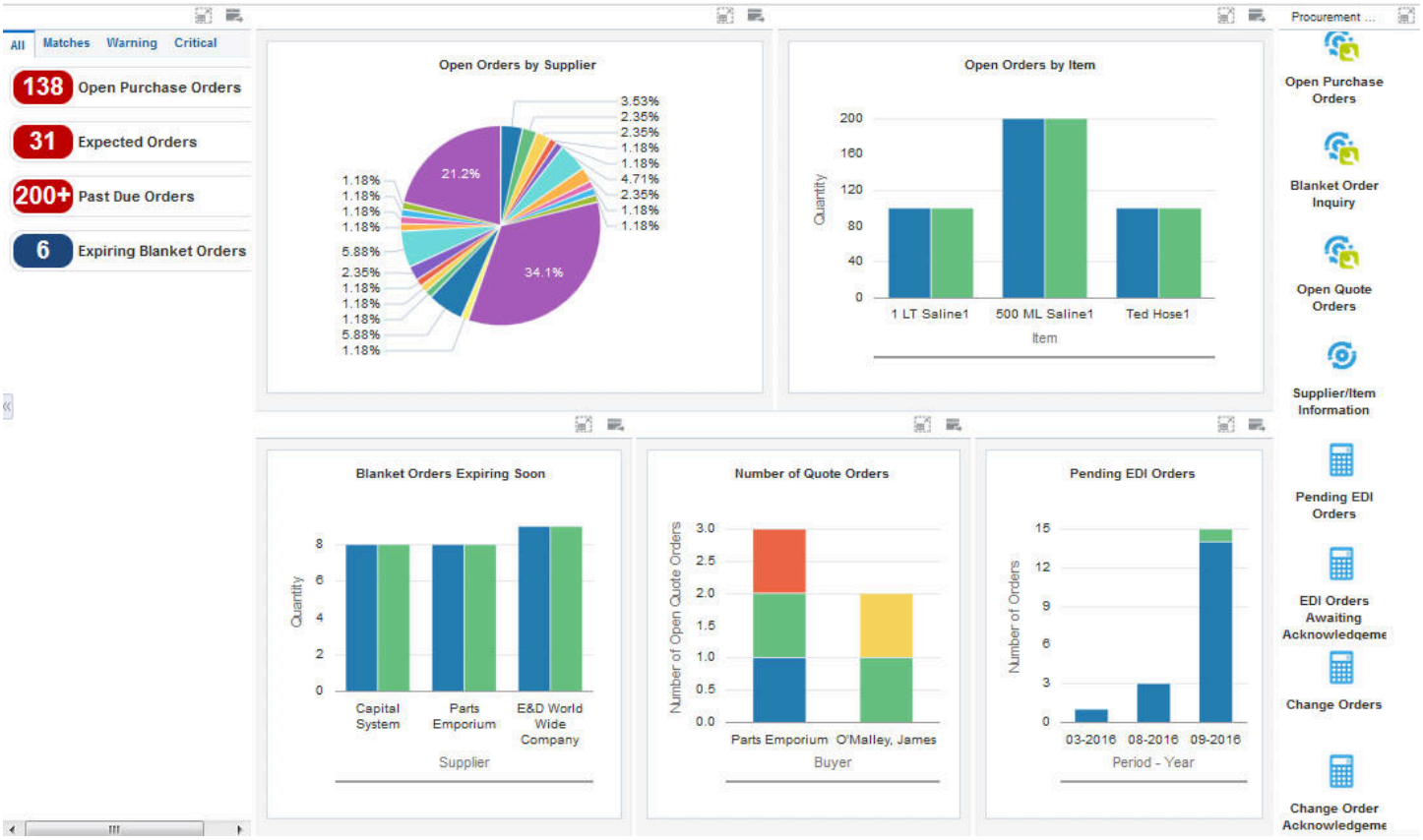
- *Working with Orders on Hold*
- *Entering Cascading Receipts*
- *Creating Vouchers*
- *Working with Approval Routes*

# UX One: Procurement Manager Orders Page

The Procurement Manager Orders page (P43001X|W43001XB) enables users to quickly view open orders based on various criteria and review requisitions with respect to a buyer, and orders awaiting approval. Additionally, the page enables users to receive alerts on held orders, orders awaiting approval, and requisitions that are approved, awaiting approval, and the ones below the threshold amount that need action, and to quickly and easily access applications to work on orders and requisitions.

To access the UX One Procurement Manager Orders page, log in to the EnterpriseOne system using the Procurement Manager role. When you log in with this role, the system automatically displays the Procurement Manager Approval page. Click the Procurement Manager Orders task on the springboard to access the Procurement Manager Orders page.

This graphic illustrates the Procurement Manager Orders page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Procurement Manager Orders page:

| Watchlist Alert | Description |
|---|---|
| Open Purchase Orders | This alert tells users how many purchase orders are in open status.<br>This alert is based on the One View Simple Procurement Inquiry program (P43265).<br>When you click the alert, the system displays the One View Simple Procurement Inquiry form.<br>The following grid format is available:<br>• Simple |
| Expected Orders | This alert tells users how many purchase orders are expected in the next 60 days.<br>This alert is based on the One View Purchase Order Inquiry program (P43261).<br>When you click the alert, the system displays the One View Purchase Order Inquiry form.<br>The following grid format is available:<br>• Simple |
| Past Due Orders | This alert tells users how many orders are past the due date.<br>This alert is based on the One View Purchase Order Inquiry program (P43261).<br>When you click the alert, the system displays the One View Purchase Order Inquiry form.<br>The following grid format is available:<br>• Simple |
| (Release 9.2 Update) Expiring Blanket Orders | This alert tells users how many blanket orders are going to expire soon.<br>This alert is based on the Expiring Blanket Orders Inquiry program (P4311). When you click the alert, the system displays the Blanket Orders Inquiry form.<br>The following form layout is available:<br>• Item Availability<br>The following grid format is available:<br>• Blanket Orders |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Simple Procurement Inquiry (P43265)*
- *One View Purchase Order Inquiry (P43261)*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Procurement Manager Orders page:

| Component Title | Description |
|---|---|
| Open Orders by Supplier (P4311X\|W4311XB) | Use this chart to view the number of open orders by supplier.<br>This chart is based on the Expiring Blanket Orders Inquiry program (P4311). |
| Open Orders by Item (P43261X\|W43261XD) | Use this chart to view the number of open orders by item.<br>This chart is based on the One View PO Inquiry - F4311/F43121/F4301 Join business view (V43261A). |
| Blanket Orders Expiring Soon (P4311X\|W4311XD) | Use this chart to view the blanket orders that are due to expire soon.<br>This chart is based on the One View Purchase Order Inquiry program (P43261). |
| Number of Quote Orders (P4311X\|W4311XB) | Use this chart to view the total number of quote orders.<br>This chart is based on the Expiring Blanket Orders Inquiry program (P4311). |
| Pending EDI Orders (P47016X\|W47016XA) | Use this chart to view the pending EDI orders.<br>This chart is based on the Outbound EDI Orders - Header Revisions business view (V47016B). |

For additional information about the programs associated with these charts and graphs, see this topic in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Supplier Payment Inquiry (P04720)*
- *One View Purchase Order Inquiry (P43261)*
- *Creating Vouchers*
- *Inquiry Programs for Procurement Management*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Procurement Manager Orders page:

| Task | Description |
|---|---|
| Open Purchase Orders | Use this task to access the Work with Order Headers program (P4310, version ZJDE0036).<br>The following form layout is available:<br>• Orders and Item Availability<br>The following grid format is available: |

| Task | Description |
|---|---|
| | • Orders and Item Availability |
| Blanket Order Inquiry | Use this task to access the Order Entry program (P4310, version ZJDE0006). |
| Open Quote Orders | Use this task to access the Order Entry program (P4310, version ZJDE0002). |
| Supplier/Item Information | Use this task to access the Supplier/Item Relationships program (P43090, version ZJDE0001). |
| Pending EDI Orders | Use this task to access the Outbound EDI Order Inquiry program (P47016). |
| EDI Orders Awaiting Acknowledgement | Use this task to access the Inbound EDI Order Acknowledgement Inquiry program (P47020, version ZJDE0001). |
| Change Orders | Use this task to access the Outbound EDI P.O. Change Inquiry program (P47136, version ZJDE0001). |
| Change Order Acknowledgement | Use this task to access the Outbound EDI P.O. Change Acknowledgement Inquiry program (P47146, version ZJDE0001). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*:

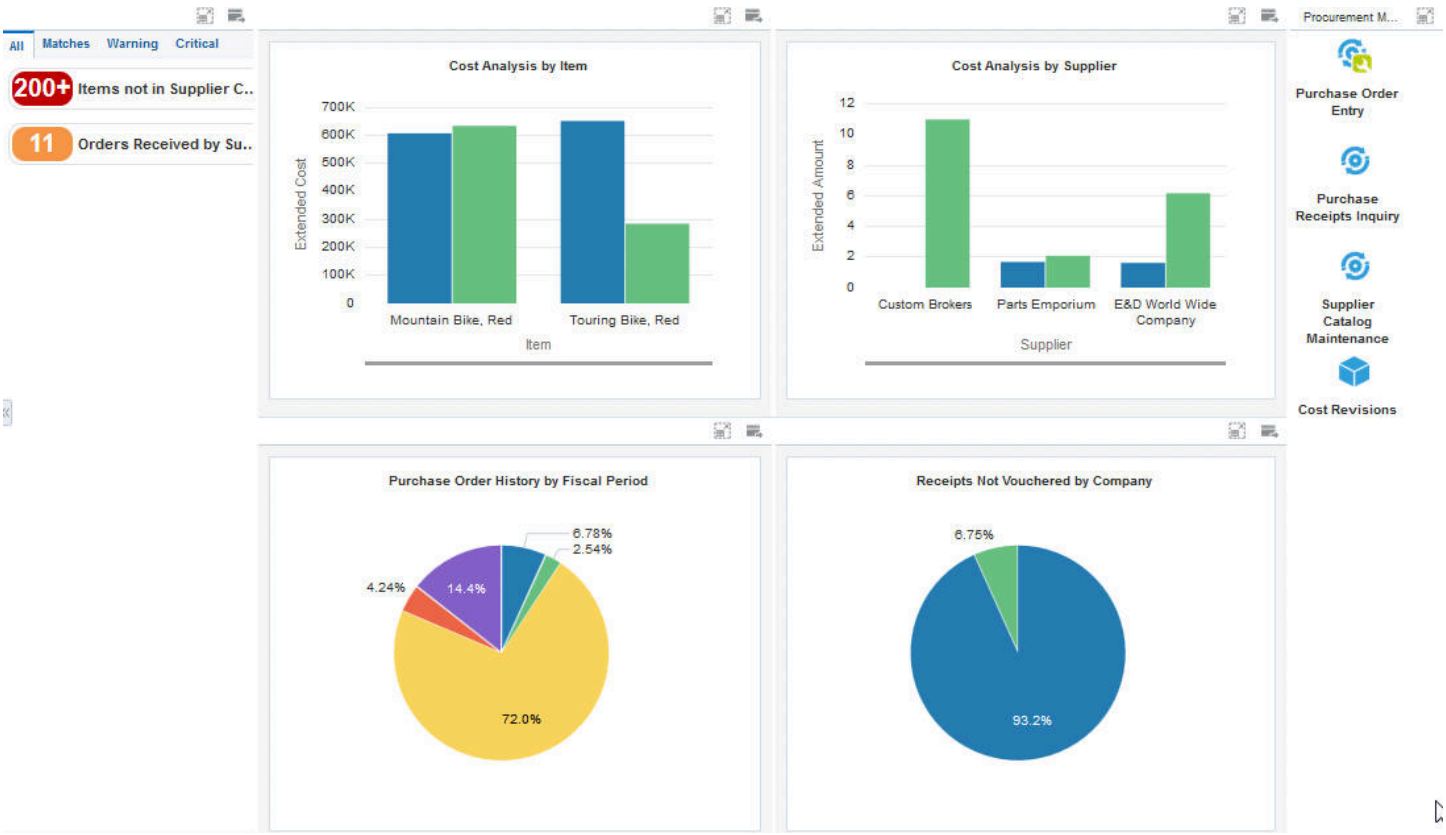
- *Entering Purchase Orders*
- *Setting Up Supplier and Item Information*

# UX One: Procurement Manager Item Cost Page

The Procurement Manager Item Cost page (P43001X|W43001XC) enables users to quickly view the costs by item, costs by supplier, orders received in a time period, and orders received that were not vouchered. Additionally, the page enables users to receive alerts on items received that are outside of suppliers' catalog and the orders with maximum cost to identify high volume suppliers, and to quickly and easily access applications to work on costs and purchase orders.

To access the UX One Procurement Manager Item Cost page, log in to the EnterpriseOne system using the Procurement Manager role. When you log in with this role, the system automatically displays the Procurement Manager Approval page. Click the Procurement Manager Item Cost task on the springboard to access the Procurement Manager Item Cost page.

This graphic illustrates the Procurement Manager Item Cost page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Procurement Manager Item Cost page:

| Watchlist Alert | Description |
|---|---|
| Items Not in Supplier Catalog | This alert tells users how many items are ordered but are not from the catalog of a supplier. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the One View Supplier Cost Analysis Inquiry program (P43266).<br>When you click the alert, the system displays the One View Supplier Cost Analysis Inquiry form. |
| Orders Received by Supplier | This alert tells users the number of orders received from a supplier for an item.<br>This alert is based on the One View Supplier Cost Analysis Inquiry program (P43266).<br>When you click the alert, the system displays the One View Supplier Cost Analysis Inquiry form.<br>The following grid format is available:<br>• Simple |

For additional information about the program associated with these watchlist alerts, see *One View Supplier Cost Analysis Inquiry (P43266)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Procurement Manager Item Cost page:

| Component Title | Description |
|---|---|
| Cost Analysis by Item (P43266X\|W43266XD) | Use this chart to view the extended cost by item.<br>This chart is based on the One View Supplier Cost Analysis Inquiry program (P43266). |
| Cost Analysis by Supplier (P43266X\|W43266XA) | Use this chart to view the extended cost by supplier.<br>This chart is based on the One View Supplier Cost Analysis Inquiry program (P43266). |
| Purchase Order History by Fiscal Period (P43261X\|W43261XE) | Use this chart to view the history of purchase orders by fiscal period.<br>This chart is based on the One View Purchase Order Inquiry program (P43261). |
| Receipts Not Vouchered by Company (P43260X\|W43260XA) | Use this chart to view the total number of receipts that do not have a corresponding voucher. The chart shows these details by company.<br>This chart is based on the One View Purchase Order Receipts Inquiry program (P43260). |

For additional information about the programs associated with these charts and graphs, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Supplier Cost Analysis Inquiry (P43266)*
- *One View Purchase Order Inquiry (P43261)*

- *One View Purchase Order Receipts Inquiry (P43260)*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Procurement Manager Item Cost page:

| Task | Description |
|---|---|
| Purchase Order Entry | Use this task to access the Order Entry program (P4310, version ZJDE0001).<br>The following form layout is available:<br>• Orders and Item Availability |
| Purchase Receipts Inquiry | Use this task to access the Purchase Receipts Inquiry program (P43214, version ZJDE0001). |
| Supplier Catalog Maintenance | Use this task to access the Supplier Catalog Maintenance program (P41061, version ZJDE0001). |
| Cost Revisions | Use this task to access the Cost Revisions program (P4105, version ZJDE0001). |

For additional information about the programs accessed by these tasks, see:

- *Setting up Bulk Items* in the *JD Edwards EnterpriseOne Applications Bulk Stock Inventory Implementation Guide*
- *Creating Vouchers* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Entering Cascading Receipts* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Setting Up Supplier Information* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Setting Up Item Information by Depot* in the *JD Edwards EnterpriseOne Applications Bulk Stock Inventory Implementation Guide*

# 44 Procurement Management Roles: Strategic Buyer

## Understanding the Strategic Buyer UX One Role

The Strategic Buyer role, and the associated UX One pages and components, enable users to receive important alerts regarding orders by specific suppliers, and to track orders by specific suppliers in order to help them make targeted procurement decisions.

The Strategic Buyer pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Strategic Buyer role (BUYERJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the BUYERJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log into the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Strategic Buyer role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*.

# Using the Strategic Buyer UX One Role

You use the Strategic Buyer role to access these UX One pages:

- Strategic Buyer Quote Orders (P43002X|W43002XA)
- Strategic Buyer Order Delivery (P43002X|W43002XB)
- Strategic Buyer Other Orders (P43002X|W43002XC)

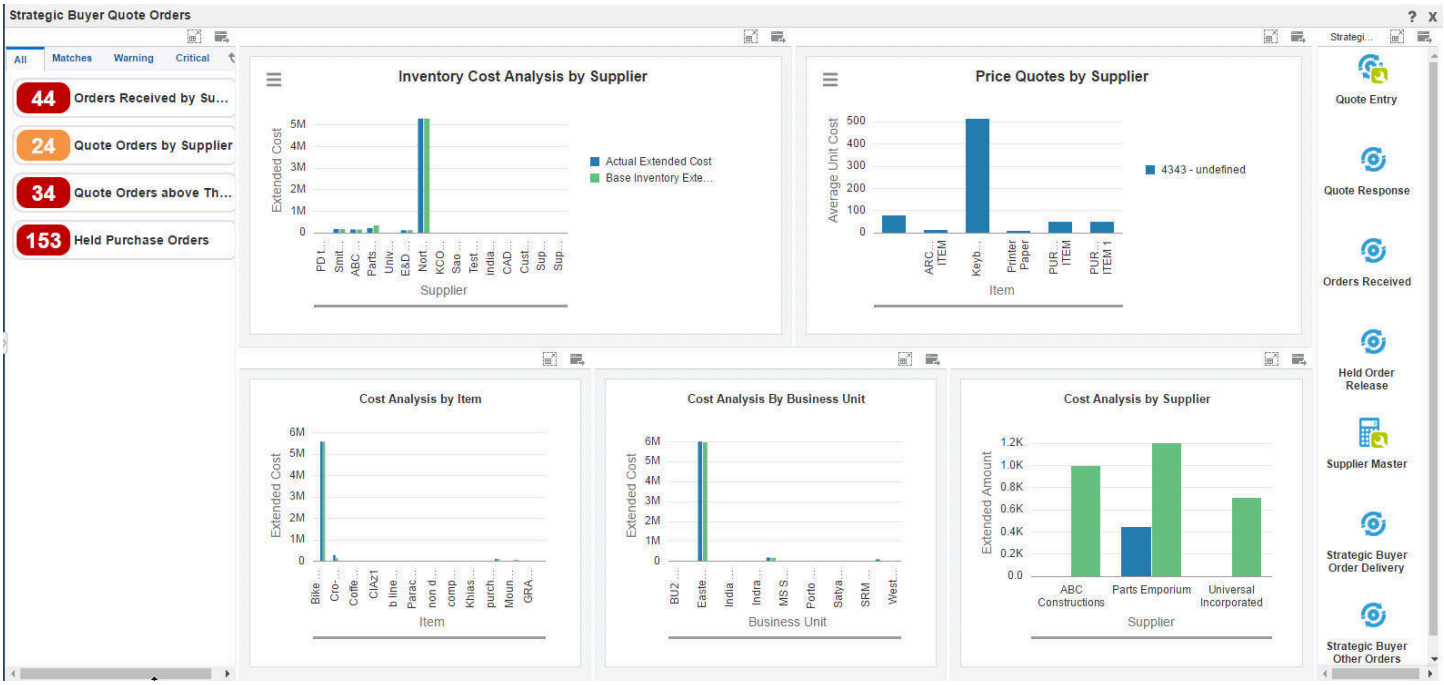
## UX One: Strategic Buyer Quote Orders Page

The Strategic Buyer Quote Orders page (P43002X|W43002XA) enables users to:

- Receive alerts on quote orders that need immediate attention.
- Analyze the cost of products and identify potential suppliers.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Strategic Buyer Quote Orders page, log in to the EnterpriseOne system using the Strategic Buyer role.

This graphic illustrates the Strategic Buyer Quote Orders page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query, or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the alerts that are available on the Strategic Buyer Quote Orders page:

| Watchlist Alerts | Description |
|---|---|
| Orders Received by Supplier | This alert tells users the number of orders received by suppliers.<br><br>This alert is based on the Purchase Receipts Inquiry program (P43214). When you click the alert, the system displays the Work with Purchase Receipts form. |
| Quote Orders by Supplier | This alert tells users the number of quote orders from suppliers.<br><br>This alert is based on the Purchase Order Entry program (P4310). When you click the alert, the system displays the Work with Order Headers form. |
| Quote Orders Above Threshold Amount | This alert tells users how many orders have a quantity that exceeds the threshold amount.<br><br>This alert is based on the Purchase Order Entry program (P4310). When you click this alert, the system displays the Work with Order Headers form. |
| Held Purchase Orders | This alert tells users how many purchase orders are on hold.<br><br>This alert is based on the Held Order Release program (P43070). When you click the alert, the system displays the Work with Held Orders form. |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide:*

- *Entering Cascading Receipts*
- *Processing Special Orders*
- *Working with Orders on Hold*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Strategic Buyer Quote Orders page:

| Chart | Description |
|---|---|
| Inventory Cost Analysis By Supplier (P43266X\|W43266XF) | Use this chart to view the base inventory extended cost versus the actual extended cost by supplier.<br><br>This chart is based on the One View Supplier Cost Analysis Inquiry program (P43266). |
| Price Quotes By Supplier (P43301X\|W43301XA) | Use this chart to view the average unit cost by item for a supplier.<br><br>This chart is based on the F4301, F4311, F4330, and F4311 join business view (V43301A). |

| Chart | Description |
|---|---|
| Cost Analysis By Item (P43266X\|W43266XD) | Use this chart to view the base inventory extended cost versus actual extended cost by item.<br><br>This chart is based on the One View Supplier Cost Analysis Inquiry program (P43266). |
| Cost Analysis By Business Unit (P43266X\|W43266XE) | Use this chart to view the base inventory extended cost versus actual extended cost by business unit.<br><br>This chart is based on the One View Supplier Cost Analysis Inquiry program (P43266). |
| Cost Analysis By Supplier (P43266X\|W43266XA) | Use this chart to view the quantity received in a specific time period by supplier.<br><br>This chart is based on the One View Supplier Cost Analysis Inquiry program (P43266). |

For additional information about the programs associated with these charts, see *One View Supplier Cost Analysis Inquiry* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Strategic Buyer Quote Orders page:

| Task | Description |
|---|---|
| Quote Entry - Order Header | Use this task to access the Purchase Order Entry program (P4310, version ZJDE0002). |
| Quote Response | Use this task to access the Quote Response Entry program (P4334, version ZJDE0001). |
| Orders Received | Use this task to access the Purchase Receipts Inquiry program (P43214, version ZJDE0001). |
| Held Order Release | Use this task to access the Held Order Release program (P43070, version ZJDE0001). |
| Supplier Master | Use this task to access the Supplier Master program (P04012, version ZJDE0001). |
| Strategic Buyer Order Delivery | Use this task to access the Strategic Buyer Order Delivery page (P43002X\|W43002XB). |
| Strategic Buyer Other Orders | Use this task to access the Strategic Buyer Other Orders page (P43002X\|W43002XC). |

For additional information about the program accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide:*

- *Entering Cascading Receipts*
- *Processing Special Orders*
- *Working with Orders on Hold*
- *Responding to Requests for Quotes*

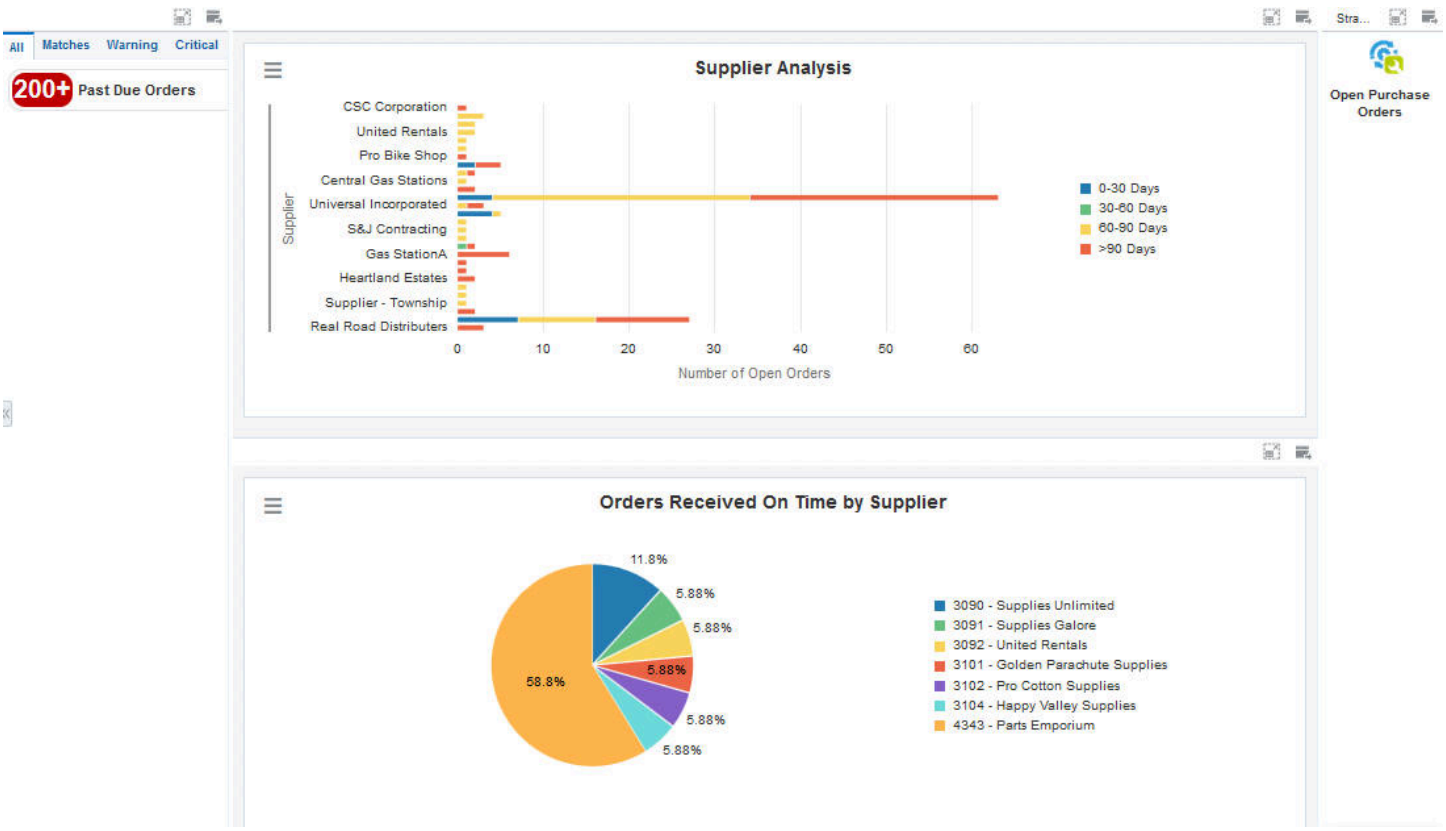
- *Setting Up Supplier and Item Information*

# UX One: Strategic Buyer Order Delivery Page

The Strategic Buyer Order Delivery page (P43002X|W43002XB) enables users to quickly review the number of orders that were due in the past, the number of open orders, and the percentage of orders that were received on time by supplier. Additionally, the page enables users to easily access applications to create vouchers and manage quote orders.

To access the UX One Strategic Buyer Order Delivery page, log in to the EnterpriseOne system using the Strategic Buyer role. When you log in with this role, the system automatically displays the Strategic Buyer Quote Orders page. Click the Strategic Buyer Order Delivery task on the springboard to access the Strategic Buyer Order Delivery page.

This graphic illustrates the Strategic Buyer Order Delivery page:




### Watchlist Alerts

These alerts are based on EnterpriseOne program. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query, or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the alert that is available on the Strategic Buyer Order Delivery page:

| Watchlist Alerts | Description |
|---|---|
| Past Due Orders | This alert tells users the number of orders that are past due. |

| Watchlist Alerts | Description |
|---|---|
| | This alert is based on the One View Purchase Order Inquiry program (P43261). When you click the alert, the system displays the One View Purchase Order Inquiry form. |

For additional information about the program associated with this watchlist alert, see *One View Purchase Order Inquiry* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Strategic Buyer Order Delivery page:

| Chart | Description |
|---|---|
| Supplier Analysis (P4311X\|W4311XA) | Use this chart to view the number of open orders by supplier for a specific period.<br><br>(Release 9.2 Update) This chart is based on the Expiring Blanket Orders Inquiry program (P4311). |
| Orders Received On Time By Supplier (P43261X\|W43261XC) | Use this chart to view the percentage of orders received on time by supplier.<br><br>This chart is based on the One View Purchase Order Inquiry program (P43261). |

For additional information about the programs associated with these charts, see:

- *One View Purchase Order Inquiry (P43261)* in the *EOAOV*
- *Inquiry Programs for Procurement Management*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Strategic Buyer Order Delivery page:

| Task | Description |
|---|---|
| Open Purchase Orders | Use this task to access the Purchase Order Entry program (P4310, version ZJDE0001). The following form layout is available:<br><br>• Orders and Item Availability<br>The following grid format is available:<br><br>• Orders and Item Availability |

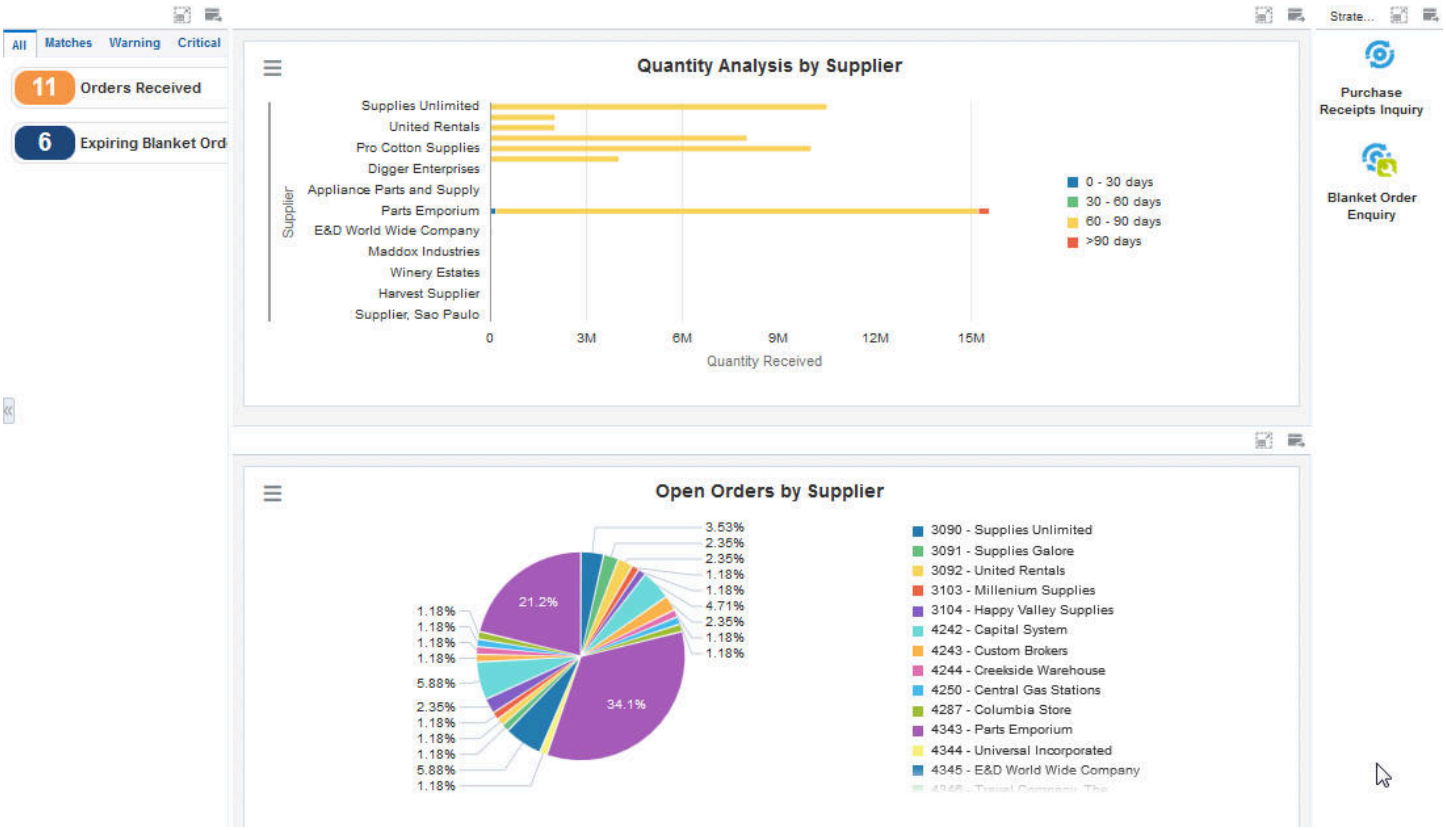
For additional information about the program accessed by these tasks, see *Entering Purchase Orders* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .

# UX One: Strategic Buyer Other Orders Page

The Strategic Buyer Other Orders page (P43002X|W43002XC) enables users to quickly and easily review the total quantity received for any supplier and also to review the percentage of orders awaiting fulfillment by supplier. The page also enables users to receive alerts for purchase orders received and blanket orders that are due to expire soon.

To access the UX One Strategic Buyer Other Orders page, log in to the EnterpriseOne system using the Strategic Buyer role. When you log in with this role, the system automatically displays the Strategic Buyer Quote Orders page. Click the Strategic Buyer Other Orders task on the springboard to access the Strategic Buyer Other Orders page.

This graphic illustrates the Strategic Buyer Other Orders page:



### Watchlist Alerts

These alerts are based on EnterpriseOne program. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query, or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the alerts that are available on the Strategic Buyer Order Delivery Other Orders page:

| Watchlist Alerts | Description |
|---|---|
| Orders Received | This alert displays the number of orders received.<br><br>This alert is based on the One View Supplier Cost Analysis Inquiry program (P43266). When you click the alert, the system displays the One View Supplier Cost Analysis Inquiry form. |
| (Release 9.2 Update) Expiring Blanket Orders | This alert displays the number of blanket orders that are going to expire soon.<br><br>This alert is based on the Expiring Blanket Orders Inquiry program (P4311). When you click the alert, the system displays the Blanket Orders Inquiry form.<br><br>The following form layout is available:<br><br>• Item Availability<br>The following grid format is available:<br><br>• Blanket Orders |

For additional information about the programs associated with these watchlist alerts, see:

- *One View Supplier Cost Analysis Inquiry (P43266)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Inquiry Programs for Procurement Management*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Strategic Buyer Other Orders page:

| Chart | Description |
|---|---|
| Quantity Analysis by Supplier (P43260X\|W43260XB) | Use this chart to view quantity received by supplier for a specific period.<br><br>This chart is based on the One View Purchase Order Receipts Inquiry program (P43260). |
| Open Orders By Supplier (P4311X\|W4311XB) | Use this chart to view the number of open orders that are awaiting fulfillment by supplier.<br><br>This chart is based on the Expiring Blanket Orders Inquiry program (P4311). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Simple Procurement Inquiry (P43265)*
- *Inquiry Programs for Procurement Management*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Strategic Buyer Other Orders page:

| Task | Description |
|---|---|
| Purchase Receipts Inquiry | Use this task to access the Purchase Receipts Inquiry program (P43214, version ZJDE0001). |
| Blanket Order Enquiry | Use this task to access the Purchase Order Entry program (P4310, version ZJDE0006). |

For additional information about the program accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide:*

- *Entering Cascading Receipts*
- *Creating Vouchers*

# 45 Project Management Roles: Project Manager

## Understanding the Project Manager UX One Role

The Project Manager role, and the associated UX One pages and components, enable users to:

- Analyze the financial health and performance of projects, including change requests and change orders.
- Easily access various project management programs.

The Project Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Project Manager role (PROJMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the PROJMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the pages for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Project Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the following guides:

- *JD Edwards EnterpriseOne Applications Advanced Job Forecasting Implementation Guide* .
- *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide*
- *JD Edwards EnterpriseOne Applications Change Management Implementation Guide*

# Using the Project Manager UX One Roles

You use the Project Manager role to access the following UX One pages:

- Project Execution (P51001X|W51001XA)
- Manage Jobs (P51001X|W51001XE)
- Manage Job Forecasts (P51001X|W51001XF)
- Change Requests (P51001X|W51001XD)
- Planned Change Orders (P51001X|W51001XC)
- Change Orders (P51001X|W51001XB)

## UX One: Project Execution Page

The Project Execution page (P51001X|W51001XA) enables users to:

- Receive alerts regarding aspects that affect the financial performance of projects.
- Analyze the overall financial health of a project.
- Easily access all aspects of a job throughout the entire project lifecycle.

To access the UX One Project Execution page, log in to the EnterpriseOne system using the Project Manager role.

This graphic illustrates the Project Execution page.

## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call

a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Project Execution page:

| Watchlist Alert | Description |
|---|---|
| Equipment Down | This alert tells users about the number of pieces of equipment that are currently non-functional.<br><br>This alert is based on the Work with Equipment Master program (P1701, version ZJDE0002).<br><br>When you click the alert, the system displays the Work with Equipment Master form. The following form layout is available:<br><br>• Equipment Status History |
| Pending Voucher Batches | This alert tells users about the number of voucher batches pending approval.<br><br>This alert is based on the Work With Batches program (P0011, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Working With Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Approved Voucher Batches | This alert tells users about the number of voucher batches that are approved.<br><br>This alert is based on the Work With Batches program (P0011, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple<br>Additionally, the system displays the updated Work Center on the right side of the form. See *Working With Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Voucher Batches in Error | This alert tells users about the number of voucher batches that have encountered an error.<br><br>This alert is based on the Work With Batches program (P0011, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Batches form. The following form layout is available:<br><br>• Batch Journal Review<br>The following grid format is available:<br><br>• Simple |

| Watchlist Alert | Description |
|---|---|
| | Additionally, the system displays the updated Work Center on the right side of the form. See *Working With Work Center CafeOne Application* in the *JD Edwards EnterpriseOne Tools Foundation Guide* . |
| Contractor Logs Soon to Expire | This alert tells users about the number of contractor logs that are about to expire.<br>This alert is based on the Logs Entry program (P4305, version ZJDE0002).<br>When you click the alert, the system displays the Work With Logs form. |
| Job Logs Soon to Expire | This alert tells users about the number of job logs that are about to expire.<br>This alert is based on the Logs Entry program (P4305, version ZJDE0004).<br>When you click the alert, the system displays the Work With Logs form. |
| Expired Job Logs | This alert tells users about the number of job logs that have expired.<br>This alert is based on the Logs Entry program (P4305, version ZJDE0004).<br>When you click the alert, the system displays the Work With Logs form. |
| Project Logs Soon to Expire | This alert tells users about the number of project logs that are about to expire.<br>This alert is based on the Logs Entry program (P4305, version ZJDE0003).<br>When you click the alert, the system displays the Work With Logs form. |
| Expired Project Logs | This alert tells users about the number of project logs that have expired.<br>This alert is based on the Logs Entry program (P4305, version ZJDE0003).<br>When you click the alert, the system displays the Work With Logs form. |
| Urgent Pending Change Requests | This alert tells users about the number of urgent change requests that are pending.<br>This alert is based on the Change Request Entry program (P5310, version ZJDE0002).<br>When you click the alert, the system displays the Work With Change Requests form. The following form layout is available:<br>• Change Request Overview<br>The following grid format is available:<br>• Simple |
| Pending Change Requests | This alert tells users how many change requests are pending (status = P).<br>This alert is based on the Change Request Entry program (P5310).<br>When you click the alert, the system displays the Work With Change Requests form. The following form layout is available:<br>• Change Request Overview<br>The following grid format is available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Understanding the Equipment Master* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide .*
- *Working with Log Information* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*
- *Creating Change Requests* in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide*
- *Working with Batches* in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Project Execution page:

| Component Title | Description |
|---|---|
| Percent Complete by Job (P51006X1\|W51006X1A) | Use this chart to review the percent completion of selected jobs. The jobs are displayed in descending order by percent complete.<br><br>This chart is based on the Job Cost Master Revisions program (P51006, version ZJDE0014). |
| Average Days At and Not At Status by (P13400X\|W13400XA) | Use this chart to view the number of days that products have been at or not at a specified status.<br><br>This chart is based on the One View Equipment Status Inquiry program (P13400).<br><br>You can use the drop-down menu on the top of the chart to change the data that the system displays. You can select from these options:<br><br>• Equipment<br>• Manufacturer<br>• Product Family |
| Open vs. Gross Amounts by Supplier (P04220X\|W04220XA) | Use this chart to review the open and gross amounts of the suppliers for a specific job (business unit). The amounts are displayed in descending order by open amount.<br><br>This chart is based on the A/P Inquiry by Job program (P04220). |
| Open vs. Gross Amounts by Supplier (P04220X\|W04220XA) | Use this chart to review the open and gross amounts by various suppliers across jobs with job type = "JB". The amounts are displayed in descending order by open amount.<br><br>This chart is based on the A/P Inquiry by Job program (P04220). |

For additional information about the programs associated with these charts, see:

- *Understanding the Accounts Payable Inquiry by Job Program (P04220)* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide*
- *Setting Up Jobs* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide*
- *One View Equipment Status Inquiry (P13400)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Project Execution page:

| Task | Description |
|---|---|
| Job Status Inquiry | Use this task to access the Job Status Inquiry program (P512000). |
| Job Master | Use this task to access the Job Cost Master Revisions program (P51006, version ZJDE0014).<br>The following form layouts are available:<br>• Job Master Overview<br>• Budget Overview<br>The following grid format is available:<br>• Simple |
| Journal Entries | Use this task to access the Journal Entry program (P0911). |
| Review Accounts Payable by Job | Use this task to access the A/P Inquiry by Job program (P04220). |
| Manage Jobs | Use this task to access the Manage Jobs page. This page enables you to review and act upon information about jobs and job logs. |
| Manage Job Forecasts | Use this task to access the Manage Job forecasts page. This page enables you to analyze job forecasts and receive alerts about job forecasts that are open or in review. |
| Change Requests | Use this task to access the Change Requests page. This page enables you to review and act upon information about change requests, including pending change requests, revenues and costs for change requests, and subcontracts and status for change requests. |
| Planned Change Orders | Use this task to access the Planned Change Orders page. This page enables you to review and act upon planned change orders, including the status of planned change orders, costs, and revenues. |
| Change Orders | Use this task to access the Change Orders page. This page enables you to review and act upon change orders, including new and pending change orders, revenues and costs for change orders, and subcontracts and status for change orders. |

For additional information about the programs accessed by these tasks, see:

- *Understanding the Accounts Payable Inquiry by Job Program (P04220)* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide*
- *Working with Batches* in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*
- *Setting Up Jobs* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide*
- *Reviewing Job Information with User Defined Columns* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide*

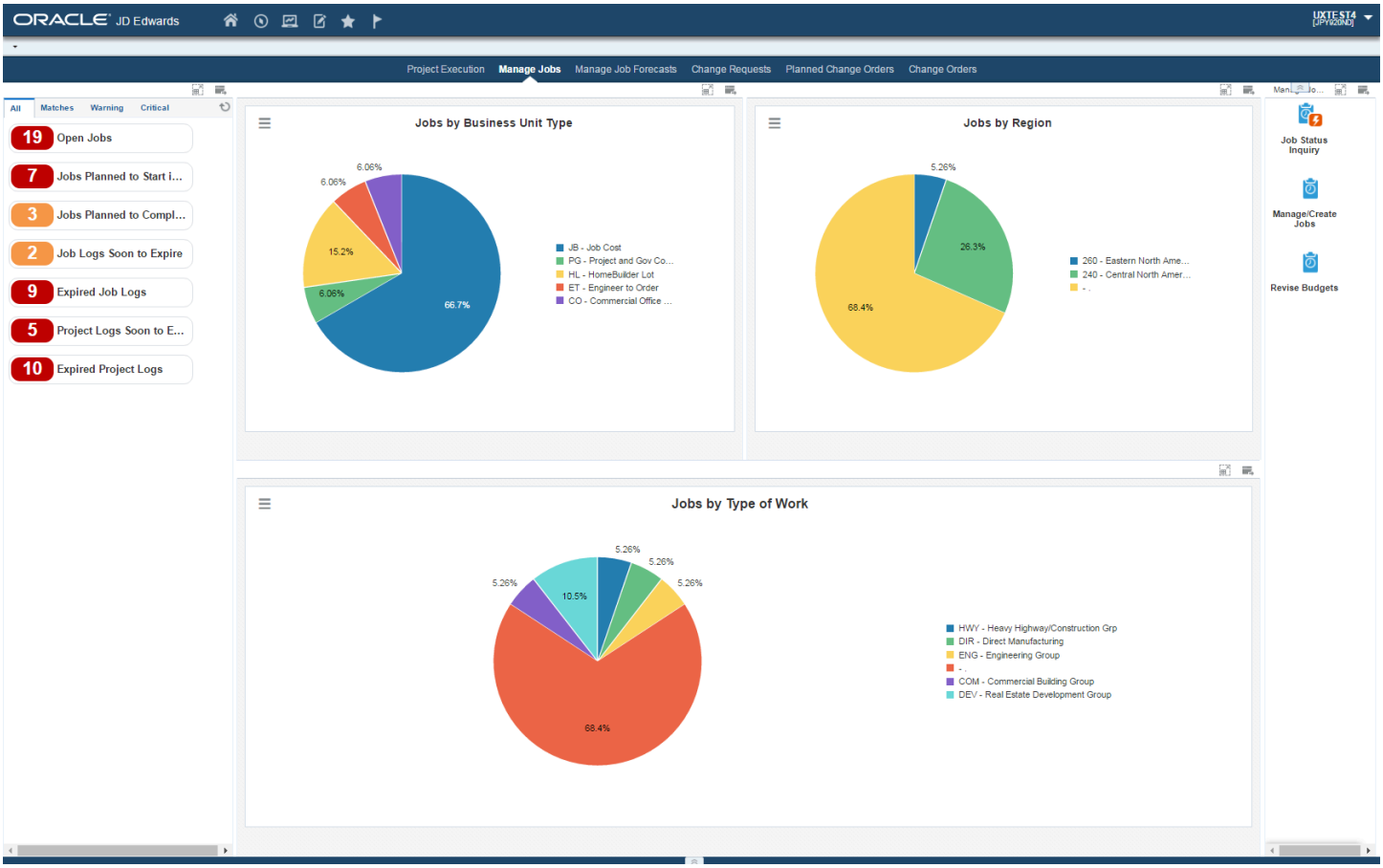
# Manage Jobs Page

The Manage Jobs page (P51001X|W51001XE) enables users to:

- Receive alerts for jobs and job logs.
- Analyze jobs by specified criteria, such as type of work and region.
- Easily access tasks related to jobs, such as revising jobs and budgets.

To access the UX One Manage Jobs page, log in to the EnterpriseOne system using the Project Manager role. When you log in with this role, the system automatically displays the Project Execution page. Click the Manage Jobs task on the springboard to access the Mange Jobs page.

This graphic illustrates the Manage Jobs page.


ORACLE JD Edwards
Project Execution
Manage Jobs
Manage Job Forecasts
Change Requests
Planned Change Orders
Change Orders
All
Matches
Warning
Critical
19 Open Jobs
7 Jobs Planned to Start i...
3 Jobs Planned to Compl...
2 Job Logs Soon to Expire
9 Expired Job Logs
5 Project Logs Soon to E...
10 Expired Project Logs
Jobs by Business Unit Type
6.06%
6.06%
15.2%
6.06%
66.7%
JB - Job Cost
PG - Project and Gov Co...
HL - HomeBuilder Lot
ET - Engineer to Order
CO - Commercial Office ...
Jobs by Region
5.26%
26.3%
68.4%
260 - Eastern North Ame...
240 - Central North Amer...
Job Status Inquiry
Manage/Create Jobs
Revise Budgets
Jobs by Type of Work
5.26%
5.26%
5.26%
5.26%
10.5%
68.4%
HWY - Heavy Highway/Construction Grp
DIR - Direct Manufacturing
ENG - Engineering Group
COM - Commercial Building Group
DEV - Real Estate Development Group

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Manage Jobs page:

| Watchlist Alert | Description |
|---|---|
| Open Jobs | This alert tells users how many jobs (business unit type = JB) exist for the search criteria that you specify.<br>This alert is based on the Job Cost Master Revisions program (P51006).<br>When you click the alert, the system displays the Work With Job Master form. The following form layouts are available:<br>• Job Master Overview<br>• Budget Overview<br>The following grid format is available:<br>• Simple |
| Jobs Planned to Start | This alert tells users how many jobs are planned to start in the time frame that you specify.<br>This watchlist is based on the Job Cost Master Revisions (P51006) program.<br>When you click the alert, the system displays the Work With Job Master form. |
| Jobs Planned to Complete | This alert tells users how many jobs are planned to be completed in the next 60 days.<br>When you click the alert, the system displays the Work with Job Master form.<br>This watchlist is based on the Job Cost Master Revisions (P51006) program.<br>The following form layouts are available:<br>• Job Master Overview<br>• Budget Overview |
| Job Logs Soon to Expire | This alert tells users about the number of job logs that are about to expire.<br>This alert is based on the Logs Entry program (P4305, version ZJDE0004).<br>When you click the alert, the system displays the Work With Logs form. |
| Expired Job Logs | This alert tells users about the number of job logs that have expired.<br>This alert is based on the Logs Entry program (P4305, version ZJDE0004).<br>When you click the alert, the system displays the Work With Logs form. |
| Project Logs Soon to Expire | This alert tells users about the number of project logs that are about to expire. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Logs Entry program (P4305, version ZJDE0003).<br><br>When you click the alert, the system displays the Work With Logs form. |
| Expired Project Logs | This alert tells users about the number of job logs that have expired.<br><br>This alert is based on the Logs Entry program (P4305, version ZJDE0003).<br><br>When you click the alert, the system displays the Work With Logs form. |

For additional information about the programs associated with these watchlist alerts, see these topics:

- *Setting Up Jobs* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide* .
- *Tracking Job Progress* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide* .
- *Working With Log Information* in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Manage Jobs page:

| Component Title | Description |
|---|---|
| Jobs by Business Unit Type (P51006X1\|W51006X1D) | Use this chart to review the percentage of open jobs by the type of business unit. The business unit types are from the Business Unit Type UDC table (00/MC).<br><br>This chart is based on the Job Cost Master Revisions program (P51006, version ZJDE0014). |
| Jobs by Type of Work (P51006X1\|W51006X1C) | Use this chart to review the percentage of jobs by the type of work for the jobs. The job types are the values in Category Code 003 in the Job Cost Master Revisions program.<br><br>This chart is based on the Job Cost Master Revisions program (P51006, version ZJDE0014). |
| Jobs by Region (P51006X1\|W51006X1B) | Use this chart to review the percentage of jobs by region. The regions are the values in Category Code 002 in the Job Cost Master Revisions program.<br><br>This chart is based on the Job Cost Master Revisions program (P51006, version ZJDE0014). |

For additional information about the programs associated with these charts, see *Setting Up Jobs* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Manage Jobs page:

| Task | Description |
|---|---|
| Job Status Inquiry | Use this task to access the Job Status Inquiry program (P512000). |
| Manage/Create Jobs | Use this task to access the Job Cost Master Revisions program (P51006, version ZJDE0014).<br>The following form layouts are available:<br>• Job Master Overview<br>• Budget Overview |
| Revise Budgets | Use this task to access the Job Cost Master Revisions program (P51006, version ZJDE0009).<br>The following form layouts are available:<br>• Job Master Overview<br>• Budget Overview<br>The following grid format is available:<br>• Simple |

For additional information about the programs accessed by these tasks, see *Setting Up Jobs* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide* .

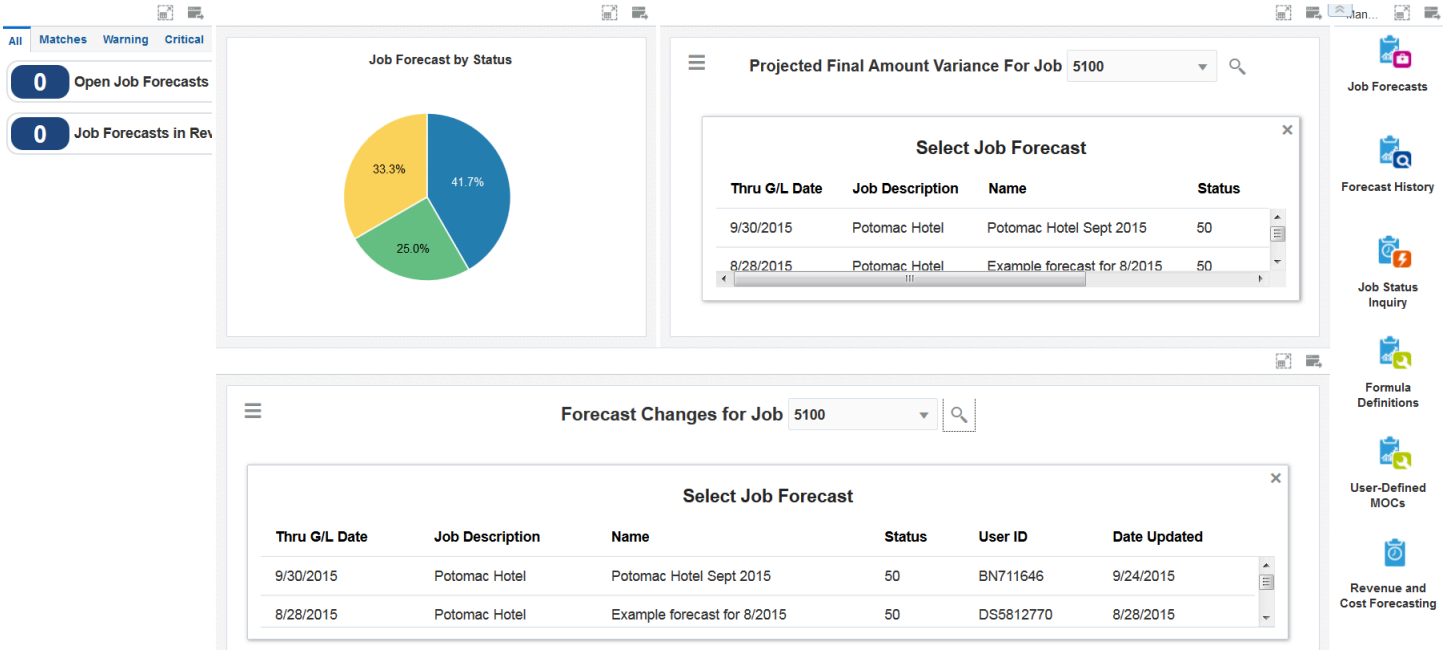
# Manage Job Forecasts Page

The Manage Job Forecasts page (P51001X|W51001XF) enables users to:

- Receive alerts for open job forecasts and job forecasts under review.
- Analyze forecasts by variance, labor productivity, and status.
- Easily access all aspects of job forecasts, including method of computation, and formula definitions.

To access the UX One Manage Job Forecasts page, log in to the EnterpriseOne system using the Project Manager role. When you log in with this role, the system automatically displays the Project Execution page. Click the Manage Job Forecasts task on the springboard to access the Mange Job Forecasts page.

This graphic illustrates the Manage Job Forecasts page.




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Manage Job Forecasts page:

| Watchlist Alert | Description |
|---|---|
| Open Job Forecasts | This alert tells you how many open job forecasts exist. This alert is based on the Job Forecast Details program (P51F100).<br><br>When you click the alert, the system displays the Work with Job Forecasts page.<br><br>The following page layout is available:<br><br>• Open Job Forecasts |
| Job Forecasts in Review | This alert tells you how many job forecasts are at the Review stage. This alert is based on the Job Forecast Details program (P51F100).<br><br>When you click the alert, the system displays the Work with Job Forecasts page.<br><br>The following page layout is available:<br><br>• Job Forecasts in Review |

For additional information about the programs associated with these watchlist alerts, see:

- *Reviewing and Approving Job Forecasts* in the *JD Edwards EnterpriseOne Applications Advanced Job Forecasting Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Manage Job Forecasts page:

| Component Title | Description |
|---|---|
| Job Forecast by Status (P51F100X\| W51F100XA) | Use this chart to review the percentage of job forecasts by each status in UDC 51F/ST (Forecast Status).<br><br>This chart is based on the Create Job Forecast program (P51F100). |
| Projected Final Variance for Job (P51F120X\| W51F120XA) | Use this chart to review variance information for a specific job. You select the job from a drop-down list.<br><br>This chart is based on the Job Forecast History program (P51F120). |
| Forecast Changes for Job (P51F120X\| W51F120XB) | Use this chart to review changes to a specific job forecast. You select the job from a drop-down list.<br><br>This chart is based on the Job Forecast History program (P51F120). |

For additional information about the programs associated with these charts, see:

- *Reviewing Job Forecast History* in the *JD Edwards EnterpriseOne Applications Advanced Job Forecasting Implementation Guide* .

- *Creating Job Forecasts* in the *JD Edwards EnterpriseOne Applications Advanced Job Forecasting Implementation Guide*
- *Tracking Job Process* in the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide* .

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Manage Job Forecasts page:

| Task | Description |
|---|---|
| Job Forecasts | Use this task to access the Work with Job Forecasts form in the Create Job Forecasts program (P51F100). |
| Forecast History | Use this task to access the Work with Job Forecast History form in the Job Forecast History program (P51F120). |
| Job Status Inquiry | Use this task to access the Job Status Inquiry form in the Job Status Inquiry program (P512000). |
| Formula Definitions | Use this task to access the Work with Formula Definitions form in the Formula Definitions program (P51F90). |
| User-Defined MOCs | Use this task to access the Work with User-Defined Method of Computation form in the User-Defined Methods of Computation program (P51F95). |
| Revenue and Cost Forecasting | Use this task to access the Work with Forecasts form in the Work with Forecasts Program (P5111). |

For additional information about the programs accessed by these tasks, see:

- In the *JD Edwards EnterpriseOne Applications Advanced Job Forecasting Implementation Guide* :
  - *Reviewing Job Forecast History*.
  - *Creating Job Forecasts*
- In the *JD Edwards EnterpriseOne Applications Job Cost Implementation Guide* :
  - *Tracking Job Process*
  - *Forecasting Job Revenue and Cost*
- In the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* :
  - *Reviewing Change Requests*
  - *Creating User-Defined Methods of Computation for Job Forecasts*

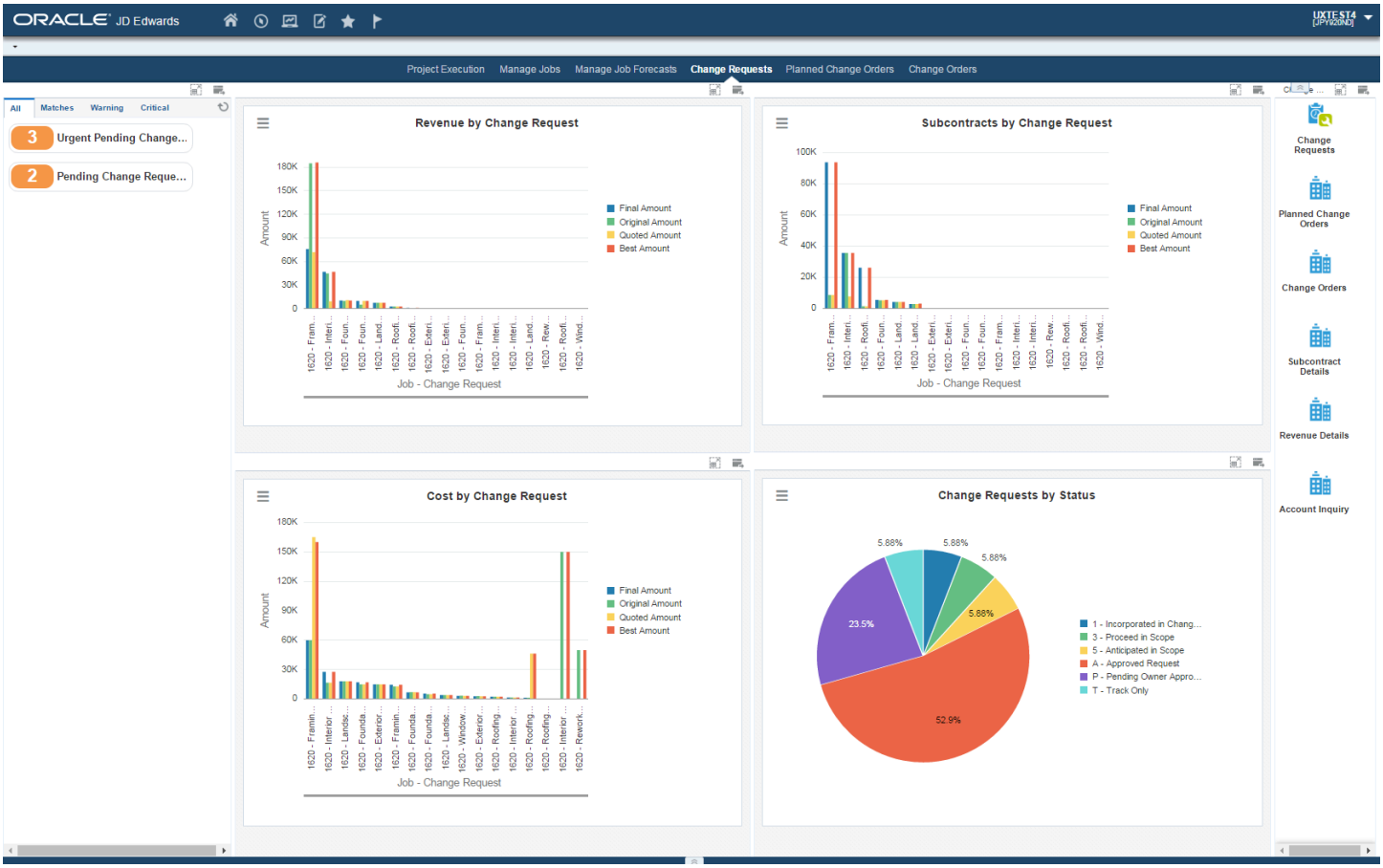
# Change Requests Page

The Change Requests page (P51001X|W51001XD) enables users to:

- Receive alerts about pending change requests.
- Analyze revenues and costs for change requests, and subcontracts and status for change requests.
- Easily access all aspects of a job throughout the entire project lifecycle.

To access the UX One Change Requests page, log in to the EnterpriseOne system using the Project Manager role. When you log in with this role, the system automatically displays the Project Execution page. Click the Change Requests task on the springboard to access the Change Requests page.

This graphic illustrates the Change Requests page:


ORACLE JD Edwards
Project Execution
Manage Jobs
Manage Job Forecasts
Change Requests
Planned Change Orders
Change Orders
All
Matches
Warning
Critical
3 Urgent Pending Change...
2 Pending Change Reque...
Revenue by Change Request
Amount
Final Amount
Original Amount
Quoted Amount
Best Amount
Job - Change Request
Subcontracts by Change Request
Cost by Change Request
Change Requests by Status
5.88%
23.5%
52.9%
1 - Incorporated in Chang...
3 - Proceed in Scope
5 - Anticipated in Scope
A - Approved Request
P - Pending Owner Appro...
T - Track Only
Change Requests
Planned Change Orders
Change Orders
Subcontract Details
Revenue Details
Account Inquiry

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Change Requests page:

| Watchlist Alert | Description |
|---|---|
| Urgent Pending Change Requests | This alert tells users how many change requests are pending (status = P) and urgent (priority code = U).<br><br>This alert is based on the Change Request Entry program (P5310).<br><br>When you click the alert, the system displays the Work With Change Requests form. The following form layout is available:<br><br>• Change Request Overview<br>The following grid format is available:<br><br>• Simple |
| Pending Change Requests | This alert tells users how many change requests are pending (status = P).<br><br>This alert is based on the Change Request Entry program (P5310).<br><br>When you click the alert, the system displays the Work With Change Requests form. The following form layout is available:<br><br>• Change Request Overview<br>The following grid format is available:<br><br>• Simple |

For additional information about the program accessed by these alerts, see *Creating Change Requests* in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Change Requests page:

| Component Title | Description |
|---|---|
| Revenue by Change Request (P5301BJX\|W5301BJXA) | Use this chart to review the original, quoted, best, and final revenue amounts for change requests.<br><br>This chart is based on the V5301JBA view, which is based on the Change Request Master (F5301B), Change Request Details (F5311), and Planned Change Order Master (F5314) tables. |

| Component Title | Description |
|---|---|
| | |
| Cost by Change Request (P5301BJX\|W5301BJXB) | Use this chart to review the original, quoted, best, and final costs for change requests.<br><br>This chart is based on the V5301JBA view, which is based on the Change Request Master (F5301B), Change Request Details (F5311), and Planned Change Order Master (F5314) tables. |
| Subcontracts by Change Request (P5301BJX\|W5301BJXC) | Use this chart to review the original, quoted, best, and final subcontracts for change requests.<br><br>This chart is based on the V5301JBA view, which is based on the Change Request Master (F5301B), Change Request Details (F5311), and Planned Change Order Master (F5314) tables. |
| Change Requests by Status (P5310X\|W5310XA) | Use this chart to review the percentage of change requests that are at each status.<br><br>This chart is based on the Change Request Entry program (P5310). |

For additional information about the program associated with these charts, see *Creating Change Requests* in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Change Requests page:

| Task | Description |
|---|---|
| Change Requests | Use this task to access the Change Request Entry program (P5310).<br><br>The following form layout is available:<br><br>• Change Request Overview<br>The following grid format is available:<br><br>• Simple |
| Planned Change Orders | Use this task to access the Work With Planned Change Orders form in the Planned Change Order Entry program (P5314). |
| Change Orders | Use this task to access the Work With Change Orders form in the Change Order Entry program (P5315). |
| Subcontract Details | Use this task to access the Subcontract Detail/Commit form in the Change Request for Subcontract Details program (P53301). |
| Revenue Details | Use this task to access the Work With Revenue Details/Commit form in the Change Request Revenue Details Program (P53311). |
| Account Inquiry | Use this task to access the Work With Account Change Request Inquiry form in the Account Inquiry program (P53220). |

For additional information about the programs accessed by these tasks, see the following topics in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* :

- *Creating Change Requests*
- *Creating Change Management Hierarchy*
- *Working with Subcontracts*
- *Working with Contract Commitments*
- *Reviewing Change Requests*

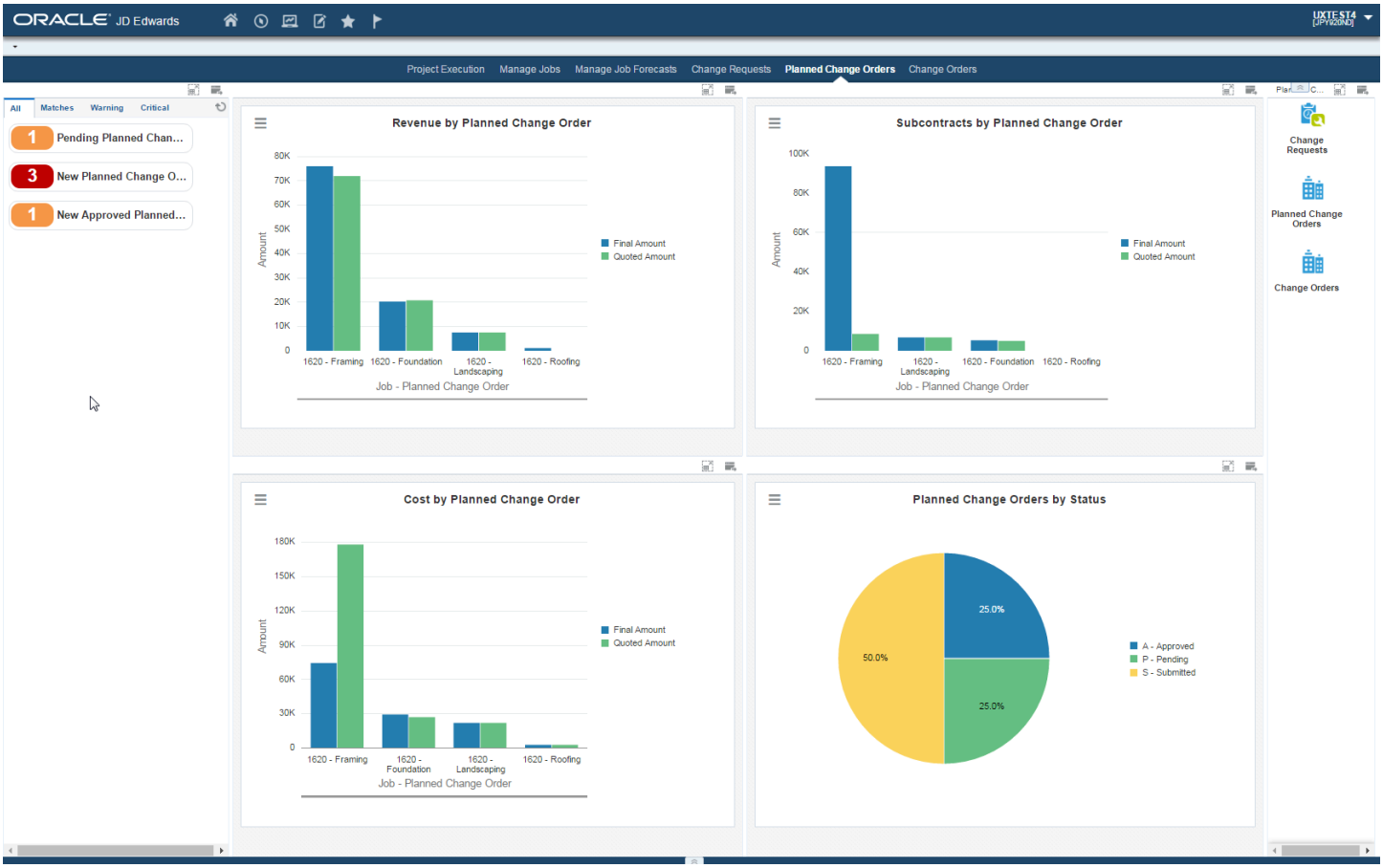
# Planned Change Orders Page

The Planned Change Orders page (P51001X|W51001XC) enables users to:

- Receive alerts regarding planned change orders.
- Analyze multiple aspects for planned change orders such as costs and revenues.
- Easily access tasks related to planned change orders.

To access the UX One Planned Change Orders page, log in to the EnterpriseOne system using the Project Manager role. When you log in with this role, the system automatically displays the Project Execution page. Click the Planned Change Orders task on the springboard to access the Mange Jobs page.

This graphic illustrates the Planned Change Orders page:


ORACLE JD Edwards
Project Execution
Manage Jobs
Manage Job Forecasts
Change Requests
Planned Change Orders
Change Orders
All
Matches
Warning
Critical
1 Pending Planned Chan...
3 New Planned Change O...
1 New Approved Planned...
Revenue by Planned Change Order
Amount
Final Amount
Quoted Amount
1620 - Framing
1620 - Foundation
1620 - Landscaping
1620 - Roofing
Job - Planned Change Order
Subcontracts by Planned Change Order
Cost by Planned Change Order
Planned Change Orders by Status
25.0%
50.0%
25.0%
A - Approved
P - Pending
S - Submitted
Change Requests
Planned Change Orders
Change Orders

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Planned Change Orders page:

| Watchlist Alert | Description |
|---|---|
| Pending Planned Change Orders | This alert tells users how many planned change orders are pending (status = P).<br><br>This alert is based on the Planned Change Order Entry program (P5314).<br><br>When you click the alert, the system displays the Work With Planned Change Orders form. |
| New Planned Change Orders | This alert tells users how many change orders are at status S (submitted) or P (pending) and are within the time frame that you specify.<br><br>This alert is based on the Planned Change Order Entry program (P5314).<br><br>When you click the alert, the system displays the Work With Planned Change Orders form. |
| New Approved Planned Change Orders | This alert tells users how many change orders are at status A (approved) and are within the time frame that you specify.<br><br>This alert is based on the Planned Change Order Entry program (P5314).<br><br>When you click the alert, the system displays the Work With Planned Change Orders form. |

For additional information about the program associated with these watchlist alerts, see *Creating Change Requests* in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Planned Change Orders page:

| Component Title | Description |
|---|---|
| Revenue by Planned Change Order (P5314X\|W5314XA) | Use this chart to view the original, quoted, and final revenue for planned change orders.<br><br>This chart is based on the Planned Change Order Entry program (P5314). |
| Cost by Planned Change Order (P5314X\|W5314XB) | Use this chart to view the original, quoted, and final cost for planned change orders.<br><br>This chart is based on the Planned Change Order Entry program (P5314). |

| Component Title | Description |
|---|---|
| Subcontracts by Planned Change Order (P5314X\|W5314XC) | Use this chart to view the original, quoted, and final amounts for planned change orders by subcontracts.<br><br>This chart is based on the Planned Change Order Entry program (P5314). |
| Planned Change Orders by Status (P5314X\|W5314XD) | Use this chart to view the percentage of planned change orders at each status.<br><br>This chart is based on the Planned Change Order Entry program (P5314). |

For additional information about the program associated with these charts, see *Creating Change Requests* in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Planned Change Orders page:

| Task | Description |
|---|---|
| Change Requests | Use this task to access the Work With Change Requests form in the Change Request Entry program (P5310).<br><br>The following form layout is available:<br><br>• Change Request Overview<br>The following grid format is available:<br><br>• Simple |
| Planned Change Orders | Use this task to access the Work With Planned Change Orders form in the Planned Change Order Entry program (P5314). |
| Change Orders | Use this task to access the Work With Change Orders form in the Change Order Entry program (P5315). |

For additional information about the programs accessed by these tasks, see the following topics in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* :

- *Creating Change Requests*
- *Creating Change Management Hierarchy*

# UX One: Change Orders Page

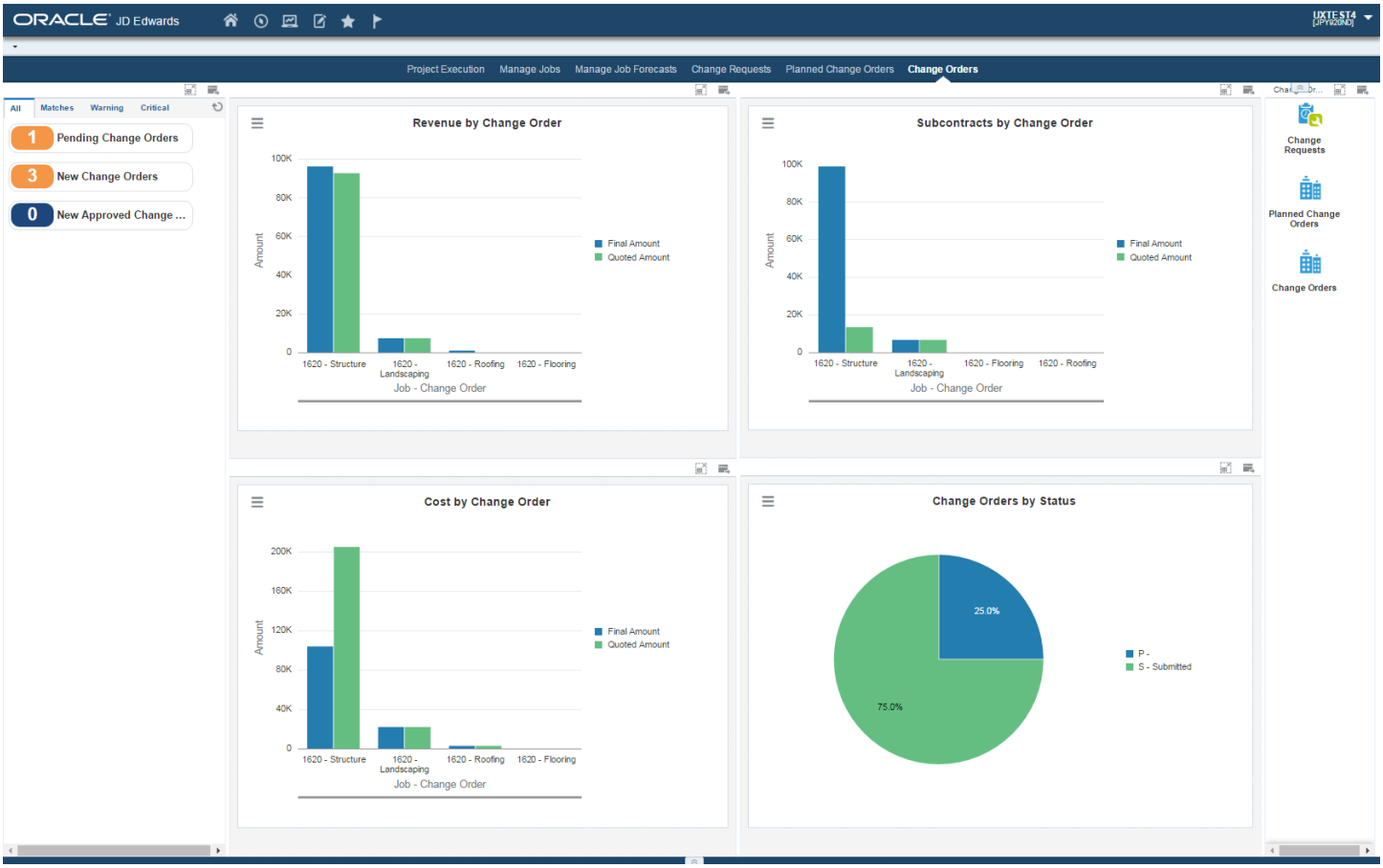
The Change Orders page (P51001X|W51001XB) enables users to:

- Receive alerts regarding new and pending change orders.
- Analyze revenues and costs for change orders, and subcontracts and status for change orders.

- Easily access programs to work with change orders.

To access the UX One Change Orders page, log in to the EnterpriseOne system using the Project Manager role. When you log in with this role, the system automatically displays the Project Execution page. Click the Change Orders task on the springboard to access the Change Orders page.

This graphic illustrates the Change Orders page:


ORACLE JD Edwards
Project Execution
Manage Jobs
Manage Job Forecasts
Change Requests
Planned Change Orders
Change Orders
All
Matches
Warning
Critical
1 Pending Change Orders
3 New Change Orders
0 New Approved Change ...
Revenue by Change Order
Amount
Final Amount
Quoted Amount
1620 - Structure
1620 - Landscaping
1620 - Roofing
1620 - Flooring
Job - Change Order
Subcontracts by Change Order
Cost by Change Order
Change Orders by Status
25.0%
75.0%
P -
S - Submitted
Change Requests
Planned Change Orders
Change Orders

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Change Orders page:

| Watchlist Alert | Description |
|---|---|
| Pending Change Orders | This alert tells users about the number of change orders at status code P (pending).<br><br>This alert is based on the Change Order Entry program (P5315). When you click the alert, the system displays the Work With Change Orders form. |
| New Change Orders | This alert tells users about the number of change orders at status code S (submitted) or P (pending), and that are within the time period specified in the query.<br><br>This alert is based on the Change Order Entry program (P5315). When you click the alert, the system displays the Work With Change Orders form. |
| New Approved Change Orders | This alert tells users about the number of change orders at status code A (approved), and that are within the time period specified in the query.<br><br>This alert is based on the Change Order Entry program (P5315). When you click the alert, the system displays the Work With Change Orders form. |

For additional information about the program associated with these watchlist alerts, see *Creating Change Requests* in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Change Orders page:

| Component Title | Description |
|---|---|
| Revenue by Change Order (P5315X\|W5315XA) | Use this chart to view the original, quoted, and final revenue for change orders.<br><br>This chart is based on the Change Order Entry program (P5315). |
| Cost by Change Order (P5315X\|W5315XB) | Use this chart to view the original, quoted, and final cost for change orders.<br><br>This chart is based on the Change Order Entry program (P5315). |
| Subcontracts by Change Order (P5315X\|W5315XC) | Use this chart to view the original, quoted, and final amounts for change orders by subcontracts. |

| Component Title | Description |
|---|---|
| | This chart is based on the Change Order Entry program (P5315). |
| Change Orders by Status (P5315X\| W5315XD) | Use this chart to view the percentage of change orders at each status.<br><br>This chart is based on the Change Order Entry program (P5315). |

For additional information about the program associated with these charts, see *Creating Change Requests* in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Change Orders page:

| Task | Description |
|---|---|
| Change Requests | Use this task to access the Change Request Entry program (P5310).<br><br>The following form layout is available:<br><br>• Change Request Overview<br>The following grid format is available:<br><br>• Simple |
| Planned Change Orders | Use this task to access the Work With Planned Change Orders form in the Planned Change Order Entry program (P5314). |
| Change Orders | Use this task to access the Work With Change Orders form in the Change Order Entry program (P5315). |

For additional information about the programs accessed by these tasks, see the following topics in the *JD Edwards EnterpriseOne Applications Change Management Implementation Guide* :

- *Creating Change Requests*
- *Creating Change Management Hierarchy*

# 46 Real Estate Management Roles: Lessee Accounting Manager (Release 9.2 Update)

## Understanding the Lessee Accounting Manager Role

The Lessee Accounting Manager role, and the associated UX One pages and components, enable users to:

- Receive alerts regarding newly leased assets, missing amortization schedules, commencement journal entry errors, asset balances that require updating, and leases that are set to expire.
- Analyze lessee lease information.
- Easily access Real Estate Management programs that enable users to manage leases.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Lessee Accounting Manager role (LSACMGRJDE), and the components listed below, your system administrator must complete the steps to associate the user ID with the LSACMGRJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Lease Administrator role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Real Estate Management.*

# Using the Lessee Accounting Manager Role

You use the Lessee Accounting Manager Role to access the Lessee Accounting Manager page (P15004X|W15004XA).

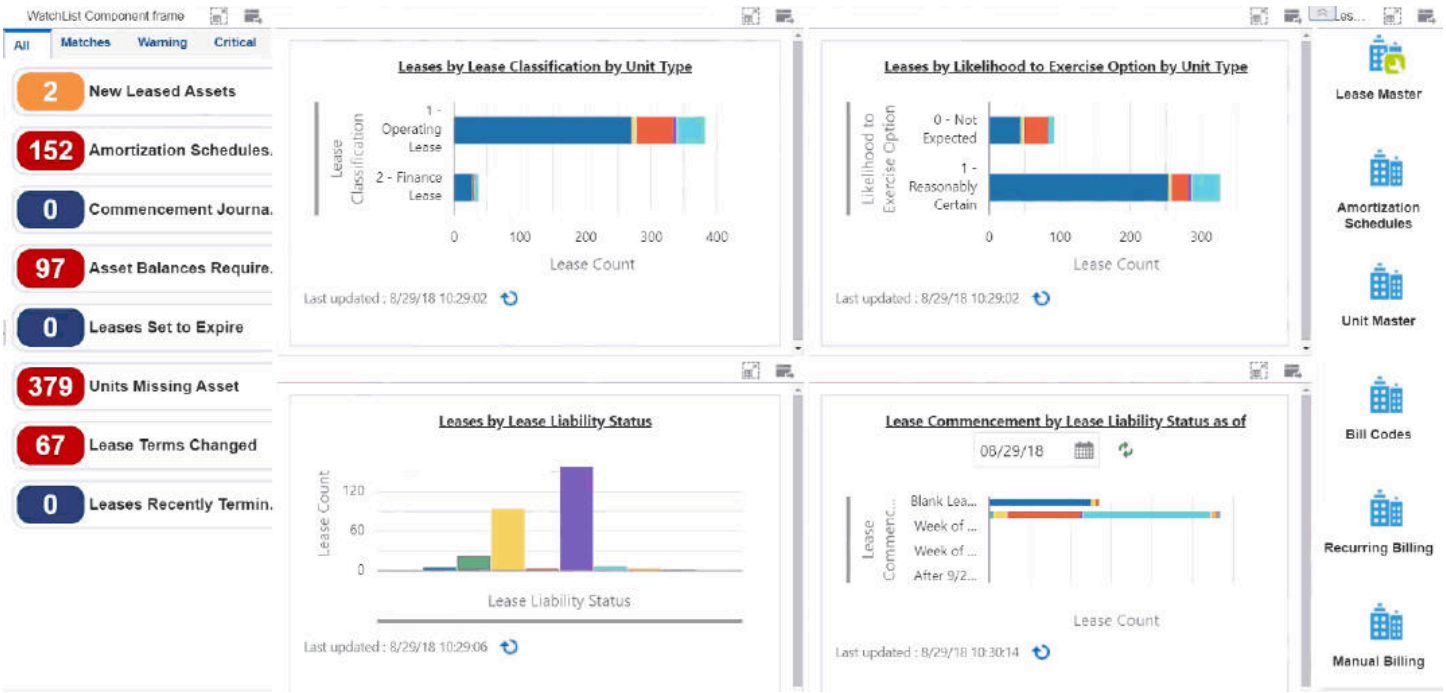
## UX One: Lessee Accounting Manager Page

The Lessee Accounting Manager page (P15004X|W15004XA) enables users to:

- Receive alerts regarding newly leased assets, missing amortization schedules, commencement journal entry errors, asset balances that require updating, and leases that are set to expire.
- Analyze lessee lease information.
- Easily access Real Estate Management programs that enable users to manage leases.

To access the UX One Lessee Accounting Manager page, log in to the EnterpriseOne system using the Lessee Accounting Manager role.

This graphic illustrates the Lessee Accounting Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Lessee Accounting Manager page:

| Watchlist Alert | Description |
|---|---|
| New Leased Assets | This alert tells users how many new assets have been leased within the last 60 days. The system displays leases with a lease commencement date in the last 60 days.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats are available:<br><br>• Basic<br>• Simple<br>The following form layouts are available:<br><br>• Lease Liability Schedule |
| Amortization Schedules Missing | This alert tells users when leases have been created, but are not yet at a lease classification status of 20.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats are available:<br><br>• Basic<br>• Simple<br>The following form layouts are available:<br><br>• Lease Liability Schedule |
| Commencement Journal Errors | This alert tells users when leases have commencement journal entries in error, and are at a lease classification status of 35.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats are available:<br><br>• Basic<br>• Simple<br>The following form layouts are available:<br><br>• Lease Liability Schedule |
| Asset Balances Require Update | This alert tells users when journal entries for a leased asset have not been created in more than 30 days. The system displays leases with the Lessee Accounting Thru Date is older than 30 days.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats are available:<br><br>• Basic<br>• Simple<br>The following form layouts are available:<br><br>• Lease Liability Schedule |

| Watchlist Alert | Description |
|---|---|
| Leases Set to Expire | This alert tells users how many leases are set to expire within the specified time frame. The system displays leases with a space available date between the system date and the next 60 days.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats are available:<br><br>• Basic<br>• Simple<br>The following form layouts are available:<br><br>• Lease Liability Schedule |
| Units Missing Assets | This alert tells users whether there are units with the lessee flag turned on that do not have an asset number.<br><br>When you click this alert, the system displays the Work With Units form. The following grid format is available:<br><br>• Basic<br>The following form layout is available:<br><br>• Unit Master Revisions |
| Lease Terms Changed | This alert tells users whether there are any leases where the terms have changed and have not been either terminated early or remeasured. (Recalculate Lease Liability flag not equal to 0).<br><br>When you click this alert, the system displays the Work with Amortization Schedules form. The following grid formats are available:<br><br>• Basic<br>• Simple<br>The following form layouts are available:<br><br>• Lease Liability Schedule |
| Leases Recently Terminated | This alert tells users whether there are any leases that have been terminated within the last 30 days. (Lease Liability Status = 55, Lessee Accounting JE Thru Date between today minus 30 and today.)<br><br>When you click this alert, the system displays the Work with Amortization Schedules form. The following grid formats are available:<br><br>• Basic<br>• Simple<br>The following form layouts are available:<br><br>• Lease Liability Schedule |

For additional information about the programs used by these watchlists, see *Balance Sheet Lessee Accounting (Release 9.2)* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* .

## Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Lessee Accounting Manager page:

| Component Title | Description |
|---|---|
| Leases by Lease Classification by Unit Type (P15171X\|W15171XC) | Use this chart to view leases by lease classification and unit type.<br><br>This chart is based on the Work With Amortization Schedules program (P15171). |
| Leases by Likelihood to Exercise Option by Unit Type (P15171X\|W15171XD) | Use this chart to view leases by their likelihood to exercise option and by unit type.<br><br>This chart is based on the Work With Amortization Schedules program (P15171). |
| Leases by Lease Liability Status (P15171X\|W15171XE) | Use this chart to view leases by their lease liability status codes.<br><br>This chart is based on the Work With Amortization Schedules program (P15171). |
| Lease Commencement by Lease Liability Status (P15171X\|W15171XF) | Use this chart to view leases that are scheduled to commence in the next 4 weeks, from the specified date, by lease liability status code. The chart groups all leases that fall outside of the 4-week range in separate bars, and also includes a separate bar for all leases without a lease commencement date.<br><br>This chart is based on the Work With Amortization Schedules program (P15171). |

For additional information about the programs used by these charts, see *Balance Sheet Lessee Accounting (Release 9.2)* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* .

## Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Lessee Accounting Manager page:

| Task | Description |
|---|---|
| Lease Master | Use this task to access the Lease Master program (P1501, Version ZJDE0003).<br><br>The following grid formats are available:<br><br>• Basic<br>• Simple<br>• Equipment Leases<br>• Property Leases<br>The following form layout is available:<br><br>• Recurring Billing<br><br>Note that the Equipment Lease and Property Lease grid formats have also been added to the Recurring Billing program, which is used with this form layout.<br>The following personal forms are available: |

| Task | Description |
|---|---|
| | • Basic<br>• Simplified Lease Entry |
| Amortization Schedules | Use this task to access the Amortization Schedules program (P15171).<br>The following grid format is available:<br>• Basic<br>• Simple<br>The following form layouts are available:<br>• Lease Liability Schedule<br>The following queries are available:<br>• Leases to be remeasured (Recalculate Lease Liability = 1)<br>• Leases ending early (Recalculate Lease Liability = 2) |
| Unit Master | Use this task to access the Unit Master program (P15217).<br>The following form layouts are available:<br>• Unit Master Revisions<br>The following personal forms are available:<br>• Basic<br>The following grid formats are available:<br>• Simple |
| Bill Codes | Use this task to access the Bill Codes program (P1512). |
| Recurring Billing | Use this task to access the Recurring Billing program (P1502). |
| Manual Billing | Use this task to access the Manual Billing program (P1511). |
| Trial Balance by Subledger | Use this task to access Trial Balance by Subledger program (P09215). |

For additional information about the programs you can access from the springboard, see *Introduction to JD Edwards EnterpriseOne Real Estate Management* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* . Additionally, see *Reviewing Trial Balances, Ledgers, and Subledgers* in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide* .

# 47 Real Estate Management Roles: Lease Administrator (Release 9.2 Update)

## Understanding the Lease Administrator UX One Role

The Lease Administrator role, and the associated UX One pages and components, enable users to:

- Receive alerts regarding lease status, commencement journal entry processes, expiring leases, vacant units, and units that have recently been moved into.
- Analyze lessee lease information.
- Easily access Real Estate Management programs that enable users to manage leases.

**Note:**

The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.

You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.

See *Understanding UX One Roles*.

## Prerequisites

Before using the Lease Administrator role (LEASADMJDE), and the components listed below, your system administrator must complete the steps to associate the user ID with the LEASADMJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Lease Administrator role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Real Estate Management.*

# Using the Lease Administrator Role

You use the Lease Administrator Role to access the Lease Administrator page (P15003X|W15003XA).

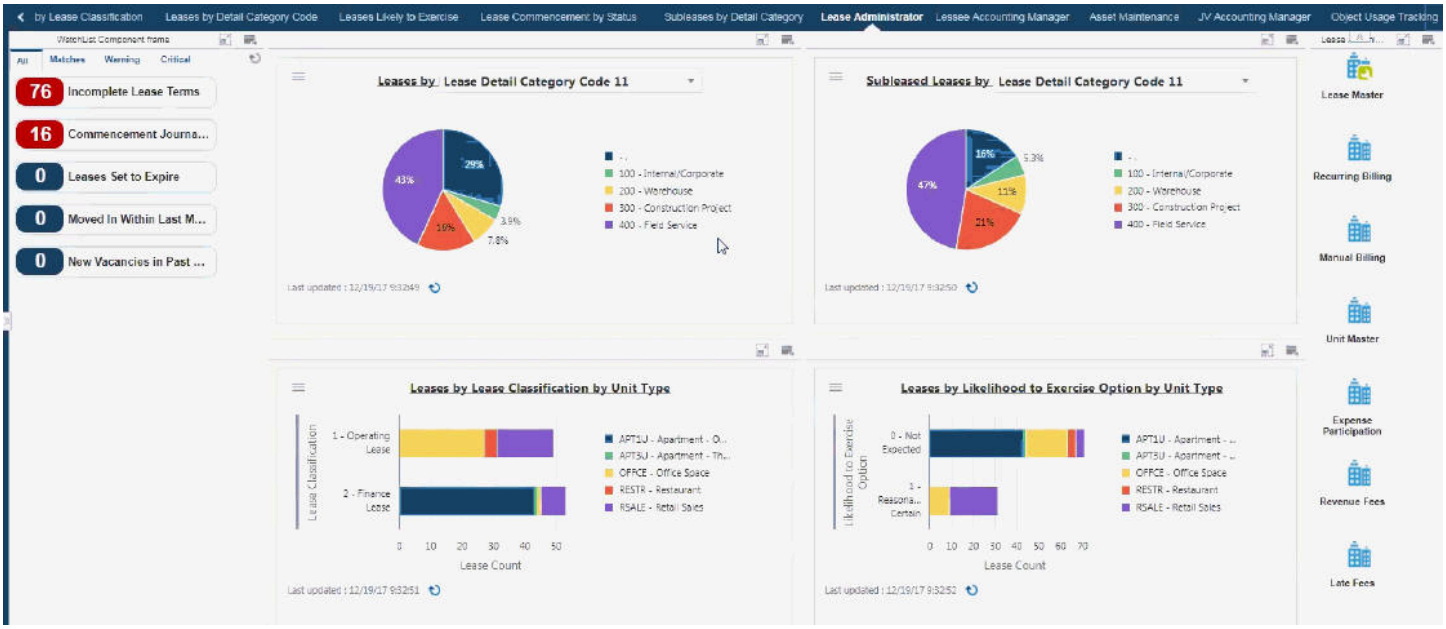
## UX One: Lease Administrator Page

The Lease Administrator page (P15003X|W15003XA) enables users to:

- Receive alerts regarding lease status, commencement journal entry processes, expiring leases, vacant units, and units that have recently been moved into.
- Analyze lessee lease information.
- Easily access Real Estate Management programs that enable users to manage leases.

To access the UX One Lease Administrator page, log in to the EnterpriseOne system using the Lease Administrator role.

This graphic illustrates the Lease Administrator page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Lease Administrator page:

| Watchlist Alert | Description |
|---|---|
| Incomplete Lease Terms | This alert tells users how many leases are still awaiting lease terms to be completed, and displays leases with a lease liability status lower than 10.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats ares available:<br><br>• Basic<br>• Simple<br>These form layouts are available:<br><br>• Lease Liability Schedule |
| Commencement Journals Needed | This alert tells users when lease commencement journal entries have not yet been created for a lease. The system displays leases with a lease liability status of 20 or 30.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats ares available:<br><br>• Basic<br>• Simple<br>These form layouts are available:<br><br>• Lease Liability Schedule |
| Leases Set to Expire | This alert tells users the number of leases that are set to expire. The system displays leases that have a space available date that is the system date through the next 60 days.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats ares available:<br><br>• Basic<br>• Simple<br>These form layouts are available:<br><br>• Lease Liability Schedule |
| Moved In Within the Last Month | This alert tells users how many units have been moved into within the last month. The system displays leases with a Move In Date in the last 30 days.<br><br>When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats ares available:<br><br>• Basic<br>• Simple<br>These form layouts are available:<br><br>• Lease Liability Schedule |
| New Vacancies in Past Month | This alert tells users how many new vacancies there have been in the past month. The system displays leases with a move out date in the last 30 days. |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the Work With Amortization Schedules form. The following grid formats ares available:<br>• Basic<br>• Simple<br>These form layouts are available:<br>• Lease Liability Schedule |

For additional information about the programs used by these watchlists, see *Balance Sheet Lessee Accounting (Release 9.2)* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* .

## Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Lease Administrator page:

| Component Title | Description |
|---|---|
| Leases by Lease Detail Category Codes 11 through 15 (P15171X\|W15171XA) | Use this chart to view leases by one of 5 lease detail category codes.<br>This chart is based on the Work With Amortization Schedules program (P15171). |
| Subleased Leases by Lease Detail Category Codes 11 through 15 (P15171X\|W15171XB) | Use this chart to view leases that are classified as subleases by one of 5 lease detail category codes.<br>This chart is based on the Work With Amortization Schedules program (P15171). |
| Leases by Lease Classification by Unit Type (P15171X\|W15171XC) | Use this chart to view leases by lease classification and unit type.<br>This chart is based on the Work With Amortization Schedules program (P15171). |
| Leases by Likelihood to Exercise Option by Unit Type (P15171X\|W15171XD) | Use this chart to view leases by their likelihood to exercise option and by unit type.<br>This chart is based on the Work With Amortization Schedules program (P15171). |

For additional information about the programs used by these charts, see *Balance Sheet Lessee Accounting (Release 9.2)* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* .

## Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Lease Administrator page:

| Task | Description |
|---|---|
| Lease Master | Use this task to access the Lease Master program (P1501, Version ZJDE0001).<br>The following grid formats are available:<br>• Basic<br>• Simple<br>• Equipment Leases<br>• Property Leases<br>The following form layout is available:<br>• Recurring Billing<br>Note that the Equipment Lease and Property Lease grid formats have also been added to the Recurring Billing program, which is used with this form layout.<br>The following personal forms are available:<br>• Basic<br>• Simplified Lease Entry |
| Recurring Billing | Use this task to access the Recurring Billing program (P1502). |
| Manual Billing | Use this task to access the Manual Billing program (P1511). |
| Unit Master | Use this task to access the Unit Master program (P15217).<br>The following form layouts are available:<br>• Unit Master Revisions<br>The following grid formats are available:<br>• Simple<br>• Basic |
| Expense Participation | Use this task to access the Expense Participation program (P15012). |
| Revenue Fees | Use this task to access the Revenue Fee Master program (P1505).<br>The following form layouts are available:<br>• Revenue Fees and Revisions |
| Late Fees | Use this task to access the Fees and Interest program (P1525). |

For additional information about the programs you can access from the springboard, see *Introduction to JD Edwards EnterpriseOne Real Estate Management* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* .

# 48 Real Estate Management Roles: Property Manager (Release 9.2 Update)

## Understanding the Property Manager UX One Role

The Property Manager role, and the associated UX One pages and components, enable users to:

- Receive alerts regarding critical dates, vacancies, and other property-related activities.
- Analyze vacancy details and tenant information.
- Easily access real estate inquiry programs.

The Property Manager pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Property Manager role (PROPMGRJDE), and the components listed below, your system administrator must complete the steps to associate the user ID with the PROPMGRJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Property Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Real Estate Management.*

# Using the Property Manager UX One Role

You use the Property Manager role to access these UX One pages:

- Property Manager (P15001X|W15001XA)
- Billing (P15001X|W15001XB)
- Lease Management (P15001X|W15001XC)
- Sales (P15001X|W15001XD)

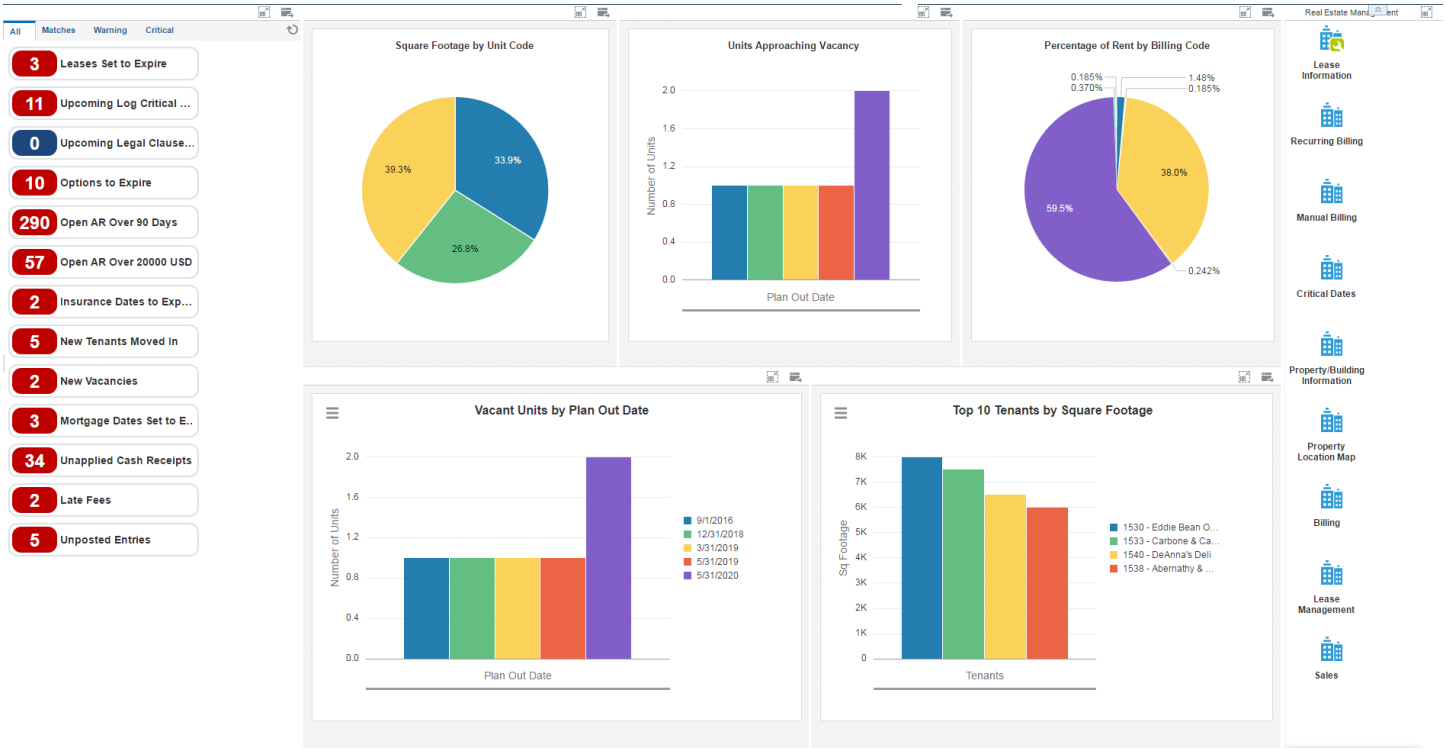
## UX One: Property Manager Page

The Property Manager page (P15001X|W15001XA) enables users to:

- Receive alerts regarding critical dates, vacancies, insurance and mortgage expiration dates, and late fees.
- Analyze vacancies, tenants, stack plan, invoices, and customer information.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Property Manager page, log in to the EnterpriseOne system using the Property Manager role.

This graphic illustrates the Property Manager page:


All
Matches
Warning
Critical
3 Leases Set to Expire
11 Upcoming Log Critical ...
0 Upcoming Legal Clause...
10 Options to Expire
290 Open AR Over 90 Days
57 Open AR Over 20000 USD
2 Insurance Dates to Exp...
5 New Tenants Moved In
2 New Vacancies
3 Mortgage Dates Set to E..
34 Unapplied Cash Receipts
2 Late Fees
5 Unposted Entries
Square Footage by Unit Code
33.9%
39.3%
26.8%
Units Approaching Vacancy
Number of Units
Plan Out Date
Percentage of Rent by Billing Code
0.185%
0.370%
1.48%
0.185%
38.0%
59.5%
0.242%
Lease Information
Recurring Billing
Manual Billing
Critical Dates
Property/Building Information
Property Location Map
Billing
Lease Management
Sales
Vacant Units by Plan Out Date
Number of Units
Plan Out Date
9/1/2016
12/31/2018
3/31/2019
5/31/2019
5/31/2020
Top 10 Tenants by Square Footage
Sq Footage
Tenants
1530 - Eddie Bean O...
1533 - Carbone & Ca...
1540 - DeAnna's Deli
1538 - Abernathy & ...

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Property Manager page:

| Watchlist Alert | Description |
|---|---|
| Leases Set to Expire | This alert tells users about leases that are due to expire.<br>This alert is based on the Work with Leases program (P1501).<br>When you click the alert, the system displays the Work with Leases form. The following form layouts are available:<br>• Rent Steps-Log Details Layout<br>• Leases and Revisions |
| Upcoming Log Critical Dates | This alert tells users about critical dates for upcoming logs.<br>This alert is based on the Work with Log Details Critical Dates program (P15204).<br>When you click the alert, the system displays the Work with Log Details Critical Dates form. The following form layout is available:<br>• Lease Master Revision - Layout |
| Upcoming Legal Clause Critical Dates | This alert tells users about upcoming critical dates regarding any legal clause.<br>This alert is based on the Legal Clause Critical Dates Inquiry program (P1570S).<br>When you click the alert, the system displays the Legal Clause Critical Dates Inquiry form. |
| Options to Expire | This alter tells users about the options that are soon to expire.<br>This alert is based on the Work With Legal Clauses program (P1570).<br>When you click the alert, the system displays the Work With Legal Clauses form. The following form layout is available:<br>• Clause Amount Revisions Layout |
| Open AR Over 90 Days | This alert tells users about receivables open for more than 90 days.<br>This alert is based on the Work with Tenant Ledger Inquiry program (P15222).<br>When you click the alert, the system displays the Work with Tenant Ledger Inquiry form. The following form layout is available:<br>• Tenant Ledger Invoice Entry |
| Open AR Over $20000 | This alert tells users about open receivables that are more than or equal to $20,000.<br>This alert is based on the Work with Tenant Ledger Inquiry program (P15222) |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the Work with Tenant Ledger Inquiry form. The following form layout is available:<br>• Tenant Ledger Invoice Entry |
| Insurance Dates to Expire | This alert tells users about insurance policies that are soon to expire.<br>This alert is based on the Work with Log Detail Critical Dates program (P15204)<br>When you click the alert, the system displays the Work with Log Detail Critical Dates form. The following form layout is available:<br>• Lease Master Revision - Layout |
| Mortgage Dates Set to Expire | This alert tells users about any mortgage dates that are about to expire.<br>This alert is based on the Work with Log Detail Critical Dates program (P15204).<br>When you click the alert, the system displays the Work with Log Detail Critical Dates form. The following form layout is available:<br>• Lease Master Revision - Layout |
| New Tenants Moved In | This alert tells users about any new tenants that have moved in.<br>This alert is based on the Work with Leases program (P1501).<br>When you click the alert, the system displays the Work with Leases form. The following form layouts are available:<br>• Rent Steps-Log Details Layout<br>• Leases and Revisions |
| New Vacancies | This alert tells users about the number of new vacancies that are available.<br>This alert is based on the Work with Leases program (P1501).<br>When you click the alert, the system displays the Work with Leases form. The following form layouts are available:<br>• Rent Steps-Log Details Layout<br>• Leases and Revisions |
| Unapplied Cash Receipts | This alert tells users about any unapplied cash receipts.<br>This alert is based on the Work With Customer Receipts Inquiry program (P15103).<br>When you click the alert, the system displays the Work With Customer Receipts Inquiry form. The following form layout is available:<br>• Receipt Detail Layout |
| Late Fee | This alert tells users about any late fees.<br>This alert is based on the Work With Billing Transactions program (P15211).<br>When you click the alert, the system displays the Work With Billing Transactions form. |

| Watchlist Alert | Description |
|---|---|
| | |
| Unposted Entries | This alert tells users about any unposted entries.<br><br>This alert is based on the Work With Billing Transactions program (P15211).<br><br>When you click the alert, the system displays the Work With Billing Transactions form. |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide*:

- *Processing Manual Billings*
- *Processing Receipts*
- *Setting Up Tenant and Lease Information*
- *Processing Receipts*
-

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Property Manager page:

| Component Title | Description |
|---|---|
| Square Footage by Unit Code (P15260X\|W15260XE) | Use this chart to view area in square foot by unit code.<br><br>This chart is based on the One View Property Inquiry program (P15260). |
| Units Approaching Vacancy (P15260X\|W15260XC) | Use this chart to view the number of units that will be vacant by a plan-out date.<br><br>This chart is based on the One View Property Inquiry program (P15260). |
| Percentage of Rent by Billing Code (P15260X\|W15260XD) | Use this chart to view the percentage of rent by billing code.<br><br>This chart is based on the One View Property Inquiry program (P15260). |
| Vacant Units by Plan Out Date (P15260X\|W15260XB) | Use this chart to view the number of units based on plan-out date.<br><br>This chart is based on the One View Property Inquiry program (P15260). |
| Top 10 Tenants by Square Footage (P15260X\|W15260XA) | Use this chart to view the top 10 tenants based on square footage.<br><br>This chart is based on the One View Property Inquiry program (P15260). |

For additional information about the programs associated with these charts, see *One View Property Inquiry (P15260)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Property Manager page:

| Task | Description |
|---|---|
| Lease Information | Use this task to access the Lease Information - Work With Leases program (P1501).<br>The following form layouts are available:<br>• Rent Steps - Log Details Layout<br>• Leases and Revisions |
| Recurring Billing | Use this task to access the Recurring Billing - Work With Leases program (P1502). |
| Manual Billing | Use this icon to access the Manual Billing - Work with Manual Billings program (P1511). |
| Critical Dates | Use this task to access the Critical Dates - Work with Log Detail Critical Dates program (P15204).<br>The following form layout is available:<br>• Lease Master Revision - Layout |
| Property/Building Information | Use this task to access the property/building Information - Work with property/building program (P15062).<br>The following form layout is available:<br>• Log Details Layout |
| Property Location Map | Use this task to access the Property Location Map.<br>See *Viewing Properties on a Map* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* . |
| Billing | Use this task to access the Billing page (P15001X\|W15001XB). |
| Lease Management | Use this task to access the Lease Management page (P15001X\|W15001XC) |
| Sales | Use this task to access the Sales page (P15001X\|W15001XD) |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide*:

- *Setting Up Tenant and Lease Information*
- *Processing Manual Billings*

- *Setting Up Facility Information*

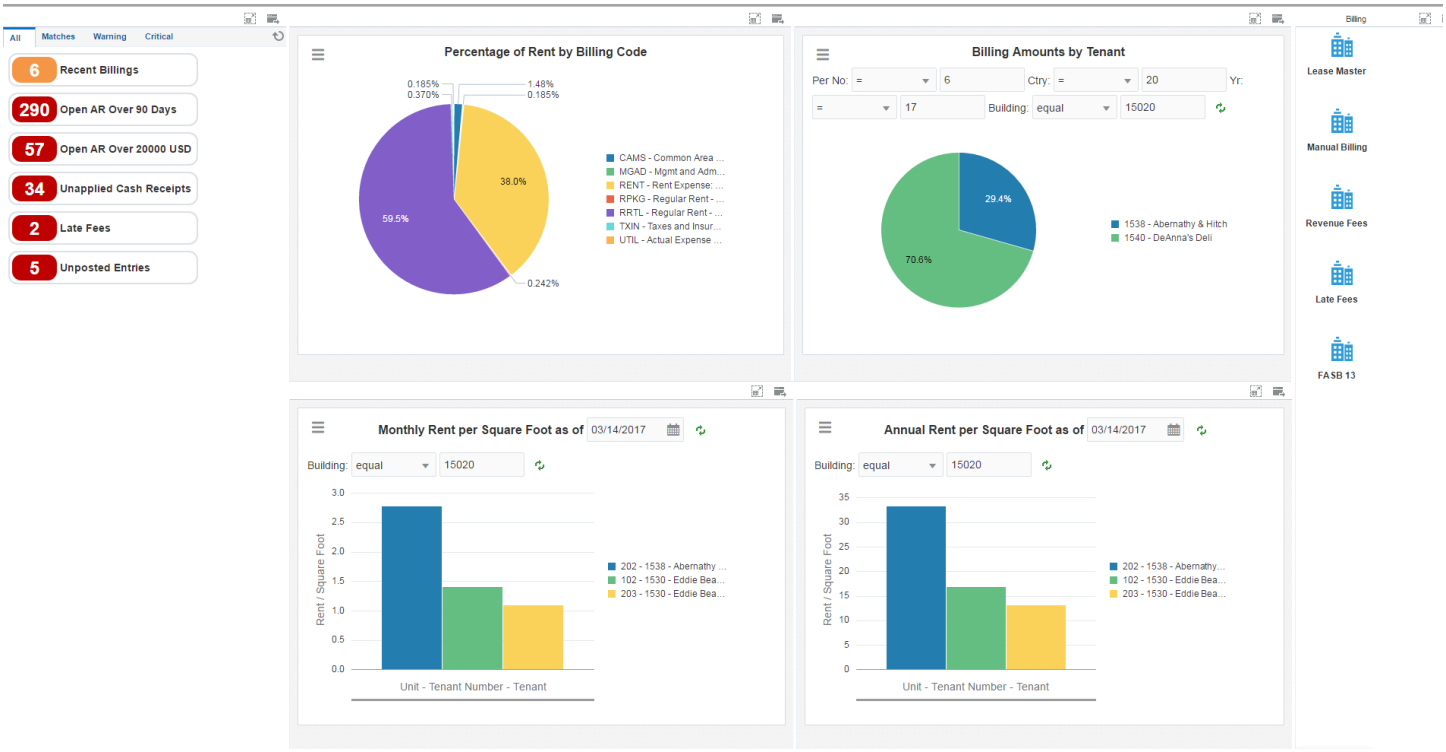
# UX One: Billing Page

The Billing page (P15001X|W15001XB) enables users to:

- Receive alerts regarding recent billings, open account receivables, unapplied cash receipts, unposted entries, and late fees.
- Analyze rent by billing code, billing amounts, monthly and annual rent per square foot.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Billing page, log in to the EnterpriseOne system using the Property Manager role. When you log in with this role, the system automatically displays the Property Manager page. Click the Billing task on the springboard to access the Billing page.

This graphic illustrates the Property Manager page:


All
Matches
Warning
Critical
6 Recent Billings
290 Open AR Over 90 Days
57 Open AR Over 20000 USD
34 Unapplied Cash Receipts
2 Late Fees
5 Unposted Entries
Percentage of Rent by Billing Code
0.185%
0.370%
1.48%
0.185%
38.0%
59.5%
0.242%
CAMS - Common Area ...
MGAD - Mgmt and Adm...
RENT - Rent Expense: ...
RPKG - Regular Rent - ...
RRTL - Regular Rent - ...
TXIN - Taxes and Insur...
UTIL - Actual Expense ...
Billing Amounts by Tenant
Per No: = 6 Ctry: = 20 Yr:
= 17 Building: equal 15020
29.4%
70.6%
1538 - Abernathy & Hitch
1540 - DeAnna's Deli
Billing
Lease Master
Manual Billing
Revenue Fees
Late Fees
FASB 13
Monthly Rent per Square Foot as of 03/14/2017
Building: equal 15020
Rent / Square Foot
3.0
2.5
2.0
1.5
1.0
0.5
0.0
Unit - Tenant Number - Tenant
202 - 1538 - Abernathy ...
102 - 1530 - Eddie Bea...
203 - 1530 - Eddie Bea...
Annual Rent per Square Foot as of 03/14/2017
Building: equal 15020
Rent / Square Foot
35
30
25
20
15
10
5
0
Unit - Tenant Number - Tenant
202 - 1538 - Abernathy...
102 - 1530 - Eddie Bea...
203 - 1530 - Eddie Bea...

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Billing page:

| Watchlist Alert | Description |
|---|---|
| Recent Billing | This alert tells users about the number of billings in the last few weeks.<br><br>This alert is based on the Work With Billing Transactions program (P15211).<br><br>When you click the alert, the system displays the Work With Billing Transactions form. |
| Open AR Over 90 Days | This alert tells users about receivables open for more than 90 days.<br><br>This alert is based on the Work with Tenant Ledger Inquiry program (P15222).<br><br>When you click the alert, the system displays the Work with Tenant Ledger Inquiry form. The following form layout is available:<br><br>• Tenant Ledger Invoice Entry |
| Open AR Over $20000 | This alert tells users about open receivables that are more than or equal to $20,000.<br><br>This alert is based on the Work with Tenant Ledger Inquiry program (P15222)<br><br>When you click the alert, the system displays the Work with Tenant Ledger Inquiry form. The following form layout is available:<br><br>• Tenant Ledger Invoice Entry |
| Unapplied Cash Receipts | This alert tells users about any unapplied cash receipts.<br><br>This alert is based on the Work With Customer Receipts Inquiry program (P15103).<br><br>When you click the alert, the system displays the Work With Customer Receipts Inquiry form. The following form layout is available:<br><br>• Receipt Detail Layout |
| Late Fee | This alert tells users about any late fees.<br><br>This alert is based on the Work With Billing Transactions program (P15211).<br><br>When you click the alert, the system displays the Work With Billing Transactions form. |
| Unposted Entries | This alert tells users about any unposted entries.<br><br>This alert is based on the Work With Billing Transactions program (P15211).<br><br>When you click the alert, the system displays the Work With Billing Transactions form. |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide*:

- *Processing Receipts*
- *Processing Manual Billings*

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Property Manager page:

| Component Title | Description |
|---|---|
| Percentage of Rent by Billing Code (P15260X\|W15260XD) | Use this chart to view the percentage of rent by billing code.<br>This chart is based on the One View Property Inquiry program (P15260). |
| Billing Amounts by Tenant (P15211X\|W15211XA) | Use this chart to view the billing amounts by various tenants in percentage.<br>This chart is based on the Work With Billing Transactions program (P15211). |
| Monthly Rent per Square Foot (P154210X\|W154210XA) | Use this chart to view the monthly rent based on square footage.<br>This chart is based on the Rent Roll Inquiry program (P154210).<br>Additionally, you can use the calendar field to adjust the date for the chart. |
| Annual Rent Per Square Foot (P154210X\|W154210XB) | Use this chart to view the annual rent based on square footage.<br>This chart is based on the Rent Roll Inquiry program (P154210).<br>Additionally, you can use the calendar field to adjust the date for the chart. |

For additional information about the programs associated with these charts, see these topics:

- *One View Property Inquiry (P15260)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Processing Manual Billings* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Billing page:

| Task | Description |
|---|---|
| Lease Master | Use this task to access the Lease Master - Work with Leases program (P15210).<br>The following form layouts are available:<br>• Leases and EP Revisions<br>• Leases and Recurring Billings |
| Manual Billing | Use this icon to access the Manual Billing - Work with Manual Billings program (P1511). |
| Revenue Fees | Use this task to access the Revenue Fees - Work With Revenue Fee Master program (P1505).<br>The following form layout is available:<br>• Revenue Fees and Revisions<br>The following grid format is available:<br>• Simple |
| Late Fees | Use this task to access the Late Fees - Work With Fees and Interest program (P1525). |
| FASB 13 | Use this task to access the FASB 13 - Work with FASB 13 program (P1513). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide*:

- *FASB 13 Standards and Processes*
- *Processing Revenue Fees*
- *Processing Recurring Billings*
- *Processing Manual Billings*

# UX One: Lease Management Page

The Lease Management page (P15001X|W15001XC) enables users to:

- Receive alerts of leases about to expire, new tenants, and recent vacancies.
- Analyze vacant units, units about to be vacated, tenants, and square footage by unit code.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Lease Management page, log in to the EnterpriseOne system using the Property Manager role. When you log in with this role, the system automatically displays the Property Manager page. Click the Lease Management task on the springboard to access the Lease Management page.

This graphic illustrates the Lease Management page:

All
Matches
Warning
Critical
3
Leases Set to Expire
5
New Tenants Moved In
2
Recent Vacancies
Units Approaching Vacancy
Number of Units
Plan Out Date
9/1/2016
12/31/2018
3/31/2019
5/31/2019
5/31/2020
Vacant Units by Plan Out Date
Number of Units
Plan Out Date
9/1/2016
12/31/2018
3/31/2019
5/31/2019
5/31/2020
Lease Management
Lease Master
Tenant Rent Roll
Top 10 Tenants by Square Footage
Sq Footage
Tenants
1530 - Eddie Bean Outl...
1533 - Carbone & Carlino
1540 - DeAnna's Deli
1538 - Abernathy & Hitch
Square Footage by Unit Code
33.9%
39.3%
26.8%
C3-
blank-.
C2-

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Lease Management page:

| Watchlist Alert | Description |
|---|---|
| Leases Set to Expire | This alert tells users about leases that are due to expire.<br>This alert is based on the Work with Leases program (P1501).<br>When you click the alert, the system displays the Work with Leases form. The following form layouts are available:<br>• Rent Steps-Log Details Layout<br>• Leases and Revisions |
| New Tenants Moved In | This alert tells users about any new tenants that have moved in.<br>This alert is based on the Work with Leases program (P1501).<br>When you click the alert, the system displays the Work with Leases form. The following form layouts are available:<br>• Rent Steps-Log Details Layout<br>• Leases and Revisions |
| Recent Vacancies | This alert tells users about the number of units that were vacated in the last few weeks.<br>This alert is based on the One View Property Inquiry program (P15260).<br>When you click the alert, the system displays the One View Property Inquiry form. |

For additional information about the programs associated with these watchlist alerts, see these topics:

- *Setting Up Tenant and Lease Information* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide*
- *One View Property Inquiry (P5260)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Lease Management page:

| Component Title | Description |
|---|---|
| Units Approaching Vacancy (P15260X\|W15260XC) | Use this chart to view the number of units that will be vacant by a plan-out date.<br>This chart is based on the One View Property Inquiry program (P15260). |
| Vacant Units by Plan Out Date (P15260X\|W15260XB) | Use this chart to view the number of units based on a plan-out date.<br>This chart is based on the One View Property Inquiry program (P15260). |
| Top 10 Tenants by Square Footage (P15260X\|W15260XA) | Use this chart to view the top 10 tenants based on square footage.<br>This chart is based on the One View Property Inquiry program (P15260). |
| Square Footage by Unit Code (P15260X\|W15260XE) | Use this chart to view area in square footage by unit code.<br>This chart is based on the One View Property Inquiry program (P15260). |

For additional information about the programs associated with these charts, see *One View Property Inquiry (P15260)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide.*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Lease Management page:

| Task | Description |
|---|---|
| Lease Master | Use this task to access the Lease Master - Work with Leases program (P1501).<br>The following form layouts are available:<br>• Leases and Revisions<br>• Rent Steps-Log Details Layout |
| Tent Rent Roll | Use this task to access the Tenant Rent Roll - Rent Roll Inquiry program (P154210).<br>The following form layout is available:<br>• Rent Roll and Detail<br>The following grid format is available:<br>• Simple |

For additional information about the programs accessed by these tasks, see *Setting Up Tenant and Lease Information* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide*.

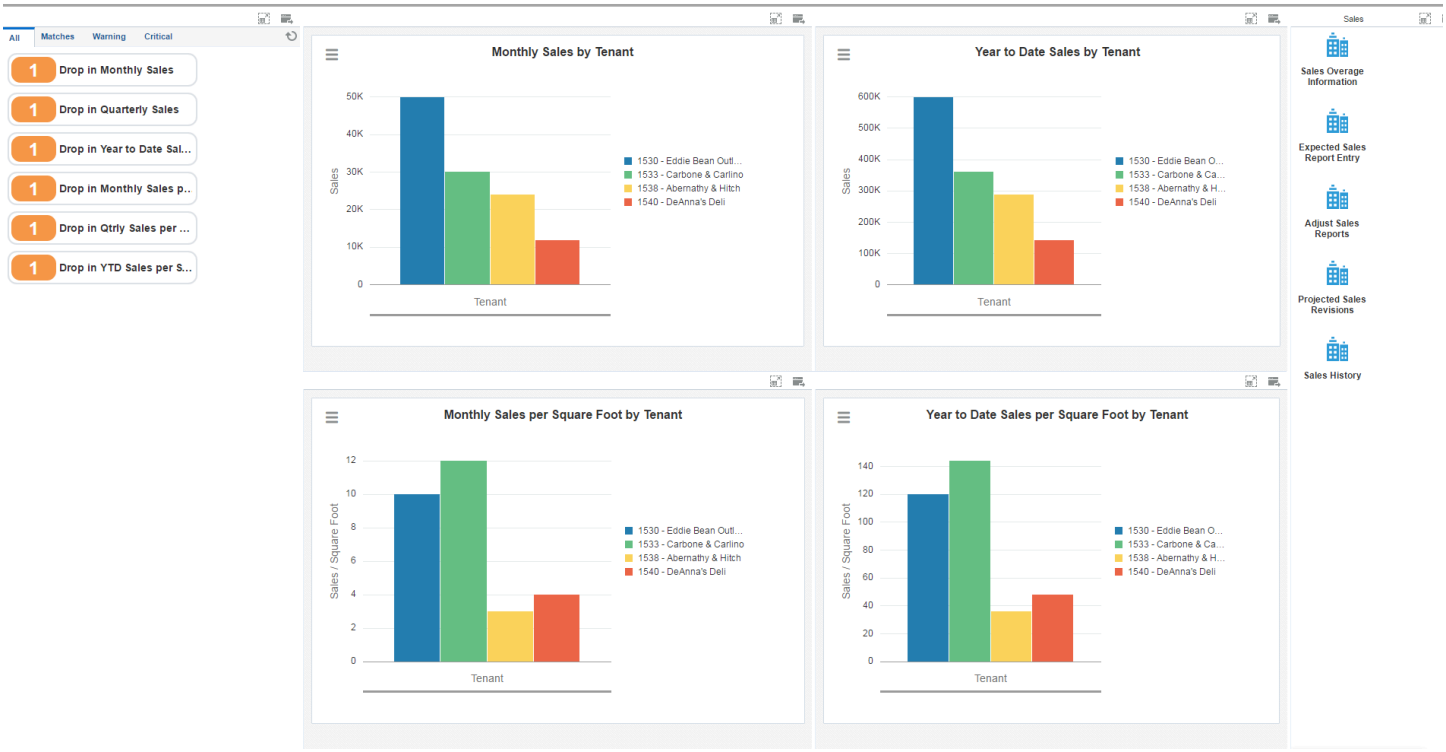
# UX One: Sales Page

The Sales page (P15001X|W15001XD) enables users to:

- Receive alerts regarding the drop in monthly, quarterly, and yearly sales.
- Analyze monthly sales and year-to-date sales.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Sales page, log in to the EnterpriseOne system using the Property Manager role. When you log in with this role, the system automatically displays the Property Manager page. Click the Sales task on the springboard to access the Sales page.

This graphic illustrates the Sales page:


All
Matches
Warning
Critical
1 Drop in Monthly Sales
1 Drop in Quarterly Sales
1 Drop in Year to Date Sal...
1 Drop in Monthly Sales p..
1 Drop in Qtrly Sales per ...
1 Drop in YTD Sales per S...
Monthly Sales by Tenant
Sales
Tenant
1530 - Eddie Bean Outl...
1533 - Carbone & Carlino
1538 - Abernathy & Hitch
1540 - DeAnna's Deli
Year to Date Sales by Tenant
Monthly Sales per Square Foot by Tenant
Sales / Square Foot
Year to Date Sales per Square Foot by Tenant
Sales
Sales Overage Information
Expected Sales Report Entry
Adjust Sales Reports
Projected Sales Revisions
Sales History

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Sales page:

| Watchlist Alert | Description |
|---|---|
| Drop in Monthly Sales | This alert tells users about the number of properties whose monthly sales has declined.<br>This alert is based on the Work With Sales Analysis program (P15043).<br>When you click the alert, the system displays the Work With Sales Analysis form. |
| Drop in Quarterly Sales | This alert tells users about the number of properties whose quarterly sales has declined.<br>This alert is based on the Work With Sales Analysis program (P15043).<br>When you click the alert, the system displays the Work With Sales Analysis form. |
| Drop in Yearly to Date Sales | This alert tells users about the number of properties whose year-to-date sales has declined.<br>This alert is based on the Work With Sales Analysis program (P15043).<br>When you click the alert, the system displays the Work With Sales Analysis form. |
| Drop in Monthly Sales Per Sq Ft | This alert tells users about the number of properties whose monthly sales per square foot has declined.<br>This alert is based on the Work With Sales Analysis program (P15043).<br>When you click the alert, the system displays the Work With Sales Analysis form. |
| Drop in Qtrly Sales per Sq Ft | This alert tells users about the number of properties whose quarterly sales per square foot has declined.<br>This alert is based on the Work With Sales Analysis program (P15043).<br>When you click the alert, the system displays the Work With Sales Analysis form. |
| Drop in YTD Sales per Sq Ft | This alert tells users about the number of properties whose year-to-date sales per square foot has declined.<br>This alert is based on the Work With Sales Analysis program (P15043).<br>When you click the alert, the system displays the Work With Sales Analysis form. |

For additional information about the programs associated with these watchlist alerts, see *Analyzing Sales* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Sales page:

| Component Title | Description |
|---|---|
| Monthly Sales by Tenant (P15043X\|W15043XA) | Use this chart to review monthly sales by various tenants.<br>This chart is based on the Work With Sales Analysis program (P15043). |
| Year to Date Sales by Tenant (P15043X\|W15043XB) | Use this chart to review year-to-date sales by various tenants.<br>This chart is based on the Work With Sales Analysis program (P15043). |
| Monthly Sales per Square Foot by Tenant (P15043X\|W15043XC) | Use this chart to review monthly sales per square foot by various tenants.<br>This chart is based on the Work With Sales Analysis program (P15043). |
| Year to Date Sales per Square Foot by Tenant (P15043X\|W15043XD) | Use this chart to review year-to-date sales per square foot by various tenants.<br>This chart is based on the Work With Sales Analysis program (P15043). |

For additional information about the programs associated with these charts, see *Analyzing Sales* in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Sales page:

| Task | Description |
|---|---|
| Sales Overage Information | Use this task to access the Sales Overage Information - Work With Sales Information program (P15013).<br>The following form layout is available:<br>• Sales Information and Revision<br>The following grid format is available:<br>• Simple |
| Expected Sales Report Entry | Use this task to access the Expected Sales Report Entry - Work With Sales Entry program (P1540, version ZJDE0001). |
| Adjust Sales Report | Use this icon to access the Adjust Sales Report - Work With Sales Entry program (P1540, version ZJDE0002). |

| Task | Description |
| --- | --- |
| Projected Sales Revisions | Use this task to access the Projected Sales Revisions - Work With Projected Sales program (P15423). |
| Sales History | Use this task to access the Sales History - Sales History Inquiry program (P1541B). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Real Estate Management Implementation Guide*:

- *Processing Sales Overage*
- *Forecasting Sales*

# 49 Rental Management Roles: Rental Operations Manager

## Understanding the Rental Operations Manager UX One Role

The Rental Operations Manager role, and the associated UX One pages and components, enable users to

- Receive alerts for rental contracts and related orders that require attention.
- Analyze data related to profitability, item utilization and business volumes.
- Easily access applications to take necessary actions on rental contracts and to manage rental items.

**Note:**

The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.

You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.

See *Understanding UX One Roles*.

## Prerequisites

Before using the Rental Operations Manager role (RNOPMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the RNOPMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Rental Operations Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Rental Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Rental Management.*

# Using the Rental Operations Manager UX One Role

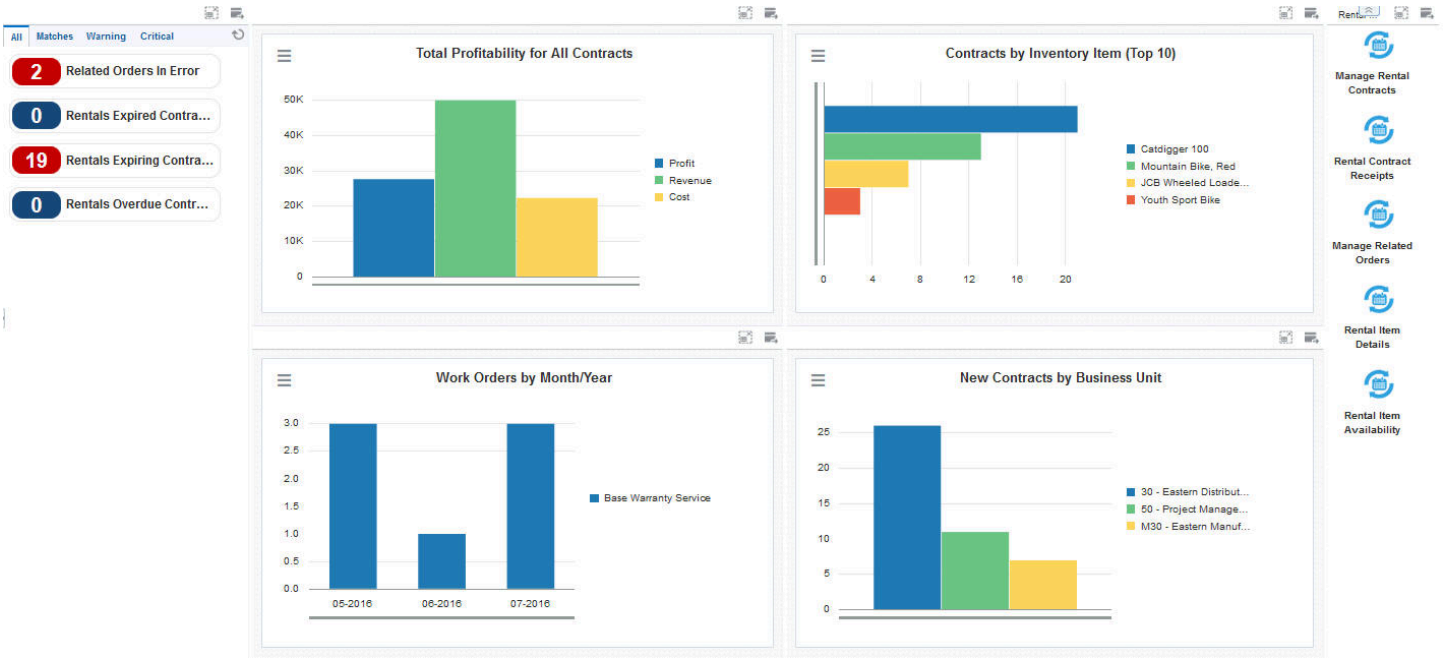
You use the Rental Operations Manager role to access the UX One Rental Operations Manager page (P54R001X/W54R001XA).

## UX One: Rental Operations Manager Page

You use the Rental Operations Manager page (P54R001X/W54R001XA) to view alerts and analyze data regarding rental contracts and items.

To access the UX One Rental Operations Manager page, log in to the EnterpriseOne system using the Rental Operations Manager role.

This graphic illustrates the Rental Operations Manager page:




**Watchlist Alerts**

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Rental Operations Manager page:

| Watchlist Alert | Description |
|---|---|
| Related Orders In Error | This alert tells users how many orders associated with your selection criteria are currently in error.<br><br>This alert is based on the Work With Rental Contract Related Orders program (P54R20).<br><br>When you click the alert, the form that the system displays is dependent upon the order type. If the related order is a work order, then Work Order Revisions will display. If the related order is a sales order, then Customer Service Inquiry/Sales Order Entry will display. If the related order is a purchase order, then Order Entry will display.<br><br>The following form layouts are available:<br><br>• Related Order Detail<br>The following grid formats are available:<br><br>• Simple |
| Rental Expired Contracts | This alert tells you how many contracts within a given time period have expired.<br><br>This alert is based on the Rental Contract Entry program (P54R10).<br><br>When you click the alert, the system displays the Work With Rental Contracts form. The following form layouts are available:<br><br>• Rental Contract Details<br>The following grid formats are available:<br><br>• Simple |
| Rental Expiring Contracts | This alert tells you how many contracts are going to expire soon.<br><br>This alert is based on the Rental Contract Entry program (P54R10).<br><br>When you click the alert, the system displays the Work With Rental Contracts form. The following form layouts are available:<br><br>• Rental Contract Details<br>The following grid formats are available:<br><br>• Simple |
| Rental Overdue Contracts | This alert tells you how many contracts are overdue.<br><br>This alert is based on the Rental Contract Entry program (P54R10).<br><br>When you click the alert, the system displays the Work With Rental Contracts form. The following form layouts are available:<br><br>• Rental Contract Details |

| Watchlist Alert | Description |
|---|---|
| | The following grid formats are available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Rental Management Implementation Guide*:

- *Generating Related Orders for Contracts.*
- *Entering Rental Contracts.*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Rental Operations Manager page:

| Component Title | Description |
|---|---|
| Total Profitability for All Contracts (P54R201X/W54R210XA) | Use this chart to view the total profit, revenue and costs for all contracts. This chart is based on the One View Rental Contract Profitability Inquiry program (P54R210). |
| Contracts by Inventory Item (Top 10) (P54R200X/W54R200XE) | Use this chart view the total number of contracts for each of the top 10 inventory items. This chart is based on the One View Rental Contract Inquiry program (P54R200). |
| Work Orders by Month/Year (P54R220X/W54R220XA) | Use this chart to view the number of work orders for all contracts by month and year. This chart is based on the One View Related Order Inquiry program (P54R220). |
| New Contracts by Business Unit (P54R200X/W54R200XA) | Use this chart to view the total number of new contracts for each business unit. This chart is based on the One View Rental Contract Inquiry program (P54R200). |

For additional information about the programs associated with these charts, see: *One View Reporting for Rental Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the available tasks on the Rental Operations Manager page:

| Task | Description |
|---|---|
| Manage Rental Contracts | Use the Manage Rental Contracts task to access the Rental Contract Entry program (P54R10).<br><br>When you click the task, the form that the system displays is dependent upon the order type. If the related order is a work order, then Work Order Revisions will display. If the related order is a sales order, |

| Task | Description |
|---|---|
| | then Customer Service Inquiry/Sales Order Entry will display. If the related order is a purchase order, then Order Entry will display.<br><br>The following form layouts are available:<br><br>• Rental Contract Details<br>The following grid formats are available:<br><br>• Simple |
| Rental Contract Receipts | Use this task to access the Rental Contract Receipts/Dispositions program (P54R12). When you click this task, the system takes you to the Rental Contract Receipts - Work With Rental Contract Receipts/ Dispositions form. |
| Manage Related Orders | Use this task to access the Work With Rental Contract Related Orders program (P54R20). When you click this task, the system takes you to the Manage Rental Contracts Related Orders - Work With Rental Contract Related Orders form.<br><br>The following form layouts are available:<br><br>• Related Order Details<br>The following grid formats are available:<br><br>• Simple |
| Rental Item Details | Use this task to access the Rental Item Details program (P54R41). When you click this task, the system takes you to the Rental Item Details - Work With Rental Item Details form.<br><br>The following form layouts are available:<br><br>• Rental Item Details<br>The following grid formats are available:<br><br>• Simple |
| Rental Item Availability | Use this task to access the Rental Item Availability program. |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Rental Management Implementation Guide*:

- *Generating Related Orders for Contracts*
- *Specifying an Inventory Item as a Rental Item*
- *Working With Receipt Routing for Rental Contracts*
- *Entering Rental Contracts*
- *Determining Rental Item Availability*

# 50 Rental Management Roles: Additional UX One Components for Rental Management

## Additional UX One Components for Rental Management

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own, or customizing existing UX One pages.

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

You can access these charts using Fast Path, by entering the program ID and form ID. For example, enter P1234X|W1234XA in the Fast Path field.

This table lists and describes the charts that are available for Rental Management:

| Component Title | Description |
|---|---|
| Expiring Contracts – By Customer (P54R200X/W54R200XB) | This chart displays the value of the contracts expiring soon by customer. This chart is based on the One View Rental Contract Inquiry program (P54R200). |
| Expired Contracts – By Customer (P54R200X/W54R200XC) | This chart displays the value of the expired contracts by customer. This chart is based on the One View Rental Contract Inquiry program (P54R200). |
| Profit by Contract – Top 5 (P54R210X/W54R210XB) | This chart displays profit, revenue, and cost values for the top 5 contracts. This chart is based on the One View Rental Contract Profitability Inquiry program (P54R210). |
| No. of New Contracts by Month/Year (P54R200X/W54R200XD) | This chart displays the number of new contracts for each business unit by month and year. This chart is based on the One View Rental Contract Inquiry program (P54R200). |

For additional information about the programs associated with these charts, see *One View Reporting for Rental Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# 51 Requisition Self-Service Roles: Requisition Manager (Release 9.2 Update)

## Understanding the Requisition Manager UX One Role

The Requisition Manager role, and the associated UX One pages and components, enable users to manage requisitions efficiently

You can use the Requisition Manager role to review requisitions and then approve or reject the requisitions. You can also analyze the requisitions and take important decisions. For example, if a requisition exceeds the budget, you can decide to either approve or reject the requisition.

The Requisition Manager pages enable you to receive important alerts, analyze data, and act on the information that you see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Requisition Manager role (REQMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the REQMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Requisition Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Requisition Self Service Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Requisition Self Service*.

# Using the Requisition Manager UX One Role

You use the Requisition Manager role to access these UX One pages:

- Requisition Manager Approval (P43E001X|W43E001XA)
- Requisition Manager Delegation (P43E001X|W43E001XB)

## UX One: Requisition Manager Approval Page

The Requisition Manager Approval page (P43E001X|W43E001XA) enables you to:

- Receive notification alerts for requisitions that you are assigned to.

  For example, you can view an alert for the number of open requisitions that are pending your approval.
- Analyze requisition data.

  For example, you can use the requisition data to understand the purchasing and spend policies of employees.
- Access programs to quickly act on the requisition information that is displayed on the page.

  You can review requisitions that you are assigned to and take action, if necessary. These include requisitions that are pending your approval, requisitions that exceed the budget, requisitions for high-priority items or special requests.

To access the UX One Requisition Manager Approval page, log in to the EnterpriseOne system using the Requisition Manager role.

This graphic illustrates the Requisition Manager Approval page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Requisition Manager Approval page:

| Watchlist Alert | Description |
|---|---|
| Open Approvals | This alert tells you how many requisitions are open and pending your approval. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the One View Requisition Self Service Inquiry program (P43267).<br><br>When you click the alert, the system displays the One View Requisition Self Service Inquiry form.<br><br>**Note:** Ensure that you set the following criterion in the query that you use for this watchlist alert:<br><br>• Resource [F98866] = <Your address book number> |
| Over Budget Requisitions | This alert tells you how many requisitions exceed the budget.<br><br>This alert is based on the Requisition Order Detail Inquiry program (P43E11C).<br><br>When you click the alert, the system displays the Requisition Order Detail Inquiry form.<br><br>The following grid format is available:<br><br>• Over Budget Requisitions |
| High Priority Requisitions | This alert tells you how many requisitions have been entered for high-priority items.<br><br>This alert is based on the Requisition Order Detail Inquiry program (P43E11C).<br><br>When you click the alert, the system displays the Requisition Order Detail Inquiry form.<br><br>The following grid format is available:<br><br>• High Priority Requisitions |
| Special Request Requisitions | This alerts tells you how many requisitions that are marked as special requests are pending approval.<br><br>This alert is based on the Requisition Order Detail Inquiry program (P43E11C).<br><br>When you click the alert, the system displays the Requisition Order Detail Inquiry form.<br><br>The following grid format is available:<br><br>• Special Request Requisitions |

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Requisition Manager Approval page:

| Component Title | Description |
|---|---|
| Requisitions Awaiting Approval (P43E82X\|W43E82XA) | Use this chart to view the requisitions that are pending your approval.<br><br>This chart is based on the Process Instance Left Outer Join - F98860, F98865, F98866 business view (V98860D).<br><br>**Note:** To view the requisitions awaiting your approval, the query for this chart must contain the following criteria: |

| Component Title | Description |
|---|---|
| | • Resource [F98866] = <Your address book number><br>• Instance Originator [F98860] != <Your address book number> |
| Over-Budget Requisitions (P43E15X\|W43E15XC) | Use this chart to view the requisitions that exceed the budget.<br>This chart is based on the Requisition Order Detail Inquiry program (P43E11C). |
| High-Priority Requisitions (P43E15X\|W43E15XB) | Use this chart to view the number of employee requisition orders entered for high-priority items.<br>This chart is based on the Requisition Order Detail Inquiry program (P43E11C). |
| Special Request Requisitions (P43E15X\|W43E15XA) | Use this chart to view the employee requisitions that are marked as special requests.<br>This chart is based on the Requisition Order Detail Inquiry program (P43E11C). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications Requisition Self Service Implementation Guide* :

- *Approving and Rejecting Requisitions*
- *Reviewing and Revising Requisitions*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Requisition Manager Approval page:

| Task | Description |
|---|---|
| Approve/Reject Requisitions | Use this task to access the Requisition Approval program (P43E82). |
| Review and Approve Over-Budget Requisitions | Use this task to access the Approve Requisitions Over Budget program (P43E070). |
| Review Requisitions | Use this task to access the Requisition Inquiry program (P43E15). |
| Review Approval Requisition Workflow | Use this task to access the Approval Authority program (P43E09A). |
| Requisition Manager Delegation | Use this task to access the Requisition Manager Delegation page (P43E001X\|W43E001XB). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Requisition Self Service Implementation Guide* :

- *Approving and Rejecting Requisitions*
- *Reviewing and Revising Requisitions*

- *Setting Up Approval Authority*

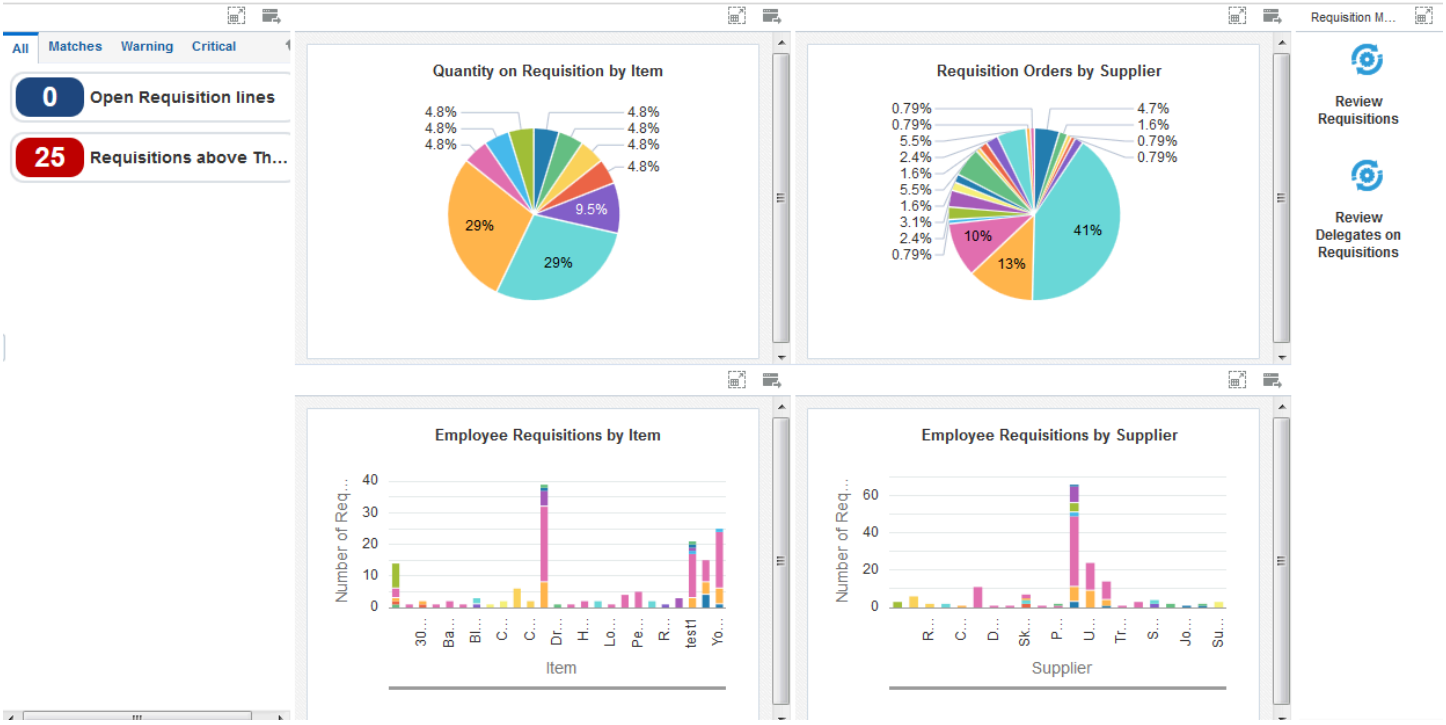
# UX One: Requisition Manager Delegation Page

You use the Requisition Manager Delegation page (P43E001X|W43E001XB) to:

- Receive notification alerts for requisitions that have been open for a period of time and requisitions that exceed the threshold amount.
- View information about the open requisition orders.
- Access applications to review requisitions and delegation records.

To access the UX One Requisition Manager Delegation page, log in to the EnterpriseOne system using the Requisition Manager role. When you log in with this role, the system automatically displays the Requisition Manager Approval page. Click the Requisition Manager Delegation task on the springboard to access the Requisition Manager Delegation page.

This graphic illustrates the Requisition Manager Delegation page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Requisition Manager Delegation page:

| Watchlist Alert | Description |
|---|---|
| Open Requisition Lines | This alert tells users how many requisitions are open for a period of time. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the One View Requisition Self Service Inquiry program (P43267).<br>When you click the alert, the system displays the One View Requisition Self Service Inquiry form. |
| Requisitions above Threshold Amount | This alert tells users how many requisitions exceed the threshold amount.<br>This alert is based on the One View Requisition Self Service Inquiry program (P43267).<br>When you click the alert, the system displays the One View Requisition Self Service Inquiry form. |

For additional information about the program associated with these watchlist alerts, see *One View Requisition Self Service Inquiry (P43267)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Requisition Manager Delegation page:

| Component Title | Description |
|---|---|
| Quantity on Requisition by Item (P43E11X\|W43E11XA) | Use this chart to view the percentage of the quantity on the requisition orders for different items.<br>This chart is based on the Requisition Detail - All Columns business view (V43E11A). |
| Requisition Orders by Supplier (P43267X\|W43267XA) | Use this chart to view the percentage of requisition orders that are open for different suppliers.<br>This chart is based on the One View Requisition Self Service Inquiry program (P43267). |
| Employee Requisitions by Item (P43267X\|W43267XB) | Use this chart to view the employee requisitions that were delegated by a requester for different items.<br>This chart is based on the One View Requisition Self Service Inquiry program (P43267). |
| Employee Requisitions by Supplier (P43267X\|W43267XC) | Use this chart to view the employee requisitions that were delegated by a requester for different suppliers.<br>This chart is based on the One View Requisition Self Service Inquiry program (P43267). |

For additional information about the programs associated with these charts, see *One View Requisition Self Service Inquiry (P43267)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Requisition Manager Delegation page:

| Task | Description |
| --- | --- |
| Review Requisitions | Use this task to access the Requisition Inquiry program (P43E15). |
| Review Delegates on Requisitions | Use this task to access the Requisition Delegation program (P43E280). |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Requisition Self Service Implementation Guide* :

- *Approving and Rejecting Requisitions*
- *Reviewing and Revising Requisitions*
- *Setting Up Approval Authority*

# 52 Sales Order Management Roles: Customer Service Manager

## Understanding the Customer Service Manager UX One Role

Customer Service Managers supervise Customer Service Representatives, who spend the majority of their time handling communications and queries from customers. The Customer Service Manager monitors orders and addresses any order entry issues. The Customer Service Manager assists the Customer Service Representative staff to update, cancel, release, and expedite orders. They also address returned material authorizations and analyze historical sales data to increase customer satisfaction scores and revenue.

The Customer Service Manager role, and the associated UX One pages and components, enable the manager to quickly determine whether orders require the manager's attention. For example, the Customer Service Manager can view how many backorders and held orders are pending, and then quickly access the JD Edwards EnterpriseOne forms that enable the manager to take action on the orders.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Customer Service Manager role (CSMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the CSMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Setup

Links on the UX One pages for the Customer Service Manager role enable you to navigate to the My Customers program (P42470). You must set up customer relationships before you can view your customers in the My Customers

program. See *Entering Sales Orders Using Order Guides (Release 9.2 Update)* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

## Prerequisite Reading

Before using the Customer Service Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in these topics:

- *Introduction to JD Edwards EnterpriseOne Sales Order Management* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*
- *Receiving and Sending Electronic Data Interchange Sales Order Documents* in the *JD Edwards EnterpriseOne Applications Data Interface for Electornic Data Interchange Implementation Guide*

# Using the Customer Service Manager UX One Role

You use the Customer Service Manager role to access these UX One pages:

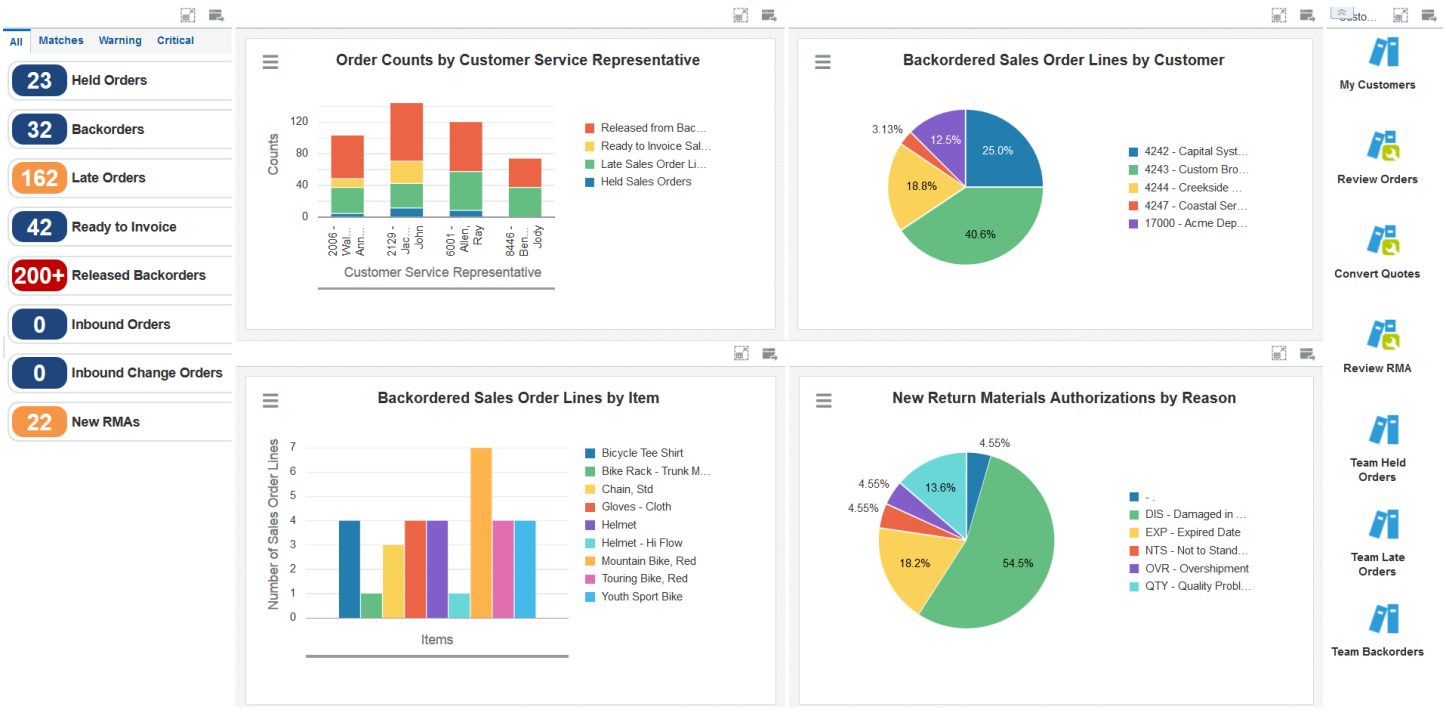
- Team Customers (P42001X/W42001XA)
- Team Held Orders (P42001X/W42001XB)
- Team Late Orders (P42001X/W42001XC)
- Team Backorders (P42001X/W42001XD)

## UX One: Team Customers Page

The Team Customers page (P42001X/W42001XA) enables you to view alerts for orders; view graphical representations of order counts, backorders, returned material authorizations (RMAs); and access additional UX One pages. You can use the links in the alerts and springboard to access additional information and access the forms that enable you to take action on orders.

To access the Team Customers page, log in to the EnterpriseOne system using the Customer Service Manager role.

This graphic illustrates the Team Customers page:




## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Team Customers page:

| Watchlist Alert | Description |
|---|---|
| Held Orders | This alert tells you how many orders are on hold. The system includes in the count all held orders for which the hold code is not blank and the value in the Sold To Customer field of the sales order is a customer for which you are responsible.<br><br>This alert is based on version ZJDE0007 of the Release Holds program (P43070).<br><br>When you click the alert, the system displays the Work With Held Orders form. The following form layout is available:<br><br>• Additional Information<br>The following grid format is available:<br><br>• Customer Held Orders |
| Backorders | This alert tells you how many sales order lines have backordered items.<br><br>This alert is based on the ZJDE0016 version of the Sales Order Entry program (P42101) and shows all order lines for which the backorder quantity is greater than 0 and the value in the Sold To Customer field of the sales order is a customer for which you are responsible.<br><br>When you click the alert, the system displays the Manage Existing Order form. The following form layout is available:<br><br>• Customer View<br>The following grid formats are available:<br><br>• Backorder by Item<br>• Backorders by Ship To |
| Late Orders | This alert tells you how many sales order lines have items that have not been shipped by the promised date.<br><br>This alert is based on version ZJDE00015 of the Sales Order Entry program (P42101) and includes all order lines for which the promised ship date is less than the current date, and the value in the Sold To Customer field of the sales order is a customer for which you are responsible.<br><br>When you click the alert, the system displays the Manage Existing Order form. The following form layout is available:<br><br>• Customer View<br>The following grid formats are available:<br><br>• Review Orders by Item<br>• Review Orders by Ship To |
| Ready to Invoice | This alert tells you how many orders are ready to have invoices generated (Next Status = 580).<br><br>This alert is based on version ZJDE0002 of the Status Code Update program (P42040).<br><br>When you click the alert, the system displays the Work With Sales Speed Status Update form. |

| Watchlist Alert | Description |
|---|---|
| Released Backorders | This alert tells you how many backorders have been released from backorder (Next Status = 540).<br>This alert is based on version ZJDE0003 of the Speed Status Update program (P42040).<br>When you click the alert, the system displays the Work With Sales Speed Status Update form. |
| Inbound Orders | This alert tells you how many inbound orders have not been successfully processed.<br>This alert is based on the Inbound EDI Order Inquiry program (P47010).<br>When you click the alert, the system displays the Work with Inbound EDI Orders form.<br>The following grid format is available:<br>• Inbound by Address Number |
| Inbound Changed Orders | This alert tells you how many inbound change orders have not been successfully processed.<br>This alert is based on the Status/Inquiry Revisions program (P47030).<br>When you click the alert, the system displays the Work with Inbound P.O. Change form.<br>The following grid format is available:<br>• Changed Inbound by Address Num |
| New RMA | This alert tells you how many new return material authorizations (RMAs) exist for your customers, based on the criteria that you set up in the watchlist.<br>This alert is based on the Work with Return Materials Authorization program (P40051).<br>When you click the alert, the system displays the Work with Return Material Authorization form. The following form layout is available:<br>• RMA Customer View<br>The following grid format is available:<br>• Review RMA |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders for Customer Service Representatives*
- *Processing Sales Orders*
- *Generating Returned Material Authorization*

Also see: *Receiving and Sending Electronic Data Interchange Sales Order Documents in the JD Edwards EnterpriseOne Applications Data Interface for Electornic Data Interchange Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different

query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Customers page:

| Component Title | Description |
|---|---|
| Order Counts by Customer Service Representative (P4211JGX/W4211JGXE) | Use this chart to view the number of late and held sales order lines, the number of order lines ready for invoicing, and the number of order lines ready for release from backorder, for each CSR.<br><br>This chart uses the V4211JG view, which is based on the following tables:<br><br>• Sales Order Detail (F4211)<br>• Item Branch (F4102)<br>• Customer Master by Line of Business (F03012)<br>• Customer Master Commission Information (F42140)<br>• Held Orders (F4209)<br><br>In addition to using a query for this chart, you must enter values for these fields in the menu:<br><br>• Customer Service Representative Role Type<br><br>The value that you enter must exist in UDC H42/RT.<br><br>• Ready to Invoice Status<br>• Released Backorder Status |
| Backordered Sales Order Lines by Item (P42101X/W42101XB) | Use this chart to view the number of backordered lines for each item. This chart is based on the Sales Order Entry program (P42101). |
| Backordered Sales Order Lines by Customer (P42101X/W42101XA) | Use this chart to view the percentage of backordered lines for each customer. This chart is based on the Sales Order Entry program (P42101). |
| New Return Materials Authorizations by Reason (P40051X/W40051XA) | Use this chart to view the percentage of return materials authorizations (RMAs) by reason. This chart is based on the Return Materials Authorization program (P40051).<br><br>In addition to using a query for this chart, you must enter a value for this field in the menu:<br><br>• Return Materials Authorizations within last (days) |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders for Customer Service Representatives*
- *Generating Returned Material Authorization*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Customers page:

| Task | Description |
|---|---|
| My Customers | Use this task to access the Customers Assigned to <your name> page of the My Customers program (P42470).<br><br>The following grid format is available:<br><br>• Simple<br>After you access the My Customers program while in the Customer Service Manager role, you can select from several form layouts that have been provided for the Select Items via Order Guides form. These form layouts are available:<br><br>• Customer Details<br>• Item Availability<br>• Item Details<br>• Item Image<br>• Price History |
| Review Orders | Use this task to access the Manage Existing Order form in the ZJDE0017 version of the Sales Order Entry program (P42101).<br><br>The following layout is available:<br><br>• Customer View<br>The following grid format is available:<br><br>• Revise Orders |
| Convert Quotes | Use this task to access the Manage Existing Order form in the ZJDE0018 version of the Sales Order Entry program (P42101).<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid format is available:<br><br>• Revise Quotes |
| Review RMA | Use this task to access the ZJDE0003 version of the Return Materials Authorization program (P40051).<br><br>The following form layout is available:<br><br>• RMA Customer View<br>The following grid format is available:<br><br>• Review RMA |
| Team Held Orders | Use this task to access the Team Held Orders page. The Team Held Orders page enables you to view held orders by customer service representative (CSR), by person responsible, by customer, and by hold code. |
| Team Late Orders | Use this task to access the Team Late Orders page. The Team Late Orders page enables you to view late orders by CSR, customer, and item. |

| Task | Description |
| --- | --- |
| Team Back Orders | Use this task to access the Team Backorders page. The page enables you to view backordered lines released by customer service representative (CSR), backordered lines by customer, and backordered lines by item. |

For additional information about the programs associated with these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders for Customer Service Representatives*
- *Processing Sales Orders*
- *Generating Returned Material Authorization*
- *Entering Sales Orders Using Order Guides (Release 9.2 Update)*

See also:

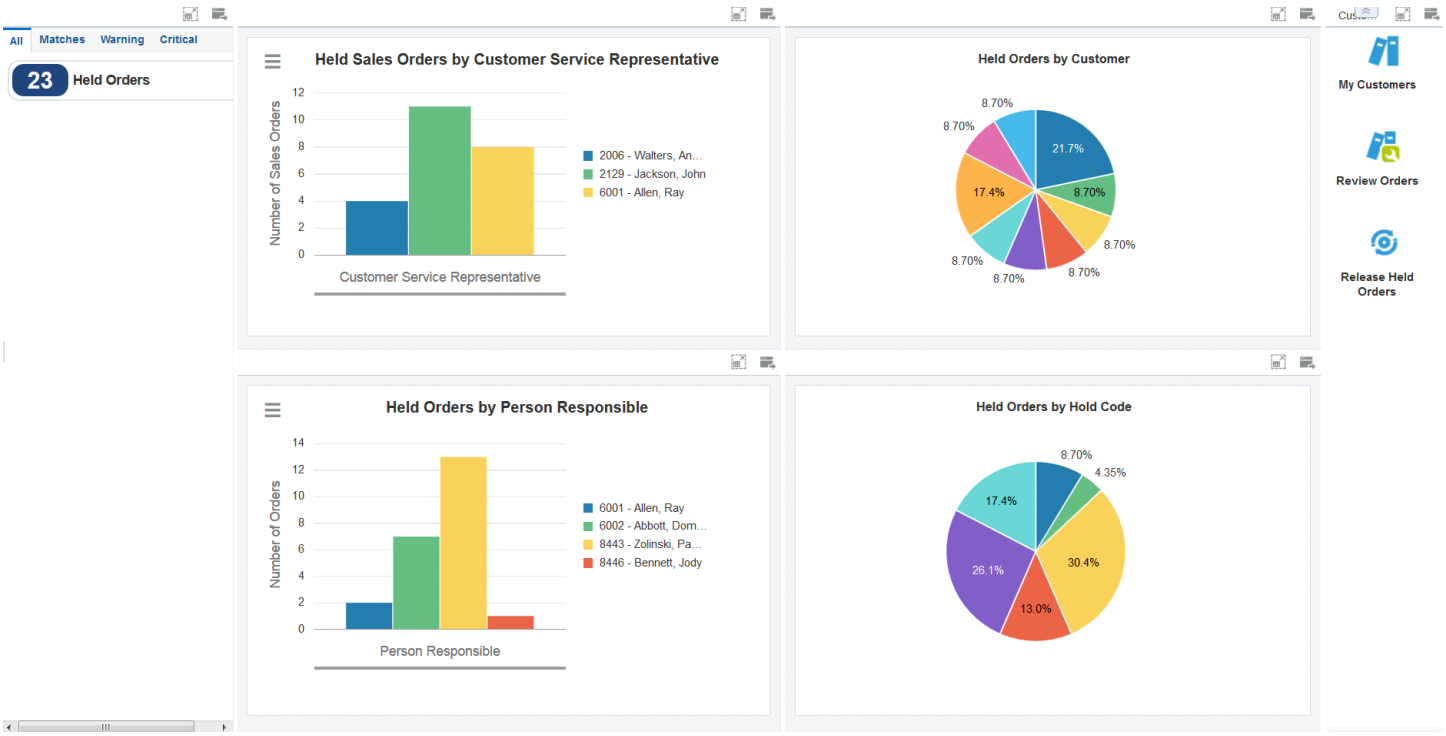
- *UX One: Team Held Orders Page*
- *UX One: Team Late Orders Page*
- *UX One: Team Backorders Page*

# UX One: Team Held Orders Page

Use the Team Held Orders page (P42001X/W42001XB) to view the held sales orders by CSR, person responsible, customer, and hold code. You can also use the tasks on the page to navigate to the My Customers program (P42470) and the Sales Order Entry program (P42101).

To access the Team Held Orders page, log in to the EnterpriseOne system using the Customer Service Manager role. When you log in with this role, the system automatically displays the Team Customers page. Click the Team Held Orders task on the springboard to access the Team Held Orders page.

This graphic illustrates the Team Held Orders page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alert that are available on the Team Held Orders page:

| Watchlist Alert | Description |
|---|---|
| Held Orders | This alert tells you how many orders are on hold. The system includes in the count all held orders for which the hold code is not blank and the value in the Sold To Customer field of the sales order is a customer for which you are responsible.<br><br>This alert is based on version ZJDE0007 of the Release Holds program (P43070).<br><br>When you click the alert, the system displays the Work With Held Orders form. The following form layout is available:<br><br>• Additional Information<br>The following grid format is available:<br><br>• Customer Held Orders |

For additional information about the program associated with this watchlist alert, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Held Orders page:

| Component Title | Description |
|---|---|
| Held Sales Orders by Customer Service Representative (P4211JGX/W4211JGXB) | Use this chart to view the number of held orders for each CSR. This chart is based on view V4211JG, which is based on the following tables:<br><br>• Sales Order Detail (F4211)<br>• Item Branch (F4102)<br>• Customer Master by Line of Business (F03012)<br>• Customer Master Commission Information (F42140)<br>• Held Orders (F4209)<br>In addition to using a query for this chart, you must enter a value for this field in the menu:<br><br>• Customer Service Representative Role Type<br><br>The value that you enter must exist in UDC H42/RT. |
| Held Orders By Person Responsible (P4209JAX/W4209JAXC) | Use this chart to view the number of held orders for each person responsible for the orders. This chart is based on the Sales Order Entry program (P42101). |

| Component Title | Description |
|---|---|
| Held Orders By Customer (P4209JAX/W4209JAXA) | Use this chart to view the percentage of held orders for each customer. This chart is based on view V4209JA, which is a join of the Held Orders table (F4209) and the Sales Order Header File (F4201). |
| Held Orders By Hold Code (P4209JAX/W4209JAXB) | Use this chart to view the percentage of held orders by hold code. This chart is based on view V4209JA, which is a join of the Held Orders table (F4209) and the Sales Order Header File (F4201). |

For additional information about the program associated with these charts, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Held Orders page:

| Task | Description |
|---|---|
| My Customers | Use this task to access the Customers Assigned to <your name> page of the My Customers program (P42470).<br><br>The following grid format is available:<br><br>• Simple<br>After you access the My Customers program while in the Customer Service Manager role, you can select from several form layouts that have been provided for the Select Items via Order Guides form. These form layouts are available:<br><br>• Customer Details<br>• Item Availability<br>• Item Details<br>• Item Image<br>• Price History |
| Review Orders | Use this task to access the Manage Existing Order form in the ZJDE0017 version of the Sales Order Entry program (P42101).<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid format is available:<br><br>• Revise Orders |
| Release Held Orders | Use this task to access the work With Held Orders form in version ZJDE0007 of the Release Holds program (P43070).<br><br>The following form layout is available:<br><br>• Additional Information<br>The following grid format is available: |

| Task | Description |
| --- | --- |
| | • Customer Held Orders |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

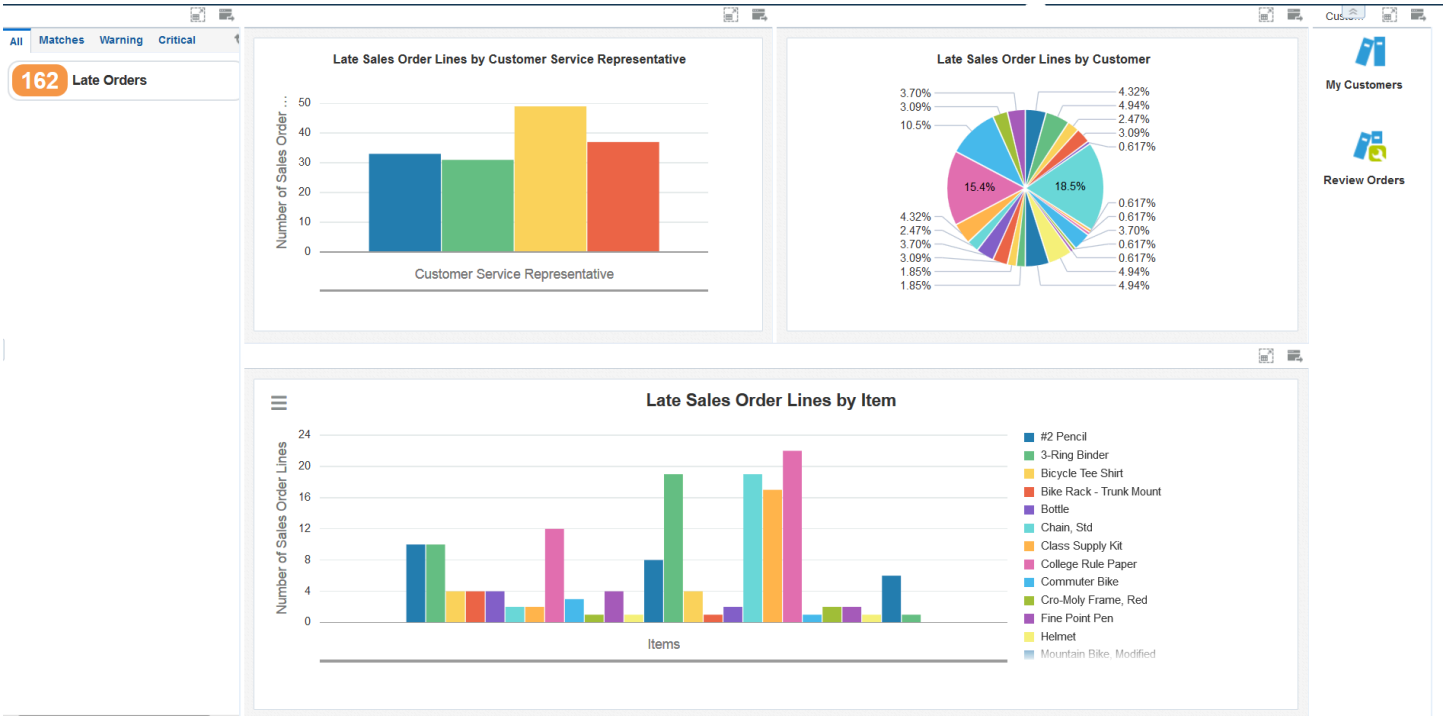
- *Entering Sales Orders Using Order Guides (Release 9.2 Update)*
- Holding, Reviewing, and Releasing Orders

# UX One: Team Late Orders Page

Use the Team Late Orders page (P42001X/W42001XC) to view the late sales order lines by CSR, customer, and item. You can also use the tasks on the page to navigate to the My Customers program (P42470) and version ZJDE0015 of the Sales Order Entry program (P42101).

To access the UX One Team Late Orders page, log in to the EnterpriseOne system using the Customer Service Manager role. When you log in with this role, the system automatically displays the Team Customers page. Click the Team Late Orders task on the springboard to access the Team Late Orders page.

This graphic illustrates the Team Late Orders page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alert that is available on the Team Late Orders:

| Watchlist Alert | Description |
|---|---|
| Late Orders | This alert tells you how many sales orders lines have not yet shipped when the line has a promised ship date that is prior to today's date.<br><br>This alert is based on version ZJDE0015 of the Sales Order Entry program (P42101).<br><br>When you click the alert, the system displays the Manage Existing Order form.<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid formats are available:<br><br>• Review Orders by Item<br>• Review Orders by Ship To |

For additional information about the program associated with this watchlist alert, see *Entering Sales Orders for Customer Service Representatives* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Late Orders page:

| Component Title | Description |
|---|---|
| Late Sales Order Lines By Customer Service Representative (P4211JGX/ W4211JGXA) | Use this chart to view the number of sales order lines that have not yet shipped when the line has a promised ship date that is prior to today's date. This chart shows the late sales order lines by CSR and is based on view V4211GJ, which is based on the following tables:<br><br>• Sales Order Detail (F4211)<br>• Item Branch (F4102)<br>• Customer Master by Line of Business (F03012)<br>• Customer Master Commission Information (F42140)<br>• Held Orders (F4209)<br>In addition to using a query for this chart, you must enter a value for this field in the menu:<br><br>• Customer Service Representative Role Type<br><br>The value that you enter must exist in UDC H42/RT. |

| Component Title | Description |
|---|---|
| Late Sales Order Lines By Customer (P42101X/W42101XD) | Use this chart to view the percentage of late sales order lines for each customer. This chart is based on the Sales Order Entry program (P42101). |
| Late Sales Order Lines By Item (P42101X/W42101XC) | Use this chart to view the number of late sales order lines by item. This chart is based on the Sales Order Entry program (P42101). |

For additional information about the programs associated with these charts, see *Entering Sales Orders for Customer Service Representatives* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Late Orders page:

| Task | Description |
|---|---|
| My Customers | Use this task to access the Customers Assigned to <your name> page of the My Customers program (P42470).<br><br>The following grid format is available:<br><br>• Simple<br>After you access the My Customers program while in the Customer Service Manager role, you can select from several form layouts that have been provided for the Select Items via Order Guides form. These form layouts are available:<br><br>• Customer Details<br>• Item Availability<br>• Item Details<br>• Item Image<br>• Price History |
| Review Orders | Use this task to access the Manage Existing Order form in the ZJDE0017 version of the Sales Order Entry program (P42101).<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid format is available:<br><br>• Revise Orders |

For additional information about the programs accessed by these tasks, see the following topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

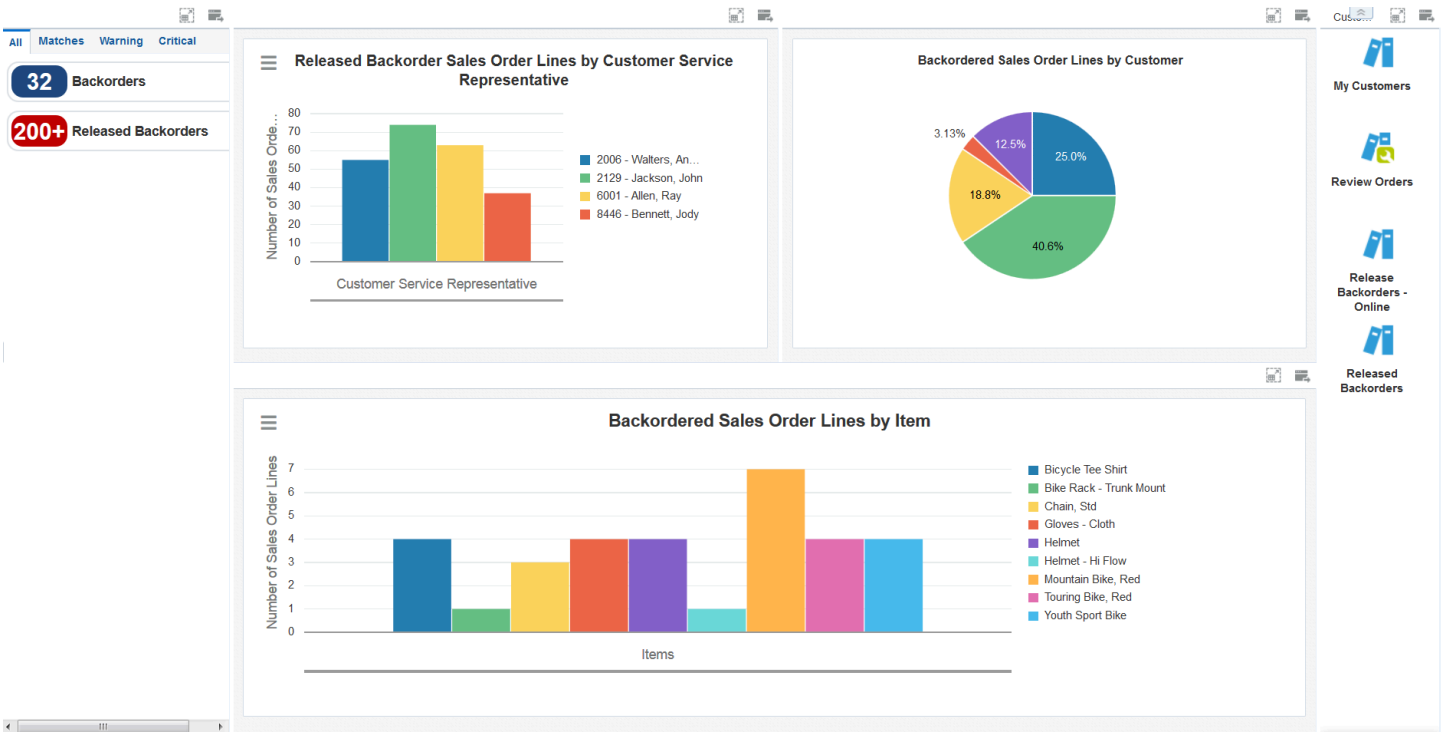
- *Entering Sales Orders Using Order Guides (Release 9.2 Update)*
- *Entering Sales Orders for Customer Service Representatives*

# UX One: Team Backorders Page

Use the Team Backorders page (P42001X/W42001XD) to view the backordered sales order lines by CSR, customer, and item. You can also use the tasks on the springboard to navigate to the My Customers program (P42470) and the programs that enable you to review, change the status of, and release backorders.

To access the UX One Team Backorders page, log in to the EnterpriseOne system using the Customer Service Manager role. When you log in with this role, the system automatically displays the Team Customers page. Click the Team Backorders task on the springboard to access the Team Backorders page.

This graphic illustrates the Team Backorders page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Team Backorders page:

| Watchlist Alert | Description |
|---|---|
| Backorders | This alert tells you how many sales order lines for each CSR have backordered items.<br><br>This alert is based on the ZJDE0016 version of the Sales Order Entry program (P42101) and shows all order lines for which the backorder quantify is greater than 0 and the value in the Sold To Customer field of the sales order is a customer for which you are responsible.<br><br>When you click the alert, the system displays the Manage Existing Order form. The following form layout is available:<br><br>• Customer View<br>The following grid formats are available:<br><br>• Backorders by Item<br>• Backorders by Ship To |
| Released Backorders | This alert tells you how many backordered sales order lines are ready to be released.<br><br>This alert is based on version ZJDE0002 of the Speed Status program (P42040).<br><br>In addition to using a query for this chart, you must enter values for these fields in the menu:<br><br>• Customer Service Representative Role Type<br>• Release Backorder Status<br>When you click the alert, the system displays the Work With Sales Speed Status Update form. |

For additional information about the program associated with these watchlist alerts, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Backorders page:

| Component Title | Description |
|---|---|
| Released Backorder Sales Order Lines by Customer Service Representative (P4211JGX/W4211JGXD) | Use this chart to view the number of released backordered sales order lines by CSR.<br><br>This chart is based on view V4211JG, which is based on the following tables:<br><br>• Sales Order Detail (F4211)<br>• Item Branch (F4102)<br>• Customer Master by Line of Business (F03012) |

| Component Title | Description |
|---|---|
| | • Customer Master Commission Information (F42140)<br>• Held Orders (F4209)<br>In addition to using a query for this chart, you must enter a value for these fields in the menu:<br>• Customer Service Representative Role Type<br>The value that you enter must exist in UDC H42/RT.<br>• Released Backorder Status |
| Backordered Sales Order Lines By Customer (P42101X/P42101XA) | Use this chart to view the percentage of backordered sales order lines associated with each customer. This chart is based on the Sales Order Entry program (P42101). |
| Backordered Sales Order Lines By Item (P42101X/P42101XB) | Use this chart to view the number of backordered sales order lines by item. This chart is based on the Sales Order Entry program (P42101). |

For additional information about the program associated with these charts, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Backorders page:

| Task | Description |
|---|---|
| My Customers | Use this task to access the Customers Assigned to <your name> page of the My Customers program (P42470).<br>The following grid format is available:<br>• Simple<br>After you access the My Customers program while in the Customer Service Manager role, you can select from several form layouts that have been provided for the Select Items via Order Guides form. These form layouts are available:<br>• Customer Details<br>• Item Availability<br>• Item Details<br>• Item Image<br>• Price History |
| Review Orders | Use this task to access the Manage Existing Order form in the ZJDE0016 version of the Sales Order Entry program (P42101).<br>The following grid formats are available:<br>• Backorders by Item<br>• Backorders by Ship To |

| Task | Description |
| --- | --- |
| Release Backorders - Online | Use this task to access the Work With Backorders form in the Release Backorders - Online program (P42117). |
| Released Backorders | Use this task to access the Work With Sales Speed Status Update form in the Status Code Update program (P42040). |

For additional information about the programs accessed by these tasks, see the following topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*
- *Processing Sales Orders*
- *Entering Sales Orders Using Order Guides (Release 9.2 Update)*

# 53 Sales Order Management Roles: Customer Service Representative

## Understanding the Customer Service Representative UX One Role

The Customer Service Representative (CSR) is responsible for working directly with customers who need to order products. This includes creating new orders, updating existing orders, and creating order returns. CSRs are often assigned to specific customers and serve as the central point of contact for their customers.

The Customer Service Representative role, and the associated UX One pages and components, enable users to receive important alerts about orders, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Customer Service Representative role (JDECSR), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the JDECSR role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Setup

Links on the UX One pages for the Customer Service Representative role enable you to navigate to the My Customers program (P42470). You must set up customer relationships before you can view your customers in the My Customers program. See *Entering Sales Orders Using Order Guides (Release 9.2 Update)* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

## Prerequisite Reading

Before using the Customer Service Representative role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Sales Order Management.*

# Using the Customer Service Representative UX One Role

You use the Customer Service Representative role to access these UX One pages:

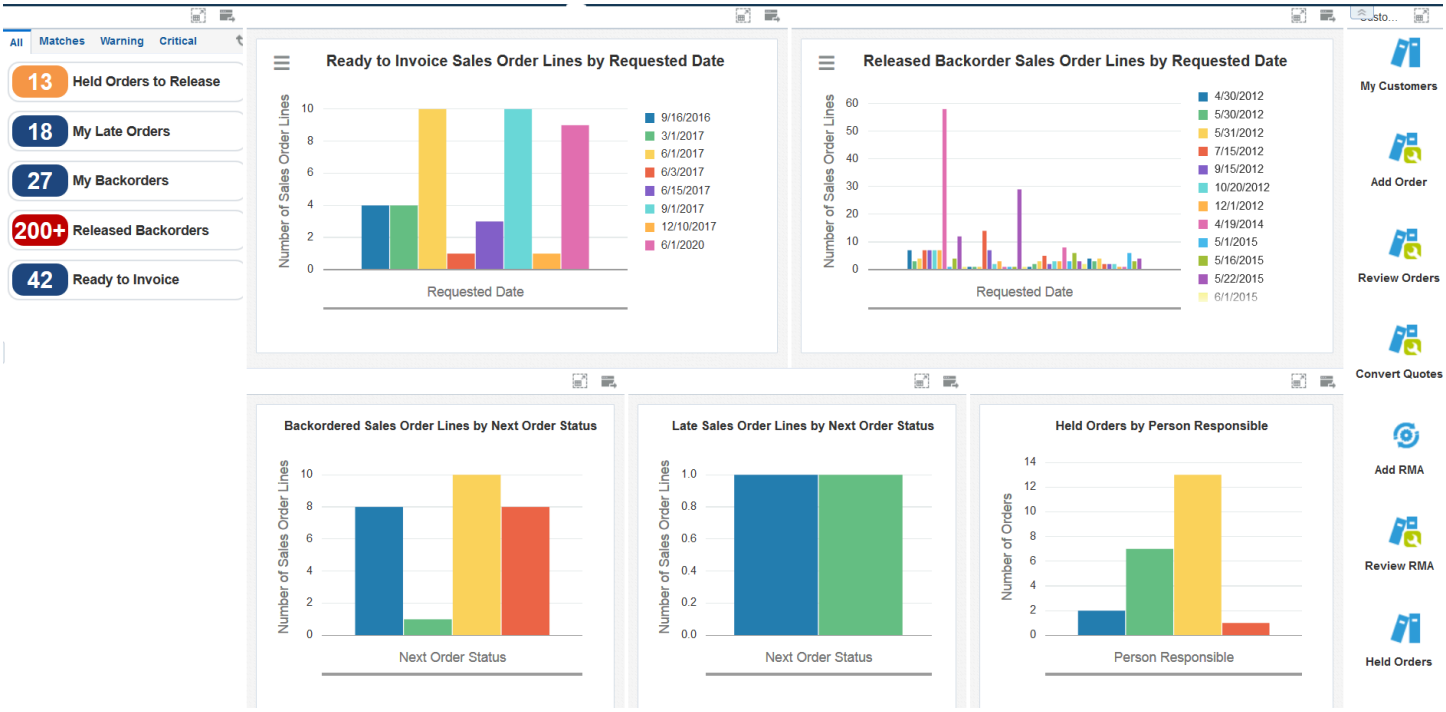
- My Customers (P42002X/W42002XA)
- Held Orders (P42002X/W42002XB)
- Late Orders (P42002X/W42002XC)
- Backorders (P42002X/W42002XD)

## UX One: My Customers Page

The My Customers page (P42002X/W42002XA) enables you to view alerts for orders; view graphical representations of order counts by date, released backorders by date, backorders and late order by next order status, and held orders by person responsible; and access the programs that you need to use to work with your sales orders. You can also access additional UX One pages for the Customer Service Representative role.

To access the UX One My Customers page, log in to the EnterpriseOne system using the Customer Service Representative role.

This graphic illustrates the My Customers UX One page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the My Customers page:

| Watchlist Alert | Description |
|---|---|
| Held Orders to Release | This alert tells users how many held orders are ready to be released.<br><br>This alert is based on the ZJDE0008 version of the Release Holds program (P43070). When you click the alert, the system displays the Work With Held Orders form.<br><br>The following form layout is available:<br><br>• Additional Information<br>The following grid format is available:<br><br>• CSR Held Orders |
| My Late Orders | This alert tells the user how many orders were not shipped by the promised ship date.<br><br>This alert is based on the ZJDE0015 version of the Sales Order Entry program (P42101). When you click the alert, the system displays the Manage Existing Orders form.<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid formats are available:<br><br>• Review Orders by Item<br>• Review Orders by Ship To |
| My Backorders | This alert tells the user how many sales order lines are backordered.<br><br>This alert is based on the ZJDE0016 version of the Sales Order Entry program (P42101).<br><br>When you click the alert, the system displays the Manage Existing Orders form.<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid formats are available:<br><br>• Backorders by Item<br>• Backorders by Ship To |
| Released Backorders | This alert tells you how many backorders have been released from backorder (Next Status = 540).<br><br>This alert is based on version ZJDE0003 of the Status Code Update program (P42040). When you click the alert, the system displays the Work With Sales Speed Status Update form. |
| Ready to Invoice | This alert tells you how many orders are ready to have invoices generated (Next Status = 580).<br><br>This alert is based on version ZJDE0002 of the Status Code Update program (P42040). When you click the alert, the system displays the Work With Sales Speed Status Update form. |

For additional information about the programs associated with these watchlist alerts, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders for Customer Service Representatives*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the My Customers page:

| Component Title | Description |
|---|---|
| Ready to Invoice Sales Order Lines by Requested Date (P42040X/W42040XA) | Use this chart to view the number of sales order lines that are ready to be invoiced by the requested date of the sales order lines.<br><br>This chart is based on the Sales Order Speed State Update program (P42040).<br><br>In addition to using a query for this chart, you must enter a value for this field in the menu:<br><br>• Ready to Invoice Status |
| Released Backorder Sales Order Lines by Requested Date (P42040X/W42040XB) | Use this chart to view the number of backordered sales order lines by the requested date of the sales order line.<br><br>This chart is based on the Sales Order Speed State Update program (P42040).<br><br>In addition to using a query for this chart, you must enter a value for this field in the menu:<br><br>• Released Backorder Status |
| Backordered Sales Order Lines by Next Order Status (P42101X/W42101XE) | Use this chart to view the number of backordered sales order lines by the next order status.<br><br>This chart is based on the Sales Order Entry program (P42101). |
| Late Sales Order Lines by Next Order Status (P42101X/W42101XF) | Use this chart to view the number of late sales order lines by the next order status.<br><br>This chart is based on the Sales Order Entry program (P42101). |
| Held Orders by Person Responsible (P4209JAX/W4209JAXC) | Use this chart to view the number of held orders by person responsible.<br><br>This chart is based on data in the Held Orders table ((F4209) and the Sales Order Header File (F4201). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders for Customer Service Representatives*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the My Customers page:

| Task | Description |
|---|---|
| My Customers | Use this task to access the Customers Assigned To <your name> form on the My Customers program (P43470).<br><br>The following grid format is available:<br><br>• Simple<br>After you access the My Customers program while in the Customer Service Manager role, you can select from several form layouts that have been provided for the Select Items via Order Guides form. These form layouts are available:<br><br>• Customer Details<br>• Item Availability<br>• Item Details<br>• Item Image<br>• Price History |
| Add Order | Use this task to access the Enter New Order form in the ZJDE0017 version of the Sales Order Entry program (P42101). |
| Review Orders | Use this task to access the Manage Existing Order form in the ZJDE0017 version of the Sales Order Entry program (P42101).<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid format is available:<br><br>• Revise Orders |
| Convert Quotes | Use this task to access the Manage Existing Order form in the ZJDE0018 version of the Sales Order Entry program (P42101).<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid format is available:<br><br>• Revise Quotes |
| Add RMA | Use this task to access the Returned Material Authorization Revisions form in the Return Material Authorization Revisions program (P400511). |
| Review RMA | Use this task to access the Work With Returned Material Authorization form in the Work with Return Material Authorization Program (P40051).<br><br>The following form layout is available: |

| Task | Description |
|---|---|
| | • RMA Customer View<br>The following grid format is available:<br>• Review RMA |
| Held Orders | Use this task to access the Held Orders page. The Held Orders page enables you to view held orders by person responsible, by customer, and by hold code. |
| Late Orders | Use this task to access the Late Orders page. The page enables you to view late sales order lines by next order status, customer, and item. |
| Backorders | Use this task to access the Backorders page. The page enables you to view backordered sales order lines by customer, item, requested date, and next order status. |

For additional information about the programs associated with these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders for Customer Service Representatives*
- *Processing Sales Orders*
- *Entering Sales Orders Using Order Guides (Release 9.2 Update)*
- *Generating Returned Material Authorization*

# UX One: Held Orders Page

The Held Orders page (P42002X/W42002XB) enables you to view an alert for held orders that are ready to release; view graphical representations of order counts or percentages of held orders by person responsible, customer, and hold code; and access the programs that you need to use to work with your sales orders.

To access the UX One Held Orders page, log in to the EnterpriseOne system using the Customer Service Representative role. When you log in with this role, the system automatically displays the My Customers page. Click the Held Orders task on the springboard to access the Held Orders page.

This graphic illustrates the Held Orders UX One page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alert that is available on the Held Orders page:

| Watchlist Alert | Description |
|---|---|
| Held Orders to Release | This alert tells users how many held orders are ready to be released.<br><br>This alert is based on the ZJDE0008 version of the Release Holds program (P43070).<br><br>When you click the alert, the system displays the Work With Held Orders form. The following form layout is available:<br><br>• Additional Information<br>The following grid format is available:<br><br>• CSR Held Orders |

For additional information about the programs associated with this watchlist alert, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Held Orders page:

| Component Title | Description |
|---|---|
| Held Orders by Person Responsible P4209JAX/W4209JAXC) | Use this chart to view the number of held orders by person responsible.<br><br>This chart is based on view V4209VJ, which is a join of the Held Orders table (F4209) and the Sales Order Header File (F4201). |
| Held Orders by Customer (P4209JAX/ W4209JAXA) | Use this chart to view the percentage of held orders by customer.<br><br>This chart is based on view V4209VJ, which is a join of the Held Orders table (F4209) and the Sales Order Header File (F4201). |
| Held Orders by Hold Code (P4209JAX/ W4209JAXB) | Use this chart to view the percentage of held orders by hold code.<br><br>This chart is based on view V4209VJ, which is a join of the Held Orders table (F4209) and the Sales Order Header File (F4201). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders for Customer Service Representatives*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Held Orders page:

| Tasks | Description |
|---|---|
| My Customers | Use this task to access the Customers Assigned To <your name> form on the My Customers program (P43470).<br>The following grid format is available:<br>• Simple<br>After you access the My Customers program while in the Customer Service Manager role, you can select from several form layouts that have been provided for the Select Items via Order Guides form. These form layouts are available:<br>• Customer Details<br>• Item Availability<br>• Item Details<br>• Item Image<br>• Price History |
| Review Orders | Use this task to access the Manage Existing Order form in the ZJDE0017 version of the Sales Order Entry program (P42101).<br>The following form layout is available:<br>• Customer View<br>The following grid format is available:<br>• Revise Orders |
| Release Held Orders | Use this task to access the Work With Held Orders form in version ZJDE0007 of the Release Holds program (P43070).<br>The following form layout is available:<br>• Additional Information<br>The following grid format is available:<br>• Customer Held Orders |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

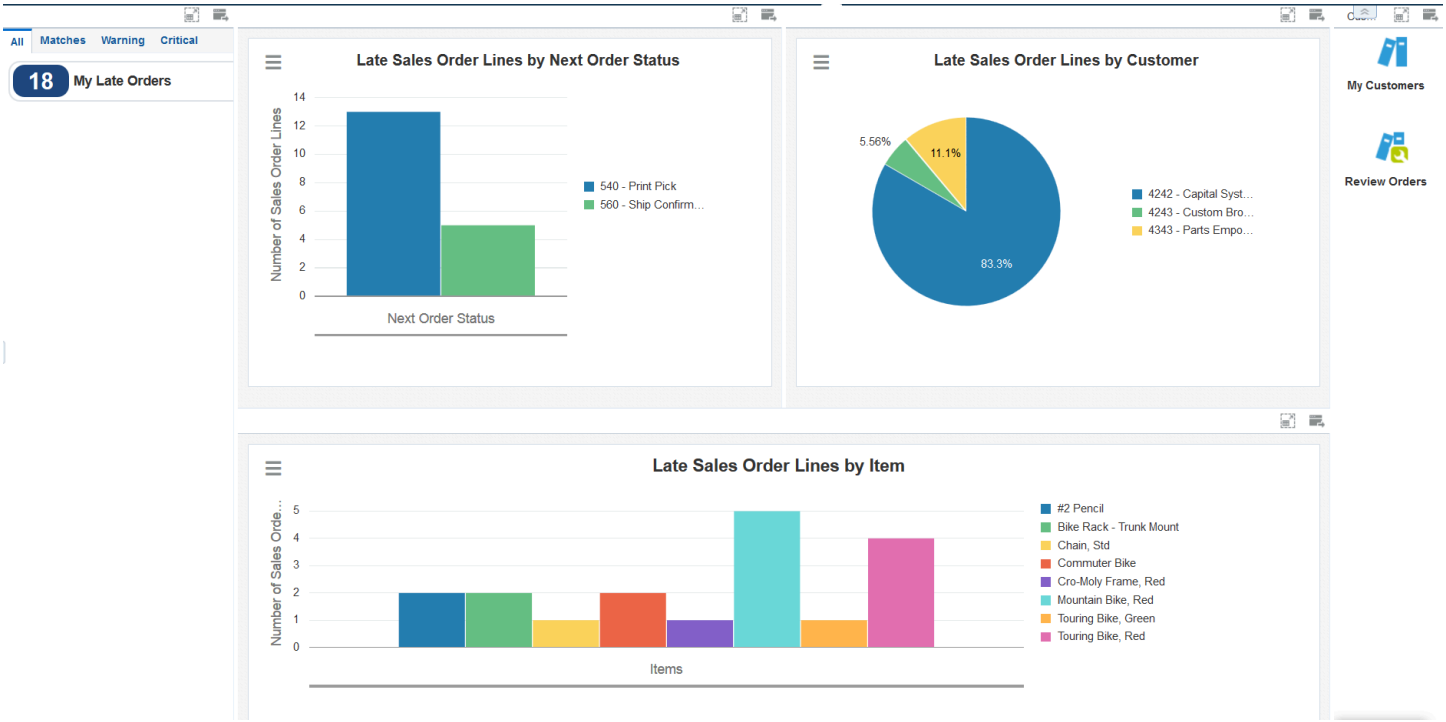
- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders Using Order Guides (Release 9.2 Update)*

# UX One: Late Orders Page

Use the Late Orders page (P42002X/W42002XC) to view the late sales order lines by next order status, customers, and items. You can also use the tasks on the springboard to navigate to the My Customers program (P43470) and the ZJDE0015 version of the Sales Order Entry program (P42101).

To access the UX One Late Orders page, log in to the EnterpriseOne system using the Customer Service Representative role. When you log in with this role, the system automatically displays the My Customers page. Click the Late Orders task on the springboard to access the Late Orders page.

This graphic illustrates the Late Orders page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alert that is available on the Late Orders page:

| Watchlist Alert | Description |
|---|---|
| My Late Orders | This alert tells users how many lines on sales orders were not shipped by the promised date.<br><br>This alert is based on the ZJDE0015 version of the Sales Order Entry program (P42101). When you click the alert, the system displays the Manage Existing Orders form.<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid formats are available:<br><br>• Review Orders by Item<br>• Review Orders by Ship To |

For additional information about the programs associated with this watchlist alert, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Late Orders page:

| Component Title | Description |
|---|---|
| Late Sales Order Lines by Next Order Status (P42101X/W42101XF) | Use this chart to view the number of held orders by person responsible.<br><br>This chart is based on the Sales Order Entry program (P42101). |
| Late Sales Order Line by Customer (P42101X/W42101XD) | Use this chart to view the number of held orders by customer.<br><br>This chart is based on the Sales Order Entry program (P42101). |
| Late Sales Order Lines by Item (P42101X/W42101XC) | Use this chart to view the number of held orders by person responsible.<br><br>This chart is based on the Sales Order Entry program (P42101). |

For additional information about the programs associated with this watchlists, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Late Orders page:

| Task | Description |
|---|---|
| My Customers | Use this task to access the Customers Assigned to <your name> page of the My Customers program (P42470).<br><br>The following grid format is available:<br><br>• Simple<br><br>After you access the My Customers program while in the Customer Service Representative role, you can select from several form layouts that have been provided for the Select Items via Order Guides form. These form layouts are available:<br><br>• Customer Details<br>• Item Availability<br>• Item Details<br>• Item Image<br>• Price History |
| Review Orders | Use this task to access the Manage Existing Order form in the ZJDE0015 version of the Sales Order Entry program (P42101).<br><br>The following grid formats are available:<br><br>• Review Orders by Item<br>• Review Orders by Ship To |

For additional information about the programs accessed by these tasks, see the following topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

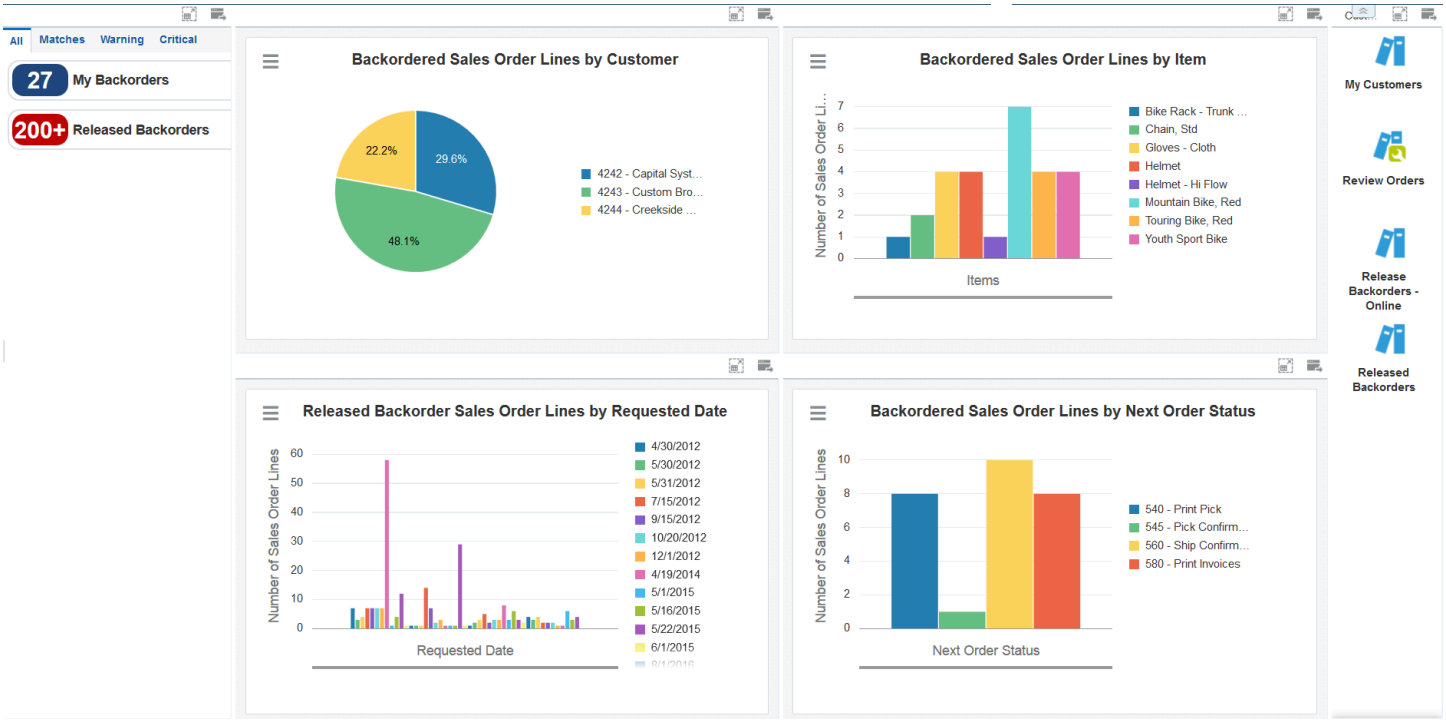
- *Holding, Reviewing, and Releasing Orders*
- *Processing Sales Orders*
- *Entering Sales Orders Using Order Guides (Release 9.2 Update)*

# UX One: Backorders Page

Use the Backorders page (P42002X/W42002XD) to view the backordered sales order lines by customers, items, next order status, and requested date. You can also use the tasks on the springboard to navigate to the My Customers program (P43470) and the applications that you need to work with backordered items.

To access the UX One Backorders page, log in to the EnterpriseOne system using the Customer Service Representative role. When you log in with this role, the system automatically displays the My Customers page. Click the Backorders task on the springboard to access the Backorders page.

This graphic illustrates the Backorders page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Backorders page:

| Watchlist Alert | Description |
|---|---|
| My Backorders | This alert tells users how many sales order lines are backordered.<br><br>This alert is based on the ZJDE0016 version of the Sales Order Entry program (P42101). When you click the alert, the system displays the Manage Existing Orders form.<br><br>The following form layout is available:<br><br>• Customer View<br>The following grid formats are available:<br><br>• Backorders by Item<br>• Backorders by Ship To |
| Released Backorders | This alert tells you how many backordered sales order lines are ready to be released.<br><br>This alert is based on version ZJDE0003 of the Speed Status program (P42040).<br><br>When you click the alert, the system displays the Work With Sales Speed Status Update form. |

For additional information about the programs associated with this watchlist alert, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Backorders page:

| Component Title | Description |
|---|---|
| Backordered Sales Order Lines by Customer (P42101X/W42101XA) | Use this chart to view the percentage of backordered sales order lines by customer.<br><br>This chart is based on the Sales Order Entry program (P42101). |
| Backordered Sales Order Lines By Item (P42101X/W42101XB) | Use this chart to view the number of backordered sales order lines by item. This chart is based on the Sales Order Entry program (P42101). |
| Released Backorder Sales Order Lines by Requested Date (P42040X/W42040XB) | Use this chart to view the number of backordered sales order lines by requested date. This chart is based on the Status Code Update program (P42040).<br><br>In addition to using a query for this chart, you must enter a value for this field in the menu:<br><br>• Released Backorder Status |

| Component Title | Description |
|---|---|
| Backordered Sales Order Lines by Next Order Status (P42101X/ W42101XE) | Use this chart to view the number of backordered lines by the next order status.<br><br>This chart is based on the Sales Order Entry program (P42101). |

For additional information about the program associated with these charts, see *Holding, Reviewing, and Releasing Orders* in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Backorders page:

| Task | Description |
|---|---|
| My Customers | Use this task to access the Customers Assigned to <your name> page of the My Customers program (P42470).<br><br>The following grid format is available:<br><br>• Simple<br>After you access the My Customers program while in the Customer Service Representative role, you can select from several form layouts that have been provided for the Select Items via Order Guides form. These form layouts are available:<br><br>• Customer Details<br>• Item Availability<br>• Item Details<br>• Item Image<br>• Price History |
| Review Orders | Use this task to access the Manage Existing Order form in the ZJDE0016 version of the Sales Order Entry program (P42101).<br><br>The following grid formats are available:<br><br>• Backorders by Item<br>• Backorders by Ship To |
| Release Backorders - Online | Use this task to access the Work With Backorders form in the Release Backorders - Online program (P42117). |
| Released Backorders | Use this task to access the Work With Backorders form in the Release Backorders - Online program (P42117). |

For additional information about the programs accessed by these tasks, see the following topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*:

- *Holding, Reviewing, and Releasing Orders*

- *Processing Sales Orders*
- *Entering Sales Orders Using Order Guides (Release 9.2 Update)*

# 54 Sales Order Management Roles: Additional UX One Components for Sales Order Management

## Additional UX One Components for Sales Order Management

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own, or customizing existing UX One pages

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

You can access these charts using Fast Path by entering the program ID and form ID. For example, enter P1234X|W1234XA.

This table lists and describes the additional UX One components that are available for the Customer Service Manager role:

| Component | Description |
|---|---|
| Team Held Orders by Customer (P42140AX/W42140AXA) | Use this chart to view the percentage of held orders for each customer. This chart is based on view V42140JA, which is a join of the Held Orders table (F4209) and the Sales Order Header File (F4201). |
| Team Held Orders by Hold Code (P42140AX/W42140AXB) | Use this chart to view the percentage of held orders by hold code. This chart is based on view V42140JA, which is a join of the Held Orders table (F4209) and the Sales Order Header File (F4201). |
| Team Held Orders by Person Responsible (P42140AX/W42140AXC) | Use this chart to view the number of held orders by person responsible. This chart is based on view V42140JA, which is a join of the Held Orders table (F4209) and the Sales Order Header File (F4201). |
| Team Late Orders by Item (P42140EX/W42140EXA) | Use this chart to view by item the number of sales order lines for which the item is not shipped by the promised date.<br><br>This chart is based on view V42140JE, which is based on these tables:<br><br>• Sales Order Detail (F4211)<br>• Item Branch (F4102)<br>• Customer Master Commission Information (F42140)<br>• Customer Master by Line of Business (F03012) |

| Component | Description |
|---|---|
| Team Late Orders by Customer (P42140EX/W42140EXB | Use this chart to view the percentage of sales order lines by customer for which the item is not shipped by the promised date.<br><br>This chart is based on view V42140JE, which is based on these tables:<br><br>• Sales Order Detail (F4211)<br>• Item Branch (F4102)<br>• Customer Master Commission Information (F42140)<br>• Customer Master by Line of Business (F03012) |
| Team Backorders by Item (P42140EX/W42140EXC) | Use this chart to view the number of backordered sales order lines for each item.<br><br>This chart is based on view V42140JE, which is based on these tables:<br><br>• Sales Order Detail (F4211)<br>• Item Branch (F4102)<br>• Customer Master Commission Information (F42140)<br>• Customer Master by Line of Business (F03012) |
| Team Backorders by Customer (P42140EX/W41140EXD) | Use this chart to view the percentage of backordered sales order lines that are associated with each customer.<br><br>This chart is based on view V42140JE, which is based on these tables:<br><br>• Sales Order Detail (F4211)<br>• Item Branch (F4102)<br>• Customer Master Commission Information (F42140)<br>• Customer Master by Line of Business (F03012) |

For additional information about the program associated with these charts, see the following topics in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide* :

- *Holding, Reviewing, and Releasing Orders*
- *Entering Sales Orders for Customer Service Representatives*

# 55 Service Management Roles: Field Service Manager

## Understanding the Field Service Manager UX One Role

The Field Service Manager role, and the associated UX One pages and components, enable users to receive important alerts, analyze data, and act on the information they see. The pages provide alerts regarding overdue work orders and preventive maintenance records, and also alert users when there are outstanding service alerts.

Additionally, users can view charts to help them analyze cost, schedule, performance and workload data for their service team. Lastly, the pages provide field service managers with easy access to the programs that they need to act on the information they see on the pages.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Field Service Manager role (FSVCMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the FSVCMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Field Service Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Service Management.*

# Using the Field Service Manager UX One Role

You use the Field Service Manager role to access these UX One pages:

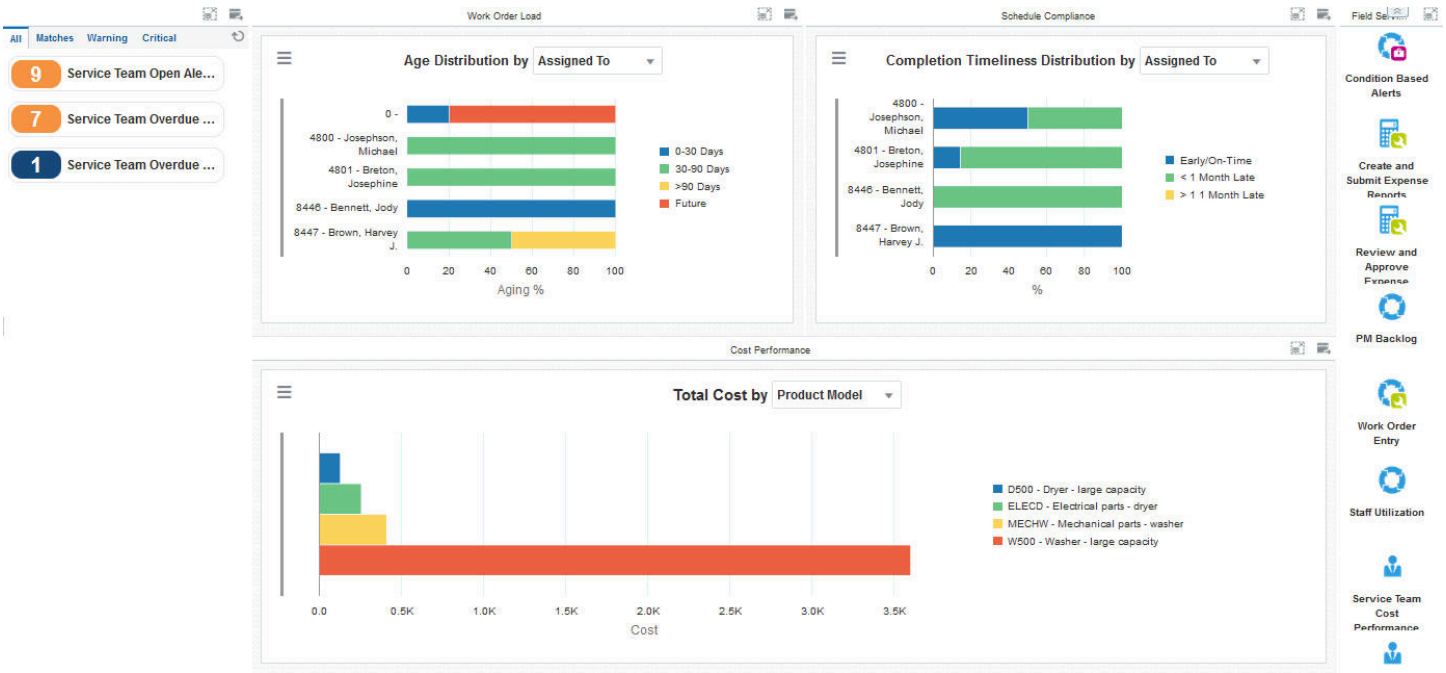
- Field Service Manager (P17006X/W17006XA)
- Service Team Work Order Load (P17006X/W17006XB)
- Service Team Schedule (P17006X/W17006XC)
- Service Team Cost Performance (P17006X/W17006XD)

## UX One: Field Service Manager

The Field Service Manager page (P17006X/W17006XA) enables users to receive important alerts regarding overdue work orders and preventive maintenance records, and outstanding service alerts. Additionally, the page provides high-level analytical information about aging, performance and cost associated with the service team. Lastly, the page provides field service managers with easy access to frequently used programs, and additional UX One pages.

To access the UX One Field Service Manager page, log in to the EnterpriseOne system using the Field Service Manager role.

This graphic illustrates the Field Service Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Field Service Manager page:

| Watchlist Alert | Description |
|---|---|
| Service Team Open Alerts | This alert tells users how many service alerts are currently open for their team.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310, version ZJDE0001).<br><br>When you click the alert, the system displays the Work With Condition-Based Alerts form. The following grid formats are available:<br><br>• Basic |

| Watchlist Alert | Description |
|---|---|
| Service Team Overdue WOs | This alert tells users how many service work orders are currently overdue for their team.<br>This alert is based on the Scheduling Workbench program (P48201, version ZJDE0002).<br>When you click the alert, the system displays the Work With Work Orders form. The following form layouts are available:<br>• Service WOs<br>The following grid formats are available:<br>• Simple |
| Service Team Overdue PMs | This alert tells users how many preventive maintenance records are currently overdue for their team.<br>This alert is based on the Preventive Maintenance Backlog Program (P12071, version ZJDE0003).<br>When you click the alert, the system displays the PM Backlog form. The following grid formats are available:<br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Managing Work Orders* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Field Service Manager page:

| Component Title | Description |
|---|---|
| Age Distribution by (P13560X/W13560XB) | Use this chart to view work order aging statistics for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Business Unit<br>• Supervisor<br>• WO Type |

| Component Title | Description |
|---|---|
| Completion Timeliness Distribution by (P13560X/W13560XA) | Use this chart to view work order completion statistics for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Contract<br>• Customer<br>• Lead Craft<br>• Product Family<br>• Product Model<br>• Site<br>• Supervisor |
| Total Cost by (P13560X/W13560XG) | Use this chart to view work order total cost for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Contract<br>• Customer<br>• Product Family<br>• Product Model<br>• Site |

For additional information about the programs associated with these charts, see *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Field Service Manager page:

| Task | Description |
|---|---|
| Condition Based Alerts | Use this task to access the Condition-Based Alerts Workbench program (P1310).<br><br>The following grid formats are available:<br><br>• Basic |
| Create and Submit Expense Reports | Use this task to access the Expense Report Entry program (P09E2011, version ZJDE0002). |

| Task | Description |
|---|---|
| Review and Approve Expense Reports | Use this task to access the Expense Report Entry program (P09E2011, ZJDE0003). |
| PM Backlog | Use this task to access the Preventive Maintenance Backlog program (P12071, version ZJDE0003).<br>The following grid formats are available:<br>• Basic |
| Work Order Entry | Use this task to access the Work Order Entry program (P48201)<br>The following form layouts are available:<br>• Service WOs<br>The following grid formats are available:<br>• Simple |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |
| Service Team Cost Performance | Use this task to access the UX One Service Team Cost Performance page. |
| Service Work Team Order Load | Use this task to access the UX One Service Team Work Order Load page. |
| Service Team Schedule | Use this task to access the UX One Service Team Schedule page. |

For additional information about the programs accessed by these tasks, see:

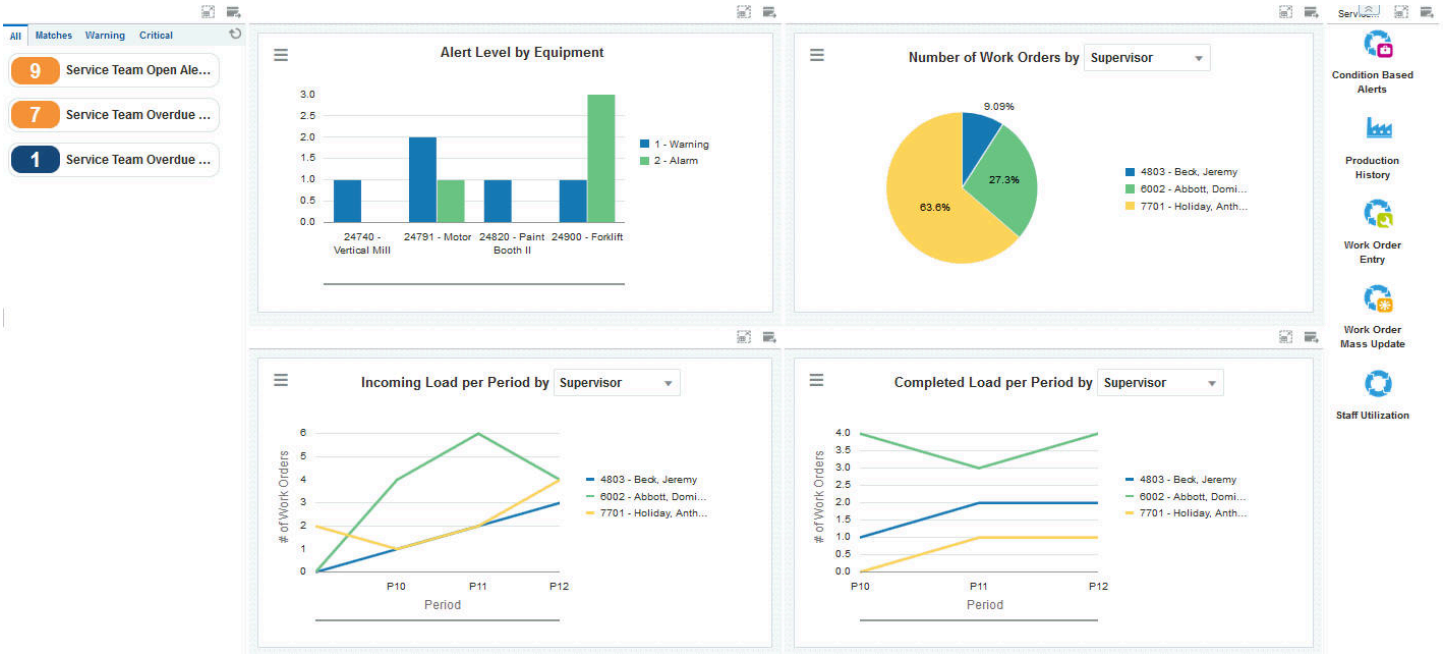
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Entering Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Creating Work Orders Using the Work Order Entry Programs (P48201/P17714)* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# UX One: Service Team Work Order Load Page

The Service Team Work Order Load page (P17006X/W17006XB) enables users to receive alerts regarding overdue work orders, service alerts, and preventive maintenance records. It also enables users to view analytical data about the planned, incoming, and completed work order load for their team. Users can then access programs that enable them to act on the information they see on the page.

To access the UX One Service Team Work Order Load page, log in to the EnterpriseOne system using the Field Service Manager role. When you log in with this role, the system automatically displays the Field Service Manager page. Click the Service Team Work Order Load task on the springboard to access the Service Team Work Order Load page.

This graphic illustrates the Service Team Work Order Load page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Service Team Work Order Load page:

| Watchlist Alert | Description |
|---|---|
| Service Team Open Alerts | This alert tells users how many service alerts are currently open for their team.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310, version ZJDE0001). |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the Work With Condition-Based Alerts form. The following grid formats are available:<br>• Basic |
| Service Team Overdue WOs | This alert tells users how many service work orders are currently overdue for their team.<br>This alert is based on the Scheduling Workbench program (P48201, version ZJDE0002).<br>When you click the alert, the system displays the Work With Work Orders form. The following form layouts are available:<br>• Service WOs<br>The following grid formats are available:<br>• Simple |
| Service Team Overdue PMs | This alert tells users how many preventive maintenance records are currently overdue for their team.<br>This alert is based on the Preventive Maintenance Backlog Program (P12071, version ZJDE0003).<br>When you click the alert, the system displays the PM Backlog form. The following grid formats are available:<br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Managing Work Orders* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Team Work Order Load page:

| Component Title | Description |
|---|---|
| Alert Level (P1310X/W1310XA) | Use this chart to view the alert level for each piece of equipment.<br>This chart is based on the Condition-Based Alerts Workbench program (P1310). |
| Number of Work Orders by (P13560X/W13560XJ) | Use this chart to view work order assignments for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560). |

| Component Title | Description |
|---|---|
| | Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Customer<br>• Equipment<br>• Site<br>• Supervisor<br>• WO Type |
| Incoming Load Per Period by (P13560X/ W13560XC) | Use this chart to view the incoming work order load for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Contract<br>• Customer<br>• Site<br>• Supervisor |
| Completed Load per Period by (P13560X/ W13560XE) | Use this chart to view completed work order load statistics for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |

For additional information about the programs associated with these charts, see:

- *One View Work Order Analysis (P13560)*in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Service Team Work Order Load page:

| Task | Description |
|---|---|
| Condition Based Alert Workbench | Use this task to access the Condition-Based Alerts Workbench program (P1310). |

| Task | Description |
|---|---|
| | The following grid formats are available:<br>• Basic |
| Production History | Use this task to access the Production History program (P31227).<br>The following grid formats are available:<br>• Basic |
| Work Order Entry | Use this task to access the Work Order Entry program (P48201)<br>The following form layouts are available:<br>• Service WOs<br>The following grid formats are available:<br>• Simple |
| Work Order Mass Update | Use this task to access the search for Work Orders program (P48022). |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |

For additional information about the programs accessed by these tasks, see:

- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Creating Work Orders Using the Work Order Entry Programs (P48201/P17714)* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*
- *Using the Work Order Mass Update Process* in the *JD Edwards EnterpriseOne Applications Work Orders Implementation Guide*

# UX One: Service Team Schedule Page

The Service Team Schedule page (P17006X/W17006XC) enables users to receive alerts regarding overdue work orders and preventive maintenance records. The page also displays several graphs that enable the field service supervisor to accurately schedule upcoming work for their team. The page also provides access to programs and pages that enable users to quickly act on the information provided on the page.

To access the UX One Service Team Schedule page, log in to the EnterpriseOne system using the Field Service Manager role. When you log in with this role, the system automatically displays the Field Service Manager page. Click the Service Team Schedule task on the springboard to access the Service Team Schedule page.

This graphic illustrates the Service Team Schedule page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Service Team Schedule page:

| Watchlist Alert | Description |
|---|---|
| Service Team Overdue WOs | This alert tells users how many service work orders are currently overdue for their team.<br><br>This alert is based on the Scheduling Workbench program (P48201, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Work Orders form. The following form layouts are available:<br><br>• Service WOs<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Service Team Overdue PMs | This alert tells users how many preventive maintenance records are currently overdue for their team.<br><br>This alert is based on the Preventive Maintenance Backlog Program (P12071, version ZJDE0003).<br><br>When you click the alert, the system displays the PM Backlog form. The following grid formats are available:<br><br>• Basic |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Managing Work Orders* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Team Schedule page:

| Component Title | Description |
|---|---|
| Average Hours Variance/WO by (P13560X/W13560XO) | Use this chart to view the average actual hours variance by work order for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Contract<br>• Customer<br>• Product Family<br>• Product Model<br>• Site |
| Completion Timeliness Distribution by (P13560X/W13560XA) | Use this chart to view work order completion statistics for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To |

| Component Title | Description |
|---|---|
| | • Contract<br>• Customer<br>• Lead Craft<br>• Product Family<br>• Product Model<br>• Site<br>• Supervisor |
| Number of Overdue PMs by (P13570X/W13570XA) | Use this chart to view the number of overdue preventive maintenance records for your team.<br>This chart is based on the One View PM Analysis program (P13570).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Customer<br>• Service Type<br>• Site |
| Average PM Fulfillment by Service Type (P13570X/W13570XC) | Use this chart to view average preventive maintenance fulfillment statistics for a specific time period for your team.<br>This chart is based on the One View PM Analysis program (P13570).<br>You can use the Begin Date and End Date fields on the top of the chart to specify a specific date range. |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Work Order Analysis (P13560)*
- *One View PM Analysis (P13570)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the My Service Schedule page:

| Task | Description |
|---|---|
| Work Assignments | Use this task to access the Crew Schedule Assignments program (P48330). |
| PM Backlog | Use this task to access the Preventive Maintenance Backlog program (P12071, version ZJDE0003).<br>The following grid formats are available:<br>• Basic |

| Task | Description |
|---|---|
| Work Order Entry | Use this task to access the Work Order Entry program (P48201)<br>The following form layouts are available:<br>• Service WOs<br>The following grid formats are available:<br>• Simple |
| Staff Utilization | Use this task to access the Staff Utilization Chart program. |

For additional information about the programs accessed by these tasks, see:

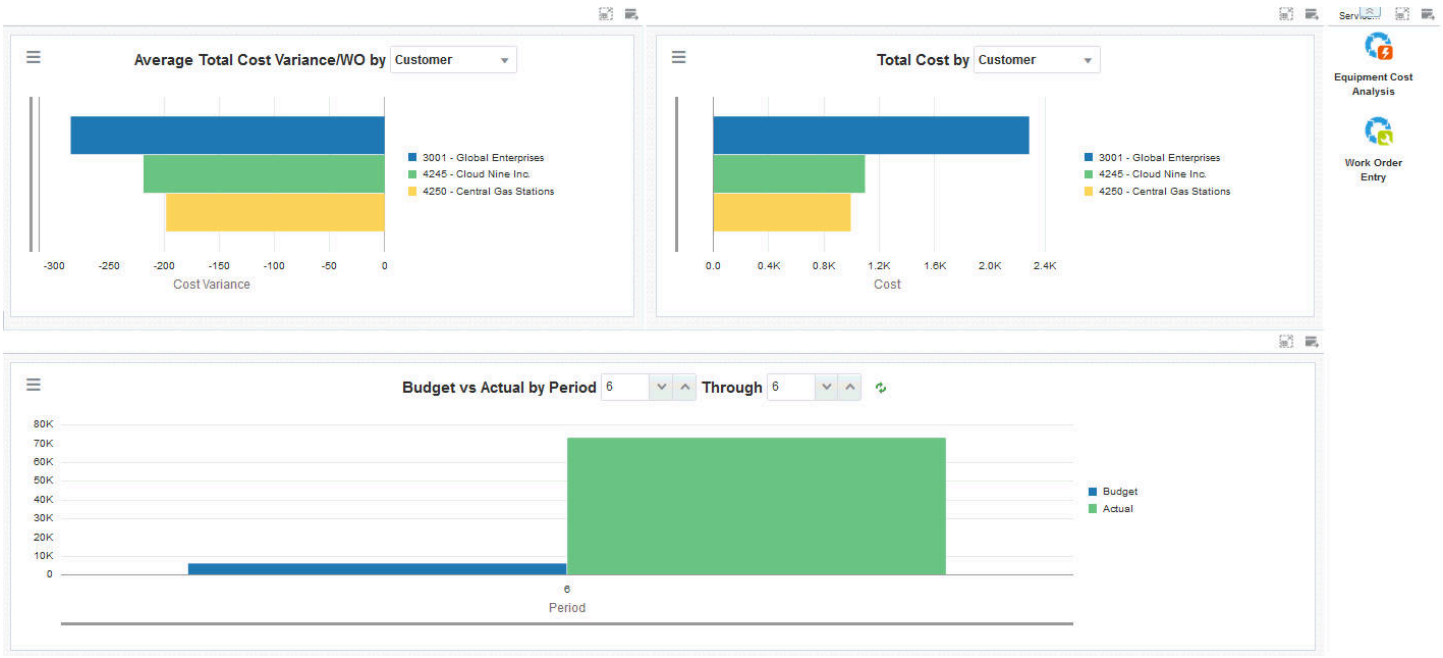
- *Managing Crew Scheduling* in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Creating Work Orders Using the Work Order Entry Programs (P48201/P17714)* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# UX One: Service Team Cost Performance Page

The Service Team Cost Performance page (P17006X/W17006XD) enables users to view analytical cost information about work orders and contracts, and to compare actual cost to the budgeted cost. The page also enables users to easily access programs that enable them to act on the cost information they see.

To access the UX One Service Team Cost Performance page, log in to the EnterpriseOne system using the Field Service Manager role. When you log in with this role, the system automatically displays the Field Service Manager page. Click the Service Team Cost Performance task on the springboard to access the Service Team Cost Performance page.

This graphic illustrates the Service Team Cost Performance page:




## Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Team Cost Performance page:

| Component Title | Description |
|---|---|
| Average Hours Variance/WO by (P13560X/W13560XO) | Use this chart to view the average actual hours variance by work order for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Contract |

| Component Title | Description |
|---|---|
| | • Customer<br>• Product Family<br>• Product Model<br>• Site |
| Total Cost by (P13560X/W13560XG) | Use this chart to view work order total cost by contract for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Contract<br>• Customer<br>• Product Family<br>• Product Model<br>• Site |
| Budget vs Actual by Period (P09217X/ W09217XB) | Use this chart to view budget amounts versus actual amounts by period for your team.<br>This chart is based on the One View Account Balance Inquiry program (P09217, version ZJDE0002). You can use the fields at the top of the chart to specify which periods to include in the chart. |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Work Order Analysis (P13560)*
- *One View Account Balance Inquiry (P09217)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Service Team Cost Performance page:

| Task | Description |
|---|---|
| Equipment Cost Analysis | Use this task to access the Equipment Cost Analysis program (P13801).<br>The following form layouts are available:<br>• Equipment Cost Detail<br>The following grid formats are available:<br>• Simple |
| Work Order Entry | Use this task to access the Work Order Entry program (P48201)<br>The following form layouts are available: |

| Task | Description |
| --- | --- |
| | • Service WOs<br>The following grid formats are available:<br>• Simple |

For additional information about the programs accessed by these tasks, see:

- *Setting Up Equipment Cost Analysis* in the *JD Edwards EnterpriseOne Applications Equipment Cost Analysis Implementation Guide*
- *Creating Work Orders Using the Work Order Entry Programs (P48201/P17714)* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

# 56 Service Management Roles: Field Service Supervisor

## Understanding the Field Service Supervisor UX One Role

The Field Service Supervisor role, and the associated UX One pages and components, enable users to receive alerts, analyze team statistics, and access programs and pages that enable them to perform their job duties.

The Field Service Supervisor pages alert users when there are overdue work orders, preventive maintenance records, or service alerts. The pages also provide graphical representations of work order load, cost, and completion information. Using the tasks on these pages, users can quickly access programs to act on the alerts and analytical data provided to them.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Field Service Supervisor role (FSVCSUPJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the FSVCSUPJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Field Service Supervisor role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Service Management.*

# Using the Field Service Supervisor UX One Role

You use the Field Service Supervisor role to access these UX One pages:

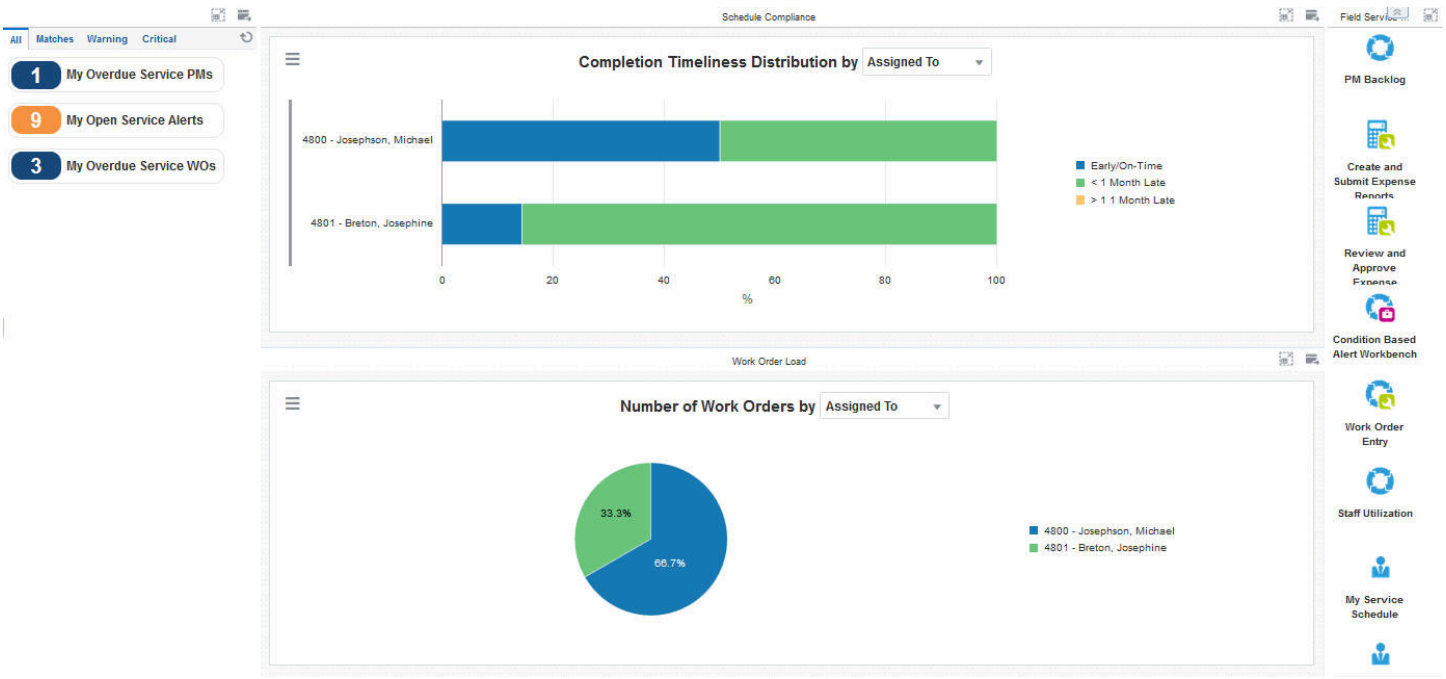
- Field Service Supervisor (P17005X/W17005XA)
- My Service Schedule (P17005X/W17005XB)
- My Service Work Order Load (P17005X/W17005XC)

## UX One: Field Service Supervisor Page

The Field Service Supervisor page (P17005X/W17005XA) enables users to receive alerts about overdue service alerts, preventive maintenance records, and work orders, view statistical information about the number of work orders assigned to the team, and how quickly they are completing the work orders, and enables them to quickly access programs and pages that they frequently use to complete their job duties.

To access the UX One Field Service Supervisor page, log in to the EnterpriseOne system using the Field Service Supervisor role.

This graphic illustrates the Field Service Supervisor page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Field Service Supervisor page:

| Watchlist Alert | Description |
|---|---|
| My Overdue Service PMs | This alert tells users how many of their preventive maintenance records are currently overdue.<br><br>This alert is based on the Preventive Maintenance Backlog Program (P12071, version ZJDE0003).<br><br>When you click the alert, the system displays the PM Backlog form. The following grid formats are available:<br><br>• Basic |

| Watchlist Alert | Description |
|---|---|
| My Open Service Alerts | This alert tells users how many service alerts are currently open.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310, version ZJDE0001).<br><br>When you click the alert, the system displays the Work With Condition-Based Alerts form. The following grid formats are available:<br><br>• Basic |
| My Overdue Service WOs | This alert tells users how many service work orders are currently overdue.<br><br>This alert is based on the Scheduling Workbench program (P48201, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Work Orders form. The following form layouts are available:<br><br>• Service WOs<br>The following grid formats are available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*
- *Managing Work Orders* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Field Service Supervisor page:

| Component Title | Description |
|---|---|
| Completion Timeliness Distribution by (P13560X/W13560XM) | Use this chart to view work order completion statistics for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Contract<br>• Customer<br>• Lead Craft |

| Component Title | Description |
|---|---|
| | • Product Family<br>• Product Model<br>• Site<br>• Supervisor |
| Number of Work Orders by (P13560X/ W13560XS) | Use this chart to view work order assignments for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Customer<br>• Equipment<br>• Site<br>• Supervisor<br>• WO Type |

For additional information about the programs associated with these charts, see *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Field Service Supervisor page:

| Task | Description |
|---|---|
| PM Backlog | Use this task to access the Preventive Maintenance Backlog program (P12071, ZJDE0003).<br>The following grid formats are available:<br>• Basic |
| Create and Submit Expense Reports | Use this task to access the Expense Report Entry program (P09E2011, ZJDE0002). |
| Review and Approve Expense Reports | Use this task to access the Expense Report Entry program (P09E2011, ZJDE0003). |
| Condition Based Alert Workbench | Use this task to access the Condition-Based Alerts Workbench program (P1310, ZJDE0001).<br>The following grid formats are available:<br>• Basic |
| Work Order Entry | Use this task to access the Work Order Entry program (P48201, version ZJDE0002)<br>The following form layouts are available: |

| Task | Description |
|---|---|
| | • Service WOs<br>The following grid formats are available:<br>• Simple |
| Staff Utilization | Use this task to access the Staff Utilization Chart program |
| My Service Schedule | Use this task to access the UX One My Service Schedule page. |
| My Service Work Order Load | Use this task to access the UX One My Service Work Order Load page. |

For additional information about the programs accessed by these tasks, see:

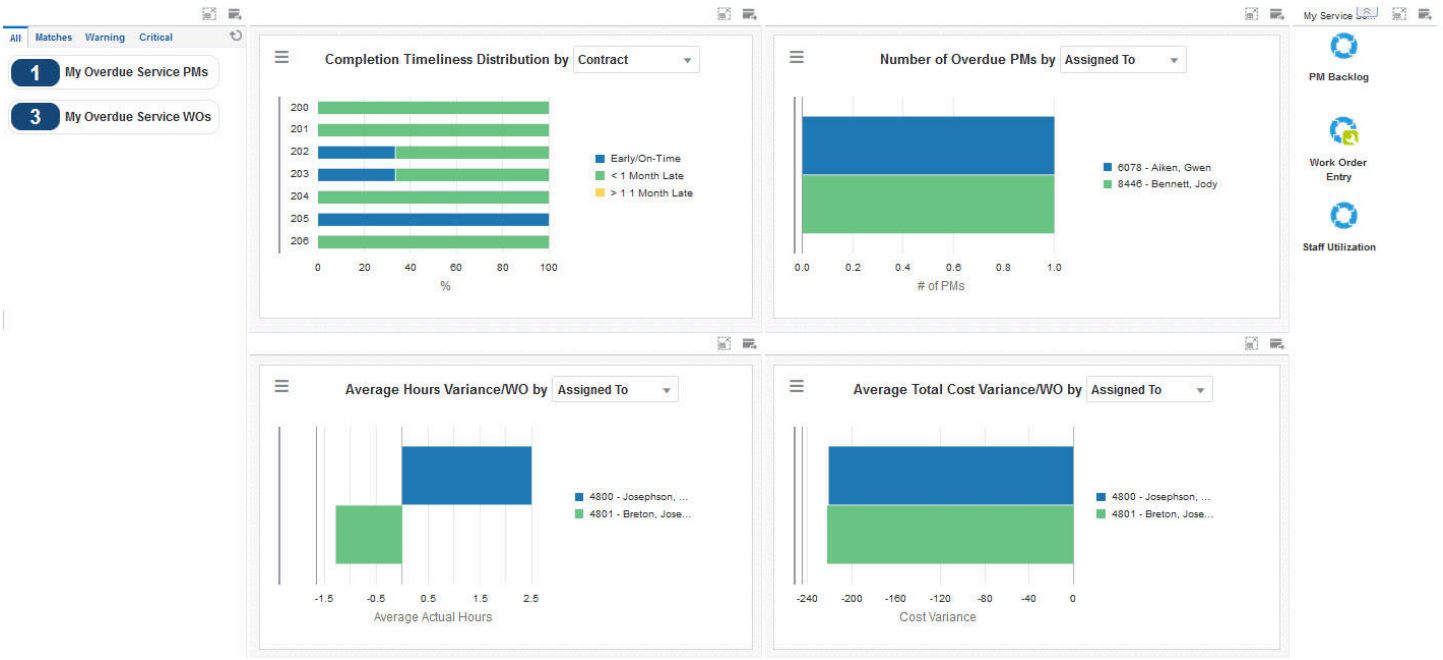
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* .
- *Entering Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide* .
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide* .
- *Creating Work Orders Using the Work Order Entry Programs (P48201/P17714)* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* .
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# UX One: My Service Schedule Page

The My Service Schedule page (P17005X/W17005XB) enables users to receive alerts regarding overdue work orders and preventive maintenance records. The page also displays several graphs that enable the field service supervisor to accurately schedule upcoming work for their team. The page also provides access to programs and pages that enable users to quickly act on the information provided on the page.

To access the UX One My Service Schedule page, log in to the EnterpriseOne system using the Field Service Supervisor role. When you log in with this role, the system automatically displays the Field Service Supervisor page. Click the My Service Schedule task on the springboard to access the My Service Schedule page.

This graphic illustrates the My Service Schedule page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the My Service Schedule page:

| Watchlist Alert | Description |
|---|---|
| My Overdue Service PMs | This alert tells users how many of their service work orders are currently overdue.<br><br>This alert is based on the Preventive Maintenance Backlog Program (P12071, version ZJDE0003).<br><br>When you click the alert, the system displays the PM Backlog form. The following grid formats are available:<br><br>• Basic |

| Watchlist Alert | Description |
|---|---|
| My Overdue Service WOs | This alert tells users how many of their preventive maintenance records are currently overdue.<br><br>This alert is based on the Scheduling Workbench program (P48201, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Work Orders form. The following form layouts are available:<br><br>• Service WOs<br>The following grid formats are available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide .*
- *Managing Work Orders* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide .*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the My Service Schedule page:

| Component Title | Description |
|---|---|
| Completion Timeliness Distribution by (P13560X/W13560XM) | Use this chart to view work order completion statistics for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Contract<br>• Customer<br>• Lead Craft<br>• Product Family<br>• Product Model<br>• Site<br>• Supervisor |
| Number of Overdue PMs by (P13570X/W13570XB) | Use this chart to view the number of overdue preventive maintenance records for your team.<br><br>This chart is based on the One View PM Analysis program (P13570).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options: |

| Component Title | Description |
|---|---|
| | • Assigned To<br>• Customer<br>• Service Type<br>• Site |
| Average Hours Variance/WO by (P13560X/W13560XO) | Use this chart to view the actual hours by work order for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Contract<br>• Customer<br>• Product Family<br>• Product Model<br>• Site |
| Average Total Cost Variance/WO by (P13560X/W13560XN) | Use this chart to view the cost variance for each work order for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Contract<br>• Customer<br>• Product Family<br>• Product Model<br>• Site |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Work Order Analysis (P13560)*
- *One View PM Analysis (P13570)*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the My Service Schedule page:

| Task | Description |
|---|---|
| PM Backlog | Use this task to access the Preventive Maintenance Backlog program (P12071, ZJDE0003).<br>The following grid formats are available:<br>• Basic |
| Work Order Entry | Use this task to access the Work Order Entry program (P48201, ZJDE0002)<br>The following form layouts are available:<br>• Service WOs<br>The following grid formats are available:<br>• Simple |
| Staff Utilization | Use this task to access the Staff Utilization Chart program |

For additional information about the programs accessed by these tasks, see:

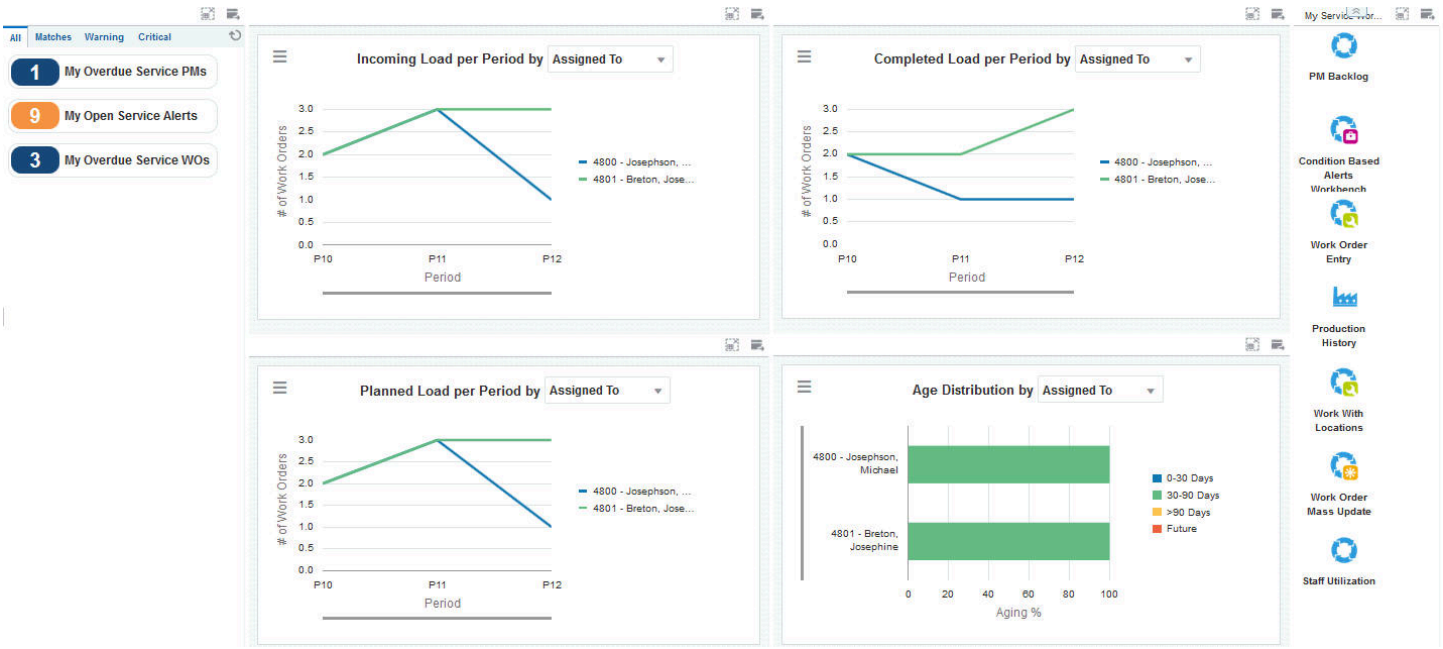
- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide .*
- *Creating Work Orders Using the Work Order Entry Programs (P48201/P17714)* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide .*
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# UX One: My Service Work Order Load Page

The My Service Work Order Load page (P17005X/W17005XC) enables users to receive alerts regarding overdue work orders, service alerts, and preventive maintenance records. It also enables users to view analytical data about the planned, incoming, and completed work order load for their team. Users can then access multiple programs that enable them to act on the information they see on the page.

To access the UX One My Service Work Order Load page, log in to the EnterpriseOne system using the Field Service Supervisor role. When you log in with this role, the system automatically displays the Field Service Supervisor page. Click the My Service Work Order Load task on the springboard to access the My Service Work Order Load page.

This graphic illustrates the My Service Work Order Load page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the My Service Work Order Load page:

| Watchlist Alert | Description |
|---|---|
| My Overdue Service PMs | This alert tells users how many of their service work orders are currently overdue.<br><br>This alert is based on the Preventive Maintenance Backlog Program (P12071, version ZJDE0003).<br><br>When you click the alert, the system displays the PM Backlog form. The following grid formats are available:<br><br>• Basic |
| My Open Service Alerts | This alert tells users how many service alerts are currently open. |

| Watchlist Alert | Description |
|---|---|
| | This alert is based on the Condition-Based Alerts Workbench program (P1310, version ZJDE0001).<br><br>When you click the alert, the system displays the Work With Condition-Based Alerts form. The following grid formats are available:<br><br>• Basic |
| My Overdue Service WOs | This alert tells users how many of their preventive maintenance records are currently overdue.<br><br>This alert is based on the Scheduling Workbench program (P48201, version ZJDE0002).<br><br>When you click the alert, the system displays the Work With Work Orders form. The following form layouts are available:<br><br>• Service WOs<br>The following grid formats are available:<br><br>• Simple |

For additional information about the programs associated with these watchlist alerts, see:

- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide .*
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide .*
- *Managing Work Orders* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide .*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the My Service Work Order Load page:

| Component Title | Description |
|---|---|
| Incoming Load Per Period by (P13560X/ W13560XT) | Use this chart to view the incoming work order load for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Contract<br>• Customer<br>• Site<br>• Supervisor |

| Component Title | Description |
|---|---|
| Completed Load per Period by (P13560X/W13560XE) | Use this chart to view completed work order load statistics for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |
| Planned Load Per Period by (P13560X/W13560XD) | Use this chart to view the planned work order load for your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Supervisor |
| Age Distribution by (P13560X/W13560XB) | Use this chart to view the age distribution of the work orders currently assigned to your team.<br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assigned To<br>• Business Unit<br>• Supervisor<br>• WO Type |

For additional information about the programs associated with these charts, see *One View Work Order Analysis (P13560)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the My Service Work Order Load page:

| Task | Description |
|---|---|
| PM Backlog | Use this task to access the Preventive Maintenance Backlog program (P12071, version ZJDE0003).<br>The following grid formats are available:<br>• Basic |
| Condition Based Alert Workbench | Use this task to access the Condition-Based Alerts Workbench program (P1310, version ZJDE0001).<br>The following grid formats are available: |

| Task | Description |
|---|---|
| | • Basic |
| Work Order Entry | Use this task to access the Work Order Entry program (P48201, version ZJDE0002)<br>The following form layouts are available:<br>• Service WOs<br>The following grid formats are available:<br>• Simple |
| Production History | Use this task to access the Production History program (P13227, version ZJDE0002).<br>The following grid formats are available:<br>• Basic |
| Work With Locations | Use this task to access the Work With Locations program (P12215, version ZJDE0001).<br>The following grid formats are available:<br>• Basic |
| Work Order Mass Update | Use this task to access the Work Order Mass Update program (P48022, version ZJDE0002). |
| Staff Utilization | Use this task to access the Staff Utilization Chart program |

For additional information about the programs accessed by these tasks, see:

- *Working with Preventive Maintenance Schedules* in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide* .
- *Entering Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide* .
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide* .
- *Creating Work Orders Using the Work Order Entry Programs (P48201/P17714)* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* .
- *Reviewing Work Order and Rate Schedule Information* in the *JD Edwards EnterpriseOne Applications Shop Floor Management Implementation Guide* .
- *Creating Asset Identification Information* in the *JD Edwards EnterpriseOne Applications Fixed Assets Implementation Guide* .
- *Viewing the Staff Utilization Chart* in the in the *JD Edwards EnterpriseOne Applictaions Resource Assignments Implementation Guide*

# 57 Service Management Roles: Service Agent Manager

## Understanding the Service Agent Manager UX One Role

The Service Agent Manager role, and the associated UX One pages and components, enable users to receive alerts regarding open, overdue, escalated, and entitled cases. The pages also enable service agent managers to review analytical information about case load, aging, and escalations across the service team. The pages also provide easy access to programs that enable the service agent manager to quickly respond to the data.

**Note:**

The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.

You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.

See *Understanding UX One Roles*.

## Prerequisites

Before using the Service Agent Manager role (SVCAMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the SVCAMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Service Agent Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Customer Service Management for Support.*

# Using the Service Agent Manager UX One Role

You use the Service Agent Manager role to access these UX One pages:

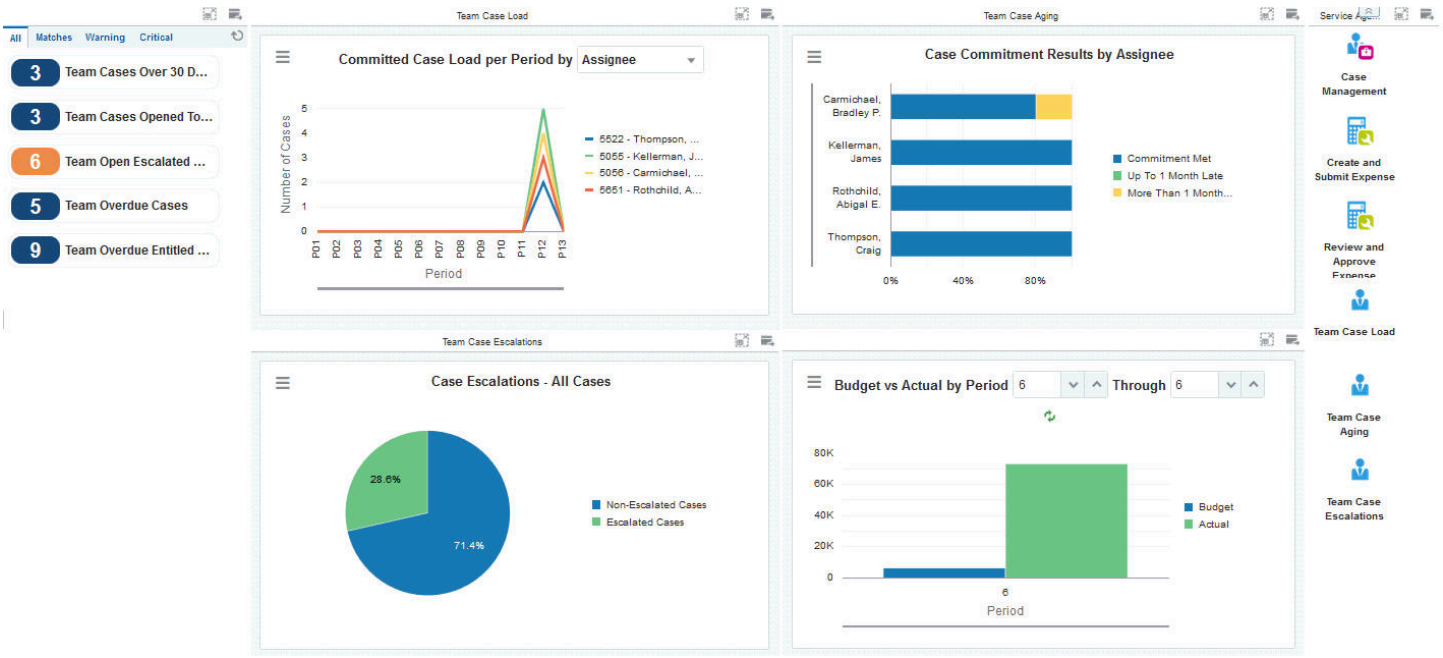
- Service Agent Manager (P17007X/W17007XA)
- Team Case Aging (P17007X/W17007XB)
- Team Case Escalations (P17007X/W17007XC)
- Team Case Load (P17007X/W17007XD)

## UX One: Service Agent Manager Page

The Service Agent Manager page (P17007X/W17007XA) enables users to receive alerts regarding open, overdue, and escalated cases within their service team. The page also provides analytical information about case commitments and aging, along with easy access to programs and pages that enable the service agent manager to easily act upon the data they see on the page.

To access the UX One Service Agent Manager page, log in to the EnterpriseOne system using the Service Agent Manager role.

This graphic illustrates the Service Agent Manager page:




## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Service Agent Manager page:

| Watchlist Alert | Description |
|---|---|
| Team Cases Over 30 Days | This alert tells users how many open cases the team has that are over 30 days old.<br><br>This alert is based on the Work With Case program (P17500).<br><br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br><br>• Work With Tasks<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Team Cases Opened Today | This alert tells users how many cases the team opened today.<br>This alert is based on the Work With Case program (P17500).<br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |
| Team Open Escalated Cases | This alert tells users how many open escalated cases the team currently has.<br>This alert is based on the Work With Case program (P17500).<br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |
| Team Overdue Cases | This alert tells users how many overdue cases the team currently has.<br>This alert is based on the Work With Case program (P17500).<br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |
| Team Overdue Entitled Cases | This alert tells users how many overdue entitled cases the team currently has.<br>This alert is based on the Work With Case program (P17500).<br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

**Charts**

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Agent Manager page:

| Component Title | Description |
|---|---|
| Committed Case Load Per Period (P90CG53X/W90CG53XQ) | Use this chart to view the number of committed cases per period for each assignee on your team.<br>This chart is based on the One View Case Management Inquiry program (P90CG530).<br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assignee<br>• Case Type<br>• Provider Group |
| Case Commitment Results by Assignee (P90CG53X/W90CG53XH) | Use this chart to view closed case commitment statistics for each assignee on your team.<br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Case Escalations - All Cases (P90CG53X/W90CG53XM) | Use this chart to view the percentage of current cases that are escalated and non-escalated.<br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Budget vs Actual by Period (P09217X/W09217XB) | Use this chart to compare budgeted amounts versus actual amounts by period.<br>This chart is based on the One View Account Balance Inquiry program (P09217).<br>Additionally, you can use the drop-down menu on the top of the chart to specify the periods to include. |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Case Management Inquiry (P90CG530)*
- *One View Account Balance Inquiry (P09217)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Service Agent Manager page:

| Task | Description |
|---|---|
| Case Management | Use this task to access the Work With Case program (P17500, ZJDE0001).<br>The following form layouts are available: |

| Task | Description |
|---|---|
| | • Work With Tasks<br>The following grid formats are available:<br>• Simple |
| Create and Submit Expense | Use this task to access the Expense Report Entry program (P09E2011, version ZJDE0002). |
| Review and Approve Expense | Use this task to access the Expense Report Entry program (P09E2011, version ZJDE0003). |
| Team Case Load | Use this task to access the UX One Team Case Load page. |
| Team Case Aging | Use this task to access the UX One Team Case Aging page. |
| Team Case Escalations | Use this task to access the UX One Team Case Escalations page. |

For additional information about the programs accessed by these tasks, see:

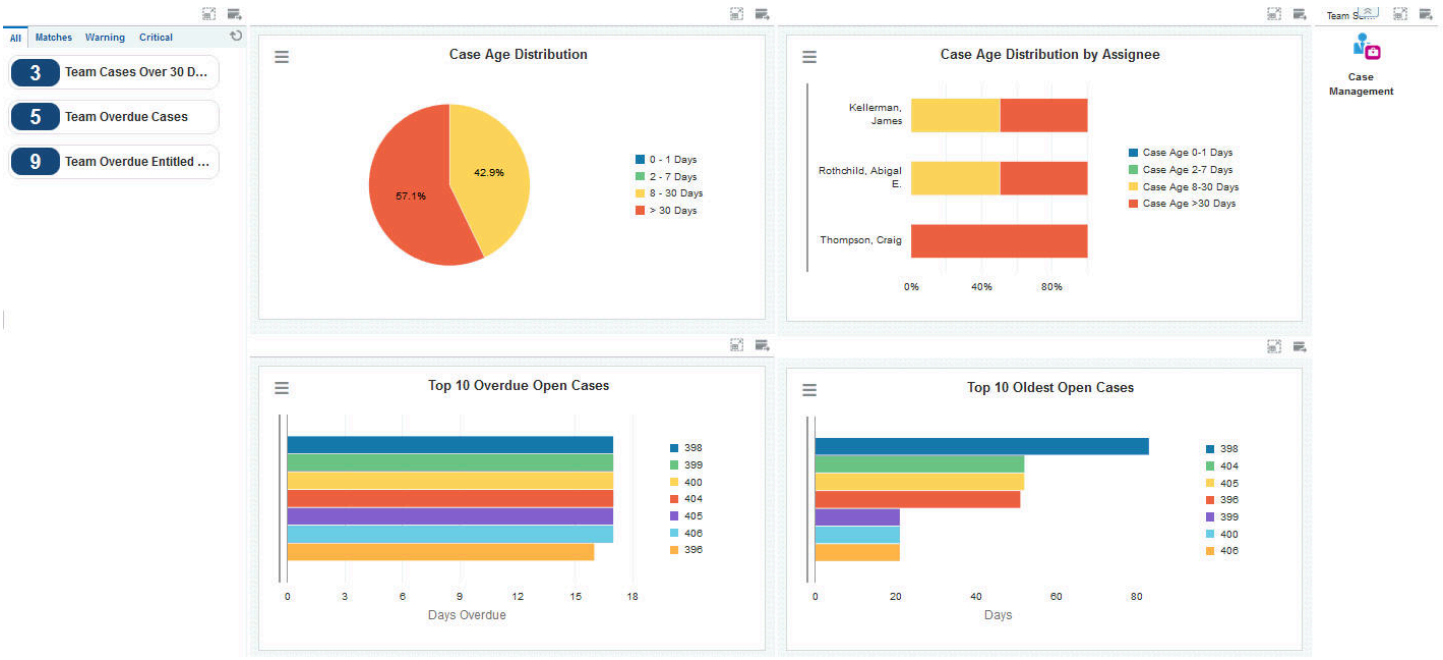
- *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide*
- *Entering Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*

# UX One: Team Case Aging Page

The Team Case Aging page (P17007X/W17007XB) enables users to receive alerts on overdue cases, and on cases that have been open for an extended period of time. The page provides analytical data about case aging across the service team, and enables user to easily access programs they need to act on the data.

To access the UX One Team Case Aging page, log in to the EnterpriseOne system using the Service Agent Manager role. When you log in with this role, the system automatically displays the Service Agent Manager page. Click the Team Case Aging task on the springboard to access the Team Case Aging page.

This graphic illustrates the Team Case Aging page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Team Case Aging page:

| Watchlist Alert | Description |
|---|---|
| Team Cases Over 30 Days | This alert tells users how many open cases the team has that are over 30 days old.<br><br>This alert is based on the Work With Case program (P17500).<br><br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br><br>• Work With Tasks<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Team Overdue Cases | This alert tells users how many overdue cases the team currently has.<br>This alert is based on the Work With Case program (P17500).<br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |
| Team Overdue Entitled Cases | This alert tells users how many overdue entitled cases the team currently has.<br>This alert is based on the Work With Case program (P17500).<br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Case Aging page:

| Component Title | Description |
|---|---|
| Case Age Distribution (P90CG53X/W90CG53XD) | Use this chart to view the aging distribution of the cases on your team.<br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Case Age Distribution by Assignee (P90CG53X/W90CG53XN) | Use this chart to view the aging distribution of cases on your team by assignee.<br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Top 10 Overdue Open Cases (P90CG53X/W90CG53XI) | Use this chart to view the top 10 overdue cases that are currently open.<br>This chart is based on the One View Case Management Inquiry program (P90CG530). |

| Component Title | Description |
| --- | --- |
| Top 10 Oldest Open Cases (P90CG53X/ W90CG53XG) | Use this chart to view the top 10 oldest cases that are currently overdue.<br>This chart is based on the One View Case Management Inquiry program (P90CG530). |

For additional information about the programs associated with these charts, see *One View Case Management Inquiry (P90CG530)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Case Aging page:

| Task | Description |
| --- | --- |
| Case Management | Use this task to access the Work With Case program (P17500, ZJDE0001).<br>The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |

For additional information about the programs accessed by these tasks, see *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

# UX One: Team Case Escalations Page

The Team Case Escalations page (P17007X/W17007XC) enables users to receive alerts regarding escalated cases within their service team, and to view analytical information about escalated cases. The page also provides easy access to the Case Management program, which enables service agent managers to easily act upon the data they see on the page.

To access the UX One Team Case Escalations page, log in to the EnterpriseOne system using the Service Agent Manager role. When you log in with this role, the system automatically displays the Service Agent Manager page. Click the Team Case Escalations task on the springboard to access the Team Case Escalations page.

This graphic illustrates the Team Case Escalations page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Team Case Escalations page:

| Watchlist Alert | Description |
|---|---|
| Team Open Escalated Cases | This alert tells users how many open escalated cases the team currently has.<br><br>This alert is based on the Work With Case program (P17500).<br><br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br><br>• Work With Tasks<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |

For additional information about the programs associated with these watchlist alerts, see *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Case Escalations page:

| Component Title | Description |
|---|---|
| Case Escalations - All Cases (P90CG53X/W90CG53XM) | Use this chart to view the percentage of current cases that are escalated and non-escalated.<br><br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Top 10 most Cases by Customer (P90CG53X/W90CG53XL) | Use this chart to view the top 10 customers with the most escalated cases.<br><br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Case Escalations - Top 10 (P90CG53X/W90CG53XO) | Use this chart to view the top 10 entities with the most escalated cases.<br><br>This chart is based on the One View Case Management Inquiry program (P90CG530).<br><br>Additionally, you can use the drop-down option at the top of the chart to change the data that the system displays by selecting one of these options:<br><br>• Assignee<br>• Provider Group |
| Case Escalations - Top 10 (P90CG53X/W90CG53XO) | Use this chart to view the top 10 entities with the highest percentage of current cases that are escalated.<br><br>This chart is based on the One View Case Management Inquiry program (P90CG530).<br><br>Additionally, you can use the drop-down option at the top of the chart to change the data that the system displays by selecting one of these options:<br><br>• Assignee<br>• Provider Group |

For additional information about the programs associated with these charts, see *One View Case Management Inquiry (P90CG530)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Case Escalations page:

| Task | Description |
|---|---|
| Case Management | Use this task to access the Work With Case program (P17500, ZJDE0001).<br>The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |

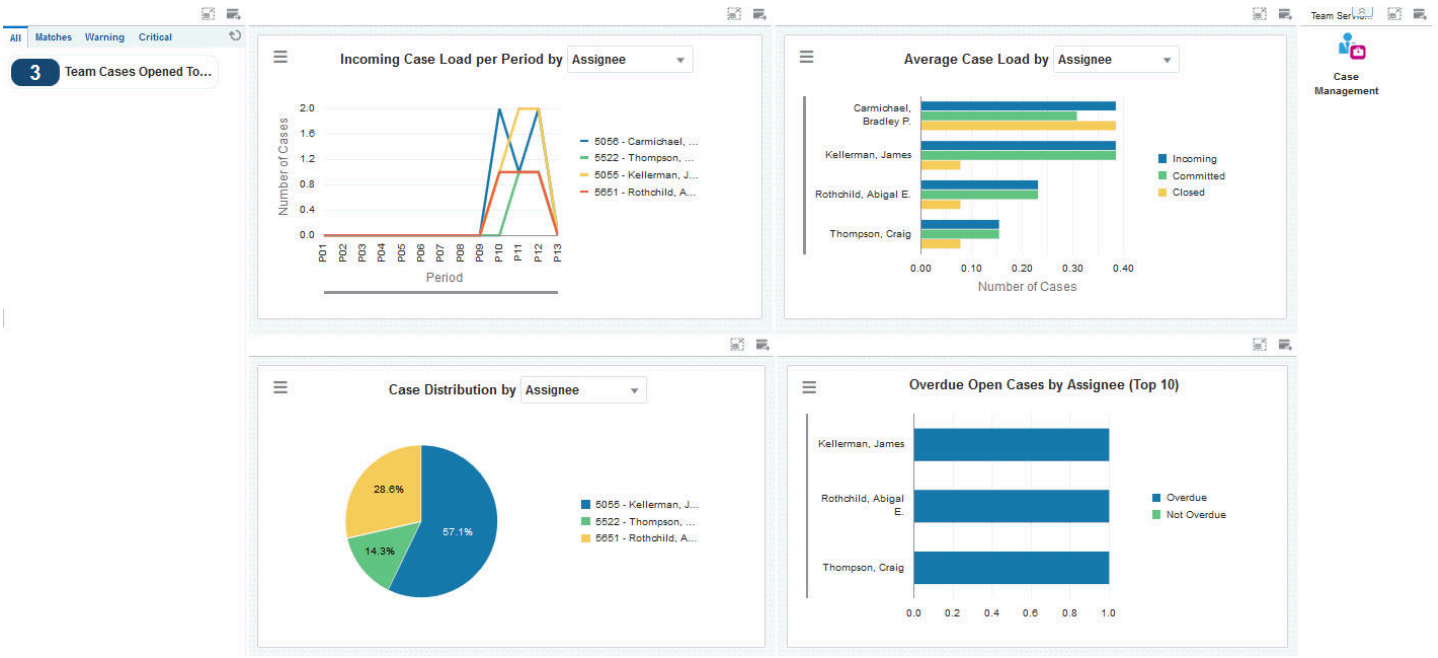
For additional information about the programs accessed by these tasks, see *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

# UX One: Team Case Load Page

The Team Case Load page (P17007X/W17007XD) enables users to receive alerts regarding the number of cases opened today for their service team. The page also provides analytical information about case load, and provides easy access to programs and pages that enable the service agent manager to easily act upon the data they see on the page.

To access the UX One Team Case Load page, log in to the EnterpriseOne system using the Service Agent Manager role. When you log in with this role, the system automatically displays the Service Agent Manager page. Click the Team Case Load task on the springboard to access the Team Case Load page.

This graphic illustrates the Team Case Load page:




## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Team Case Load page:

| Watchlist Alert | Description |
|---|---|
| Team Cases Opened Today | This alert tells users how many cases the team opened today.<br><br>This alert is based on the Work With Case program (P17500).<br><br>When you click the alert, the system displays the Work With Case Management form. The following form layouts are available:<br><br>• Work With Tasks<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |

For additional information about the programs associated with these watchlist alerts, see *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Case Load page:

| Component Title | Description |
|---|---|
| Incoming Case Load Per Period (P90CG53X/W90CG53XP) | Use this chart to view the number of incoming cases per period for each assignee on your team.<br>This chart is based on the One View Case Management Inquiry program (P90CG530).<br>Additionally, you can use the drop-down menu at the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assignee<br>• Case Type<br>• Provider Group |
| Avg Case Load (P90CG53X/W90CG53XB) | Use this chart to view the average case load per period.<br>This chart is based on the One View Case Management Inquiry program (P90CG530).<br>Additionally, you can use the drop-down menu at the top of the chart to change the data that the system displays. You can select one of these options:<br>• Assignee<br>• Provider Group |
| Case Distribution (P90CG53X/ W90CG53XE) | Use this chart to view the case distribution across your team.<br>This chart is based on the One View Case Management Inquiry program (P90CG530). You can select one of these options:<br>• Assignee<br>• Status |
| Overdue Open Cases by Assignee (Top 10) (P90CG53X/W90CG53XJ) | Use this chart to view the top 10 assignees, based on the number of overdue open cases they have.<br>This chart is based on the One View Account Balance Inquiry program (P09217). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Case Management Inquiry (P90CG530)*

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Case Load page:

| Task | Description |
|---|---|
| Case Management | Use this task to access the Work With Case program (P17500, ZJDE0001).<br>The following form layouts are available:<br>• Work With Tasks<br>The following grid formats are available:<br>• Simple |

For additional information about the programs accessed by these task, see:

- *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide*

# 58 Service Management Roles: Service Contract Manager

## Understanding the Service Contract Manager UX One Role

The Service Contract Manager role, and the associated UX One pages and components, enable users to manage service contracts for their team. Users can receive alerts about expired and soon-to-expire contracts, review analytical data about contract profitability, and access programs that enable them to quickly and easily act on the data they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Service Contract Manager role (SCONMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the SCONMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Service Contract Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Service Management.*

# Using the Service Contract Manager UX One Role

You use the Service Contract Manager role to access these UX One pages:

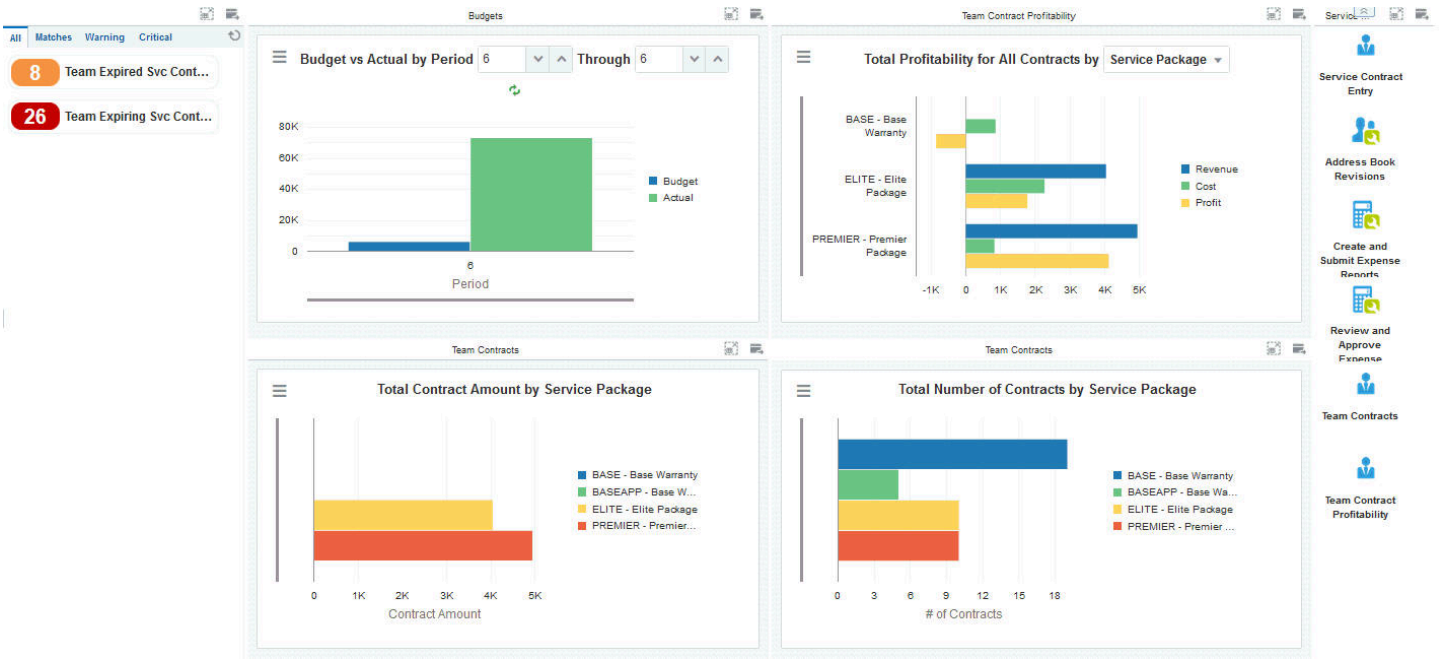
- Service Contract Manager (P17003X/W17003XA)
- Team Contracts (P17003X/W17003XB)
- Team Contract Profitability (P17003X/W17003XC)

## UX One: Service Contract Manager Page

The Service Contract Manager page (P17003X/W17003XA) enables users to receive alerts about contracts that have expired or are expiring soon, and to view analytical data about service contracts, and to access programs and pages. The Service Contract Manager page also provides easy access to frequently accessed programs and other UX One pages.

To access the UX One Service Contract Manager page, log in to the EnterpriseOne system using the Service Contract Manager role.

This graphic illustrates the Service Contract Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Service Contract Manager page:

| Watchlist Alert | Description |
|---|---|
| Team Expired Svc Contracts | This alert tells users how many service contracts have expired for the team.<br><br>This alert is based on the Work With Contracts program (P1720).<br><br>When you click the alert, the system displays the Work With Contracts form. The following form layouts are available:<br><br>• Service Contract Header<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |
| Team Expiring Svc Contracts | This alert tells users how many of the team's service contracts are going to expire soon.<br>This alert is based on the Work With Contracts program (P1720).<br>When you click the alert, the system displays the Work With Contracts form. The following form layouts are available:<br>• Service Contract Header<br>The following grid formats are available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see *Managing Contracts* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Contract Manager page:

| Component Title | Description |
|---|---|
| Budget vs Actual by Period (P09217X/W09217XB) | Use this chart to view the budget amounts in comparison to the actual amounts by period.<br>This chart is based on the One View Account Balance Inquiry program (P09217).<br>You can use the fields at the top of the chart to specify which periods you want to use when creating the chart. |
| Total Profitability for All Contracts by (P1730X/W1730XB) | Use this chart to view total profitability for all contracts for your team.<br>This chart is based on the One View Service Contract Profitability Inquiry program (P1730).<br>Additionally, you can use the drop down menu at the top of the chart to display data by:<br>• Contract<br>• Contract Type<br>• Customer<br>• Product Family<br>• Service Package |
| Total Contract Amount by Service Package (P1727X/W1727XF) | Use this chart to view the total amounts for all contracts by service package for your team.<br>This chart is based on the One View Service Contract Inquiry program (P1727). |

| Component Title | Description |
|---|---|
| Total Number of Contracts by Service Package (P1727X/W1727XE) | Use this chart to view the total number of contracts by service package for your team.<br>This chart is based on the One View Service Contract Inquiry program (P1727). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Account Balance Inquiry (P09217)*
- *One View Reporting for Service Management*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Service Contract Manager page:

| Task | Description |
|---|---|
| Service Contract Entry | Use this task to access the Work With Contracts program (P1720).<br>The following form layouts are available:<br>• Service Contract Header<br>The following grid formats are available:<br>• Simple |
| Address Book Revisions | Use this task to access the Address Book Revisions program (P01012). |
| Create and Submit Expense Reports | Use this task to access the Expense Entry program (P09E2011, version ZJDE0002). |
| Review and Approve Expense Reports | Use this task to access the Expense Entry program (P09E2011, version ZJDE0003). |
| Team Contracts | Use this task to access the Team Contracts UX One page. |
| Team Contract Profitability | Use this task to access the Team Contract Profitability UX One page. |

For additional information about the programs accessed by these tasks, see:

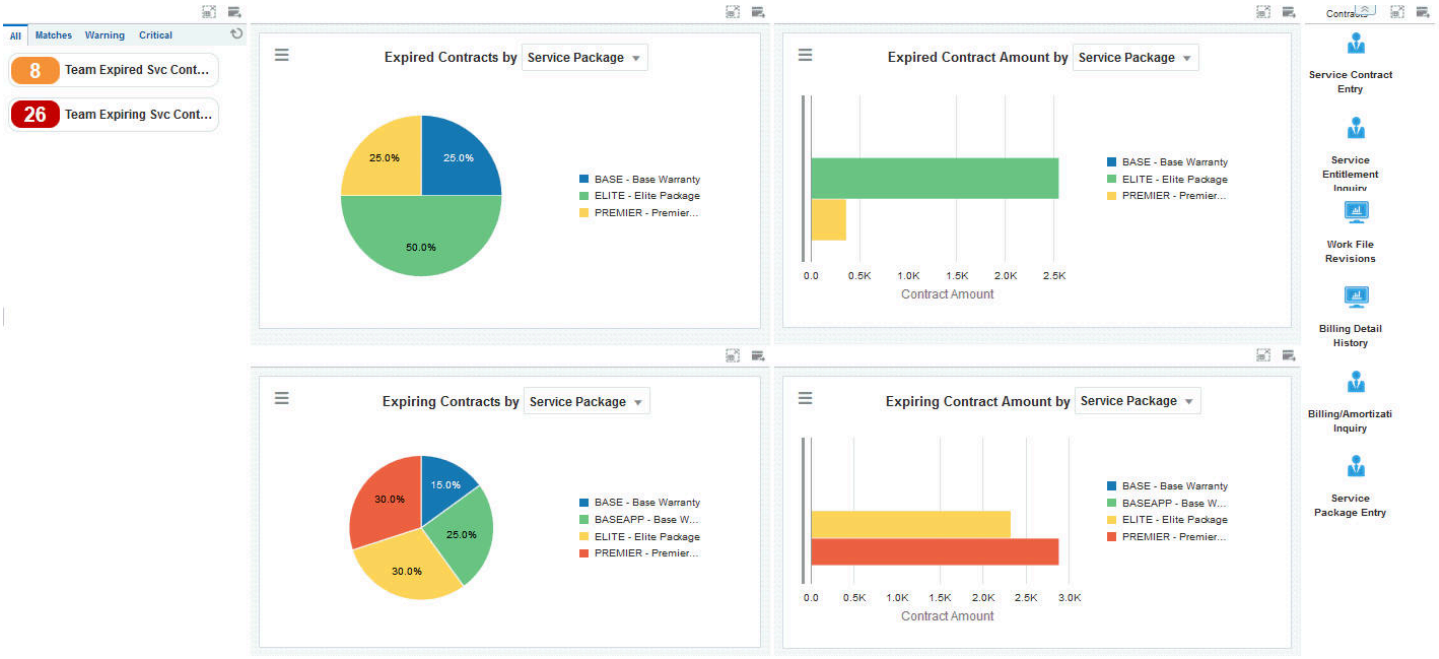
- *Managing Contracts* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Entering Address Book Records* in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*
- *Entering Expense Reports* and *Revising and Approving Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*

# UX One: Team Contracts Page

The Team Contracts page (P17003X/W17003XB) enables users to receive alerts and review analytical data about contracts that have expired or are expiring soon. The Team Contracts page also provides easy access to frequently accessed programs.

To access the UX One Team Contracts page, log in to the EnterpriseOne system using the Service Contract Manager role. When you log in with this role, the system automatically displays the Service Contract Manager page. Click the Team Contracts task on the springboard to access the Team Contracts page.

This graphic illustrates the Team Contracts page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Team Contracts page:

| Watchlist Alert | Description |
|---|---|
| Team Expired Svc Contracts | This alert tells users how many service contracts have expired for the team.<br>This alert is based on the Work With Contracts program (P1720).<br>When you click the alert, the system displays the Work With Contracts form. The following form layouts are available:<br>• Service Contract Header<br>The following grid formats are available:<br>• Simple |
| Team Expiring Svc Contracts | This alert tells users how many of the team's service contracts are going to expire soon.<br>This alert is based on the Work With Contracts program (P1720).<br>When you click the alert, the system displays the Work With Contracts form. The following form layouts are available:<br>• Service Contract Header<br>The following grid formats are available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see *Managing Contracts* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Contracts page:

| Component Title | Description |
|---|---|
| Expired Contracts by (P1727X/W1727XA) | Use this chart to view the percentage of expired service contracts by service package for your team.<br>This chart is based on the One View Service Contract Inquiry program (P1727).<br>Additionally, you can use the drop down menu at the top of the chart to display data by:<br>• Customer<br>• Product Family<br>• Service Package |

| Component Title | Description |
|---|---|
| | • Site |
| Expired Contract Amount by (P1727X/W1727XC) | Use this chart to view the total amounts for all expired contracts by service package for your team.<br>This chart is based on the One View Service Contract Inquiry program (P1727).<br>Additionally, you can use the drop down menu at the top of the chart to display data by:<br>• Customer<br>• Product Family<br>• Service Package<br>• Site |
| Expiring Contracts by (P1727X/W1727XB) | Use this chart to view the percentage of expiring contracts by service package for your team.<br>This chart is based on the One View Service Contract Inquiry program (P1727).<br>Additionally, you can use the drop down menu at the top of the chart to display data by:<br>• Customer<br>• Product Family<br>• Service Package<br>• Site |
| Expiring Contract Amount by (P1727X/W1727XD) | Use this chart to view the amounts of expiring contracts by service package for your team.<br>This chart is based on the One View Service Contract Inquiry program (P1727).<br>Additionally, you can use the drop down menu at the top of the chart to display data by:<br>• Customer<br>• Product Family<br>• Service Package<br>• Site |

For additional information about the programs associated with these charts, see *One View Reporting for Service Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Contracts page:

| Task | Description |
|---|---|
| Service Contract Entry | Use this task to access the Work With Contracts program (P1720).<br>The following form layouts are available: |

| Task | Description |
|---|---|
| | • Service Contract Header<br>The following grid formats are available:<br>• Simple |
| Service Entitlement Inquiry | Use this task to access the Service Entitlement Inquiry program (P1723). |
| Workfile Revisions | Use this task to access the Workfile Revisions program (P4812, version ZJDE0002).<br>The following grid formats are available:<br>• Simple |
| Billing Detail History | Use this task to access the Workfile History Inquiry program (P4812H, version ZJDE0002).<br>The following grid formats are available:<br>• Simple |
| Billing/ Amortization Inquiry | Use this task to access the Billing/Amortization Inquiry program (P1794). |
| Service Package Entry | Use this task to access the Service Contract Revision program (P1729).<br>The following form layouts are available:<br>• Revise Contract Svc Pkg<br>The following grid formats are available:<br>• Simple |

For additional information about the programs accessed by these tasks, see:

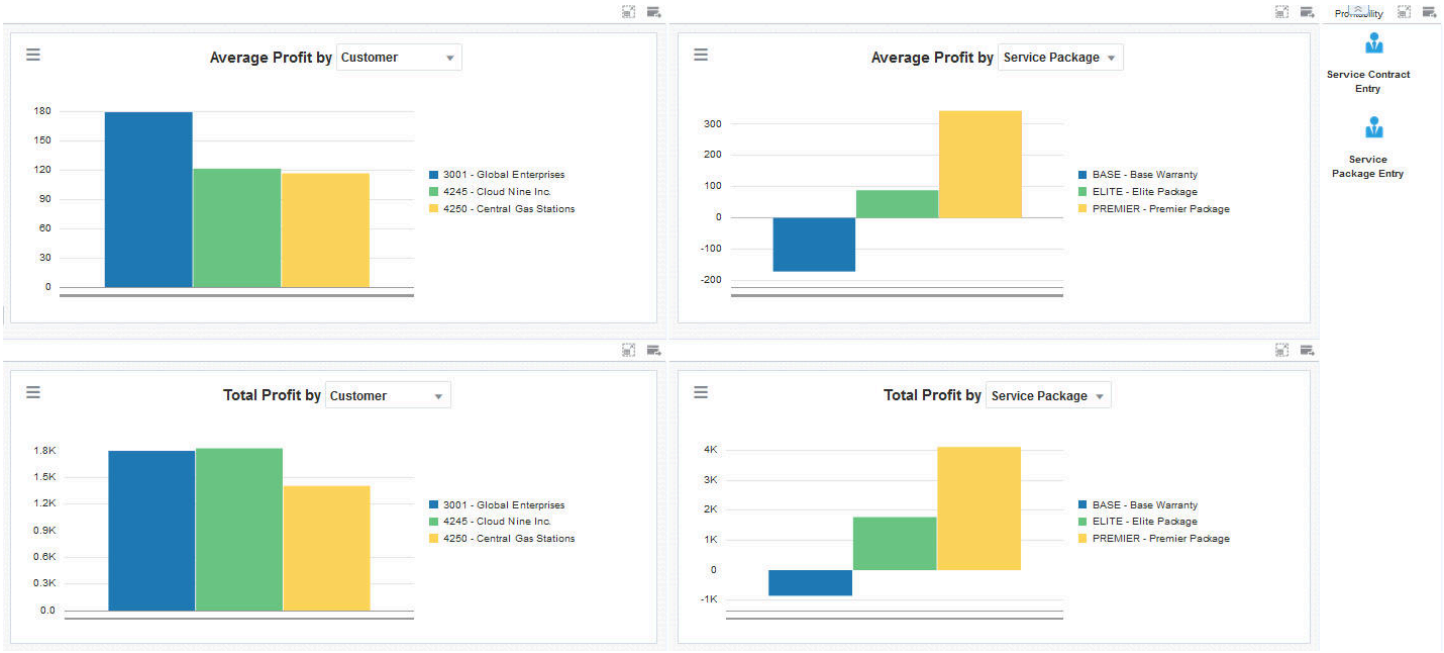
- *Managing Contracts* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Reviewing Entitlement Information for Service Contracts* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Managing the Workfile* in the *JD Edwards EnterpriseOne Applications Contract and Service Billing Implementation Guide*
- *Reviewing Amortization Records* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Entering Service Package Information* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*

# UX One: Team Contract Profitability Page

The Team Contract Profitability page (P17003X/W17003XC) enables users to review analytical data about contract profitability. The Team Contract Profitability page also provides easy access to frequently accessed programs.

To access the UX One Team Contract Profitability page, log in to the EnterpriseOne system using the Service Contract Manager role. When you log in with this role, the system automatically displays the Service Contract Manager page. Click the Team Contract Profitability task on the springboard to access the Team Contract Profitability page.

This graphic illustrates the Team Contract Profitability page:




## Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Team Contract Profitability page:

| Component Title | Description |
|---|---|
| Average Profit By (P1730X/W1730XC) | Use this chart to view the average profit amount by contract type for your team.<br><br>This chart is based on the One View Service Contract Profitability Inquiry program (P1730). |

| Component Title | Description |
|---|---|
| | Additionally, you can use the drop down field at the top of the chart to view data by:<br>• Contract<br>• Contract Type<br>• Customer<br>• Product Family<br>• Service Package |
| Average Profit By (P1730X/W1730XC) | Use this chart to view the average profit amount by service package for your team.<br>This chart is based on the One View Service Contract Profitability Inquiry program (P1730).<br>Additionally, you can use the drop down field at the top of the chart to view data by:<br>• Contract<br>• Contract Type<br>• Customer<br>• Product Family<br>• Service Package |
| Total Profit By (P1730X/W1730XD) | Use this chart to view the total profit amount by contract type for your team.<br>This chart is based on the One View Service Contract Profitability Inquiry program (P1730).<br>Additionally, you can use the drop down field at the top of the chart to view data by:<br>• Contract<br>• Contract Type<br>• Customer<br>• Product Family<br>• Service Package |
| Total Profit By (P1730X/W1730XD) | Use this chart to view the total profit amount by service package for your team.<br>This chart is based on the One View Service Contract Profitability Inquiry program (P1730).<br>Additionally, you can use the drop down field at the top of the chart to view data by:<br>• Contract<br>• Contract Type<br>• Customer<br>• Product Family<br>• Service Package |

For additional information about the programs associated with these charts, see *One View Reporting for Service Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

**Springboard Tasks**

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Team Contract Profitability page:

| Task | Description |
|---|---|
| Service Contract Entry | Use this task to access the Work With Contracts program (P1720).<br>The following form layouts are available:<br>• Service Contract Header<br>The following grid formats are available:<br>• Simple |
| Service Package Entry | Use this task to access the Service Contract Revision program (P1729).<br>The following form layouts are available:<br>• Revise Contract Svc Pkg<br>The following grid formats are available:<br>• Simple |

For additional information about the programs accessed by these tasks, see these topics in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*:

- *Managing Contracts*
- *Entering Service Package Information*

# 59 Service Management Roles: Service Operations Manager

## Understanding the Service Operations Manager UX One Role

The Service Operations Manager role, and the associated UX One pages and components, enable management personnel in a service organization to receive alerts, analyze data, and quickly and easily perform actions required to manage their team.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Service Operations Manager role (SOPMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the SOPMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Service Operations Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Service Management.*

# Using the Service Operations Manager UX One Role

You use the Service Operations Manager role to access these UX One pages:

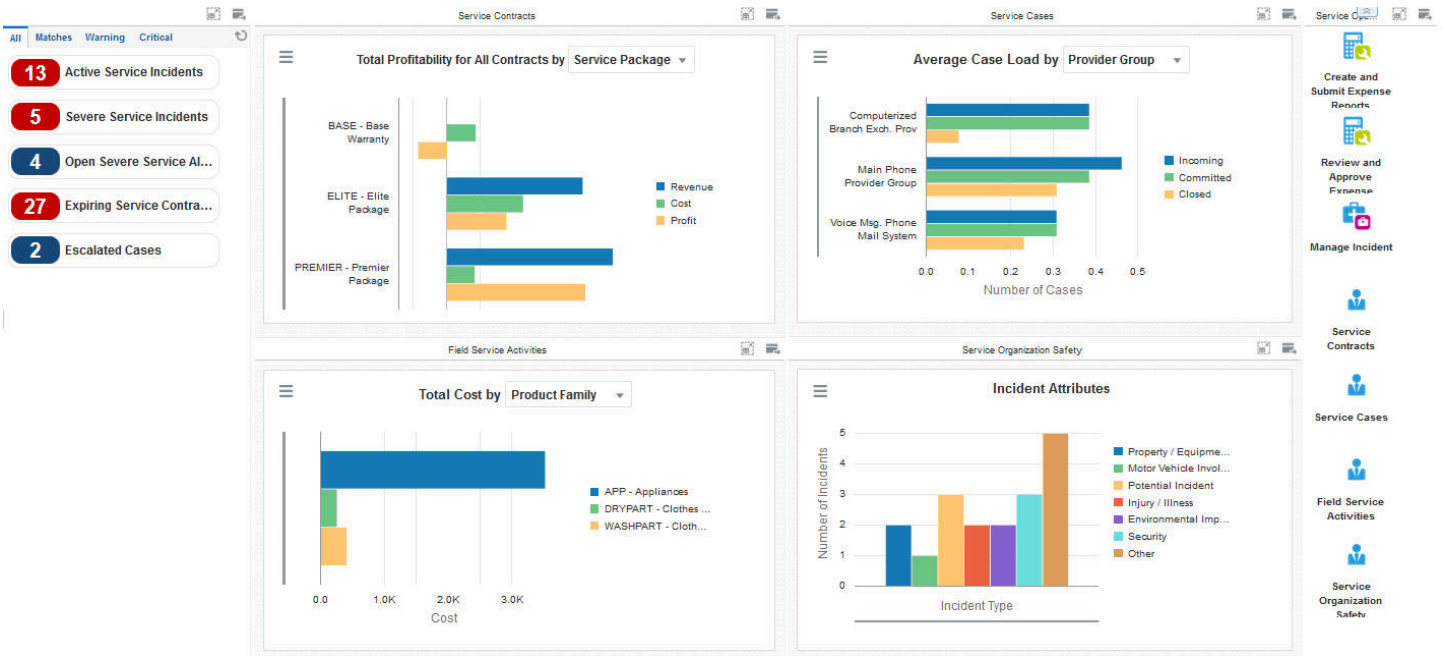
- Service Operations Manager (P17004X/W17004XD)
- Service Contracts (P17004X/W17004XB)
- Service Organization Safety (P17004X/W17004XE)
- Field Service Activities (P17004X/W17004XC)
- Service Cases (P17004X/W17004XA)

## UX One: Service Operations Manager Page

The Service Operations Manager page (P17004X/W17004XD) enables users to receive important alerts about incidents, service alerts, contracts, and cases that might require attention. The page also provides analytical data about the profitability, case load, costs, and incidents associated with the team. Additionally, the page provides links to frequently used pages and programs.

To access the UX One Service Operations Manager page, log in to the EnterpriseOne system using the Service Operations Manager role.

This graphic illustrates the Service Operations Manager page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Service Operations Manager page:

| Watchlist Alert | Description |
|---|---|
| Active Service Incidents | This alert tells users how many active service incidents their team currently has.<br><br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br><br>When you click the alert, the system displays the One View Incident Summary Inquiry form.<br><br>The following grid formats are available:<br><br>• Simple |

| Watchlist Alert | Description |
|---|---|
| Severe Service Incidents | This alert tells users how many severe service incidents their team currently has.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br>When you click the alert, the system displays the One View Incident Summary Inquiry form.<br>The following grid formats are available:<br>• Simple |
| Open Severe Service Alerts | This alert tells users how many open severe service alerts their team currently has.<br>This alert is based on the Condition-Based Alerts Workbench program (P1310).<br>When you click the alert, the system displays the Work With Condition-Based Alerts form. |
| Expiring Service Contracts | This alert tells users how many of the team's service contracts are going to expire soon.<br>This alert is based on the Work With Contracts program (P1720).<br>When you click the alert, the system displays the Work With Contracts form. The following form layouts are available:<br>• Service Contract Header<br>The following grid formats are available:<br>• Simple |
| Escalated Cases | This alert tells users how many escalated cases their team currently has.<br>This alert is based on the Case Entry program (P17500).<br>When you click the alert, the system displays the Work With Case Management form. |

For additional information about the programs associated with these watchlist alerts, see:

- *One View Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide*
- *Managing Contracts* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*
- *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Operations Manager page:

| Component Title | Description |
|---|---|
| Total Profitability for All Contracts by (P1730X/W1730XB) | Use this chart to view total profitability for all contracts for your team.<br>This chart is based on the One View Service Contract Profitability Inquiry program (P1730).<br>Additionally, you can use the drop down menu at the top of the chart to display data by:<br>• Contract<br>• Contract Type<br>• Customer<br>• Product Family<br>• Service Package |
| Average Case Load Per Period by (P90CG53X/W90CG53XB) | Use this chart to view the average case load per period for your team members.<br>This chart is based on the One View Case Management Inquiry program (P90CG530).<br>Additionally, you can use the drop down menu at the top of the chart to display data by:<br>• Assignee<br>• Provider Group |
| Total Cost by (P13560X/W13560XP) | Use this chart to view total cost by contract for your team.<br>This chart is based on the One View Work Order Analysis program (P13560).<br>Additionally, you can use the drop down menu at the top of the chart to display data by:<br>• Contract<br>• Customer<br>• Product Family<br>• Product Model<br>• Site |
| Incident Attributes (P54HS22X/ W54HS22XD) | Use this chart to view the total number of incidents for your team.<br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Reporting for Service Management*
- *One View Work Order Analysis (P13560)*
- *One View Incident Summary Inquiry (P54HS220)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Service Operations Manager:

| Task | Description |
|---|---|
| Create and Submit Expense Reports | Use this task to access the Expense Entry program (P09E2011, version ZJDE0002). |
| Review and Approve Expense Reports | Use this task to access the Expense Entry program (P09E2011, version ZJDE0003). |
| Manage Incident | Use this task to access the Incident Master program (P54HS00, version ZJDE0001). The following grid format is available:<br>• Simple |
| Service Contracts | Use this task to access the Service Contracts UX One page. |
| Service Cases | Use this task to access the Service Cases UX One page. |
| Field Service Activities | Use this task to access the Field Service Activities UX One page. |
| Service Organization Safety | Use this task to access the Service Organization Safety UX One page. |

For additional information about the programs accessed by these tasks, see:

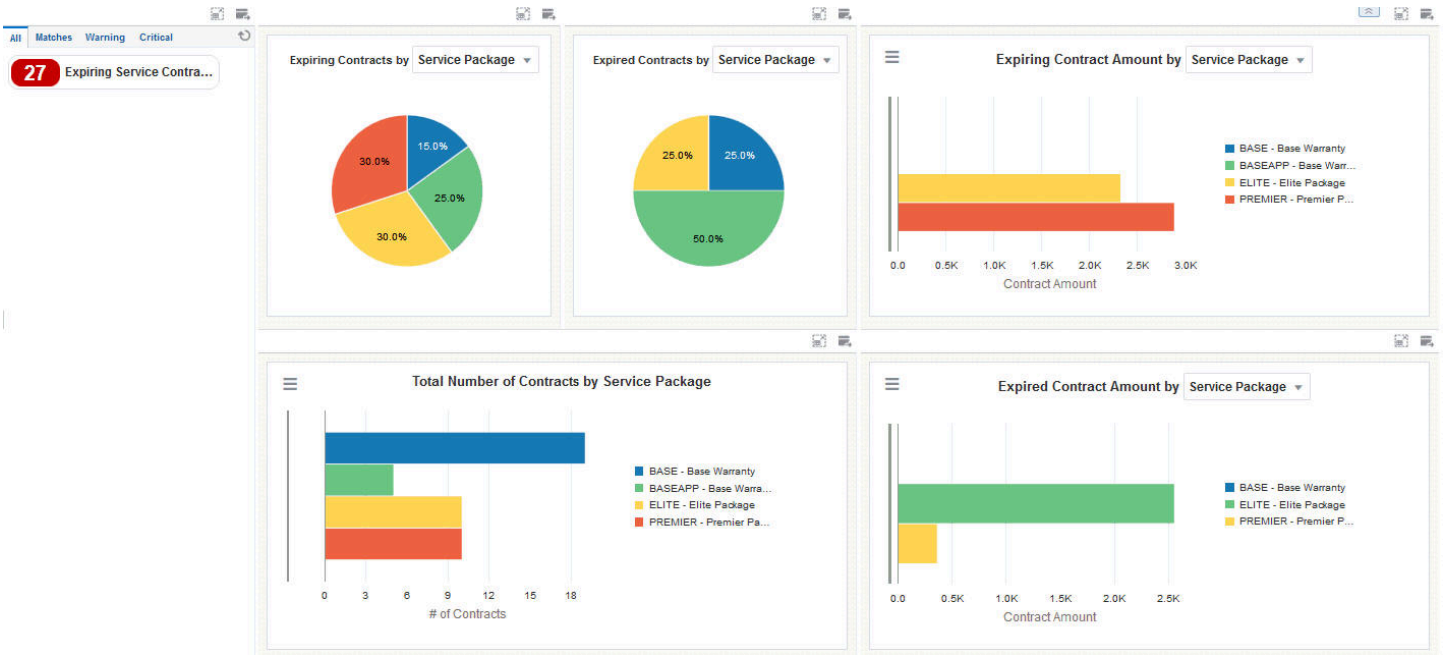
- *Entering Expense Reports* and *Revising and Approving Expense Reports* in the *JD Edwards EnterpriseOne Applications Expense Management Implementation Guide*
- *Entering and Managing Incidents* in the *JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implemenation Guide*

# UX One: Service Contracts Page

The Service Contracts page (P17004X/W17004XB) enables users to receive alerts when service contracts are expiring. The page also provides analytical data about the service contracts, and their related amounts, that are associated with your team.

To access the UX One Service Contracts page, log in to the EnterpriseOne system using the Service Operations Manager role. When you log in with this role, the system automatically displays the Service Operations Manager page. Click the Service Contracts task on the springboard to access the Service Contracts page.

This graphic illustrates the Service Contracts page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Service Contracts page:

| Watchlist Alert | Description |
|---|---|
| Expiring Service Contracts | This alert tells users how many of the team's service contracts are going to expire soon.<br><br>This alert is based on the Work With Contracts program (P1720).<br><br>When you click the alert, the system displays the Work With Contracts form. The following form layouts are available:<br><br>• Service Contract Header<br>The following grid formats are available: |

| Watchlist Alert | Description |
|---|---|
| | • Simple |

For additional information about the programs associated with these watchlist alerts, see *Managing Contracts* in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Contracts page:

| Component Title | Description |
|---|---|
| Expiring Contracts by Service Package (P1727X/W1727XB) | Use this chart to view the percentage of expiring contracts by service package for your team.<br><br>This chart is based on the One View Service Contract Inquiry program (P1727). |
| Expired Contracts by Service Package (P1727X/W1727XA) | Use this chart to view the percentage of expired service contracts by service package for your team.<br><br>This chart is based on the One View Service Contract Inquiry program (P1727). |
| Expiring Contract Amount by Service Package (P1727X/W1727XD) | Use this chart to view the amounts of expiring contracts by service package for your team.<br><br>This chart is based on the One View Service Contract Inquiry program (P1727). |
| Total Number of Contracts by Service Package (P1727X/W1727XE) | Use this chart to view the total number of contracts by service package for your team.<br><br>This chart is based on the One View Service Contract Inquiry program (P1727). |
| Expired Contract Amount by Service Package (P1727X/W1727XC) | Use this chart to view the total amounts for all expired contracts by service package for your team.<br><br>This chart is based on the One View Service Contract Inquiry program (P1727). |

For additional information about the programs associated with these charts, see *One View Reporting for Service Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

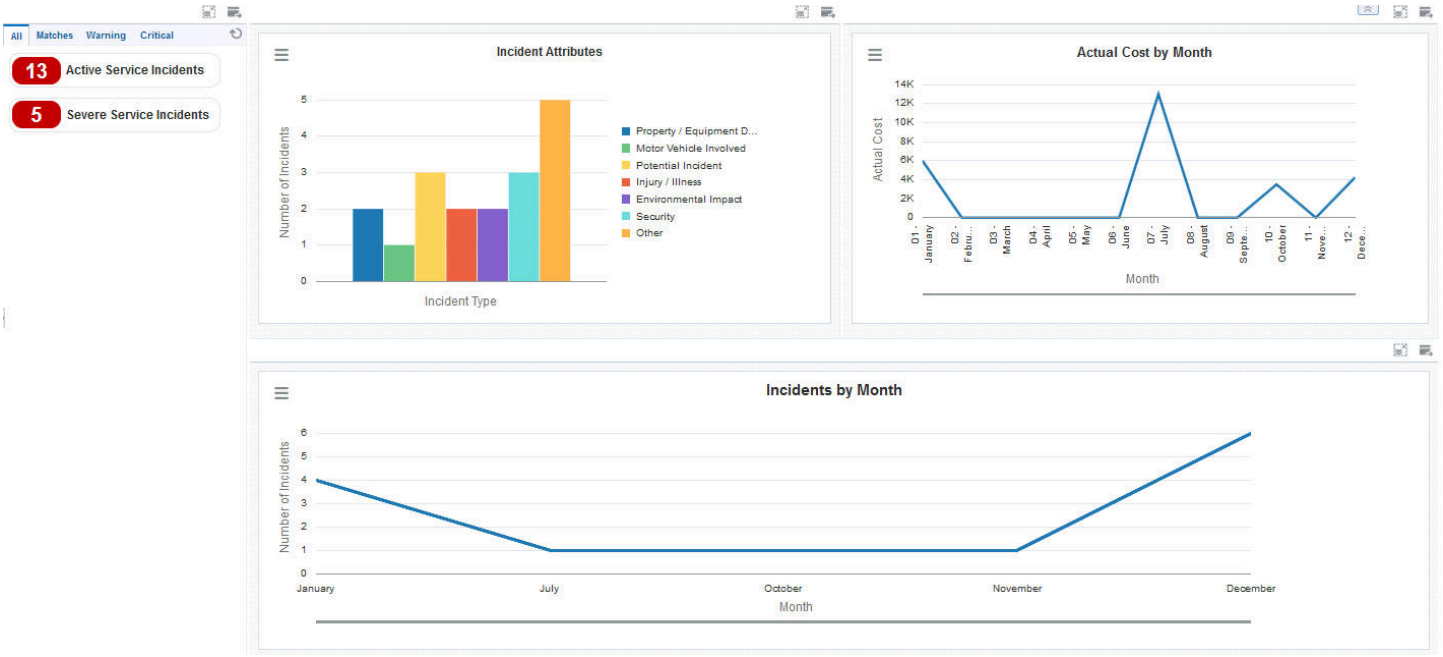
# UX One: Service Organization Safety Page

The Service Organization Safety page (P17004X/W17004XE) enables users to receive alerts about active and severe safety incidents associated with their team. The page also provides analytical data about the type, cost, and number of incidents associated with the team.

To access the UX One Service Organization Safety page, log in to the EnterpriseOne system using the Service Operations Manager role. When you log in with this role, the system automatically displays the Service Operations

Manager page. Click the Service Organization Safety task on the springboard to access the Service Organization Safety page.

This graphic illustrates the Service Organization Safety page:




## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Service Organization Safety page:

| Watchlist Alert | Description |
|---|---|
| Active Service Incidents | This alert tells users how many active service incidents their team currently has.<br><br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br><br>When you click the alert, the system displays the One View Incident Summary Inquiry form. |

| Watchlist Alert | Description |
|---|---|
| | The following grid formats are available:<br>• Simple |
| Severe Service Incidents | This alert tells users how many severe service incidents their team currently has.<br>This alert is based on the One View Incident Summary Inquiry program (P54HS220).<br>When you click the alert, the system displays the One View Incident Summary Inquiry form.<br>The following grid formats are available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see: *One View Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide .*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Organization Safety page:

| Component Title | Description |
|---|---|
| Incident Attributes (P54HS22X/ W54HS22XD) | Use this chart to view the total number of incidents for your team.<br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Actual Cost by Month (P54HS22X/ W54HS22XB) | Use this chart to view the cost by month of the incidents for your team.<br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |
| Incidents by Month (P54HS22X/ W54HS22XA) | Use this chart to view the number of incidents for your team by month.<br>This chart is based on the One View Incident Summary Inquiry program (P54HS220). |

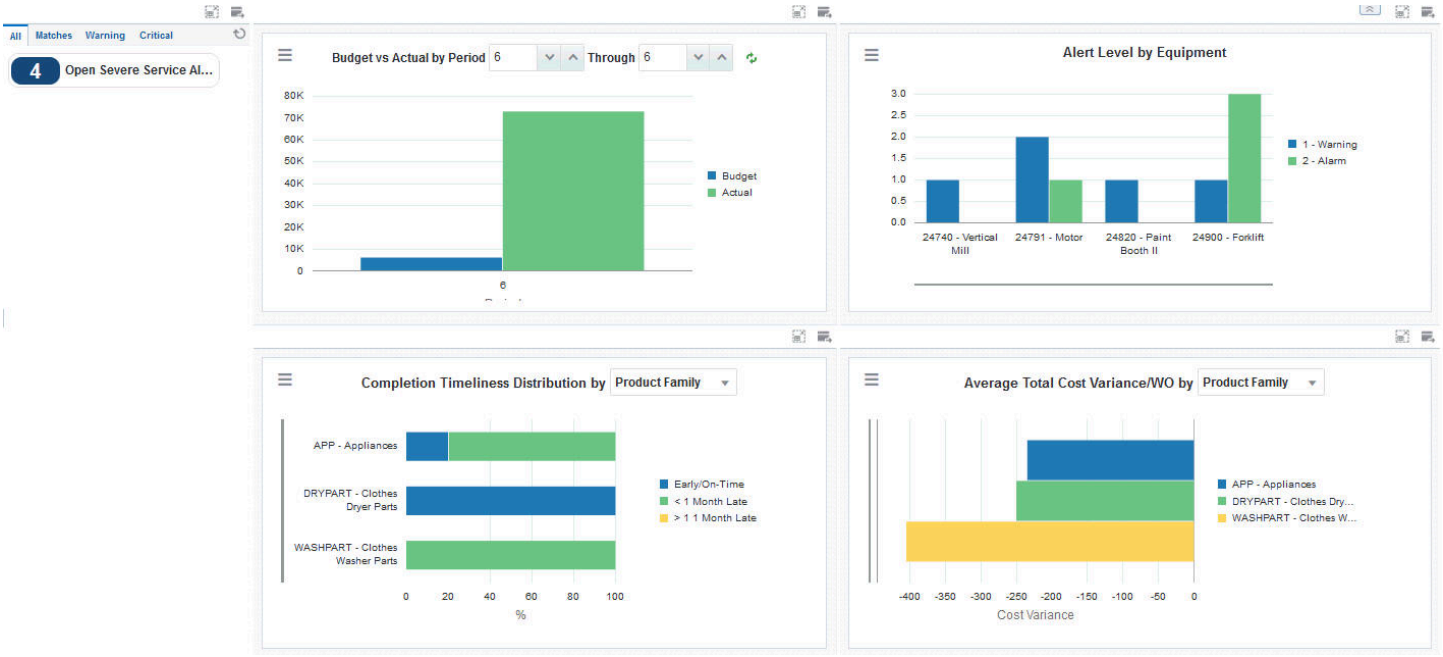
For additional information about the programs associated with these charts, see *One View Incident Summary Inquiry (P54HS220)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

# UX One: Field Service Activities Page

The Field Service Activities page (P17004X/W17004XC) enables users to receive alerts when there are severe service alerts for their team. The page also provides analytical data about the costs, completion timeliness, and alert levels associated with the team.

To access the UX One Field Service Activities page, log in to the EnterpriseOne system using the Service Operations Manager role. When you log in with this role, the system automatically displays the Service Operations Manager page. Click the Field Service Activities task on the springboard to access the Field Service Activities page.

This graphic illustrates the Field Service Activities page:




### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Field Service Activities page:

| Watchlist Alert | Description |
|---|---|
| Open Severe Service Alerts | This alert tells users how many open severe service alerts their team currently has.<br><br>This alert is based on the Condition-Based Alerts Workbench program (P1310). |

| Watchlist Alert | Description |
|---|---|
| | When you click the alert, the system displays the Work With Condition-Based Alerts form. |

For additional information about the programs associated with these watchlist alerts, see: *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Field Service Activities page:

| Component Title | Description |
|---|---|
| Budget vs Actual by Period (P09217X/W09217XB) | Use this chart to view budget amounts versus actual amounts by period for your team.<br><br>This chart is based on the One View Account Balance Inquiry program (P09217). You can use the fields at the top of the chart to specify which periods to include in the chart. |
| Alert Level by Equipment (P1310X/W1310XA) | Use this chart to view the alert level for each piece of equipment.<br><br>This chart is based on the Condition-Based Alerts Workbench program (P1310). |
| Completion Timeliness Distribution by (P13560X/W13560XM) | Use this chart to view work order completion statistics for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To<br>• Contract<br>• Customer<br>• Lead Craft<br>• Product Family<br>• Product Model<br>• Site<br>• Supervisor |
| Average Total Cost Variance/WO by (P13560X/W13560XN) | Use this chart to view the cost variance for each site for your team.<br><br>This chart is based on the One View Service Work Order Analysis Inquiry program (P13560).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Assigned To |

| Component Title | Description |
| --- | --- |
| | • Contract<br>• Customer<br>• Product Family<br>• Product Model<br>• Site |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*:

- *One View Account Balance Inquiry (P09217)*
- *One View Work Order Analysis (P13560)*

Additionally, see *Working with Condition-Based Alerts* in the *JD Edwards EnterpriseOne Applications Condition-Based Maintenance Implementation Guide* .

# UX One: Service Cases Page

The Service Cases page (P17004X/W17004XA) enables users to receive alerts when cases associated with their team are escalated. The page also provides analytical data associated with case aging, commitments, and escalations.

To access the UX One Service Cases page, log in to the EnterpriseOne system using the Service Operations Manager role. When you log in with this role, the system automatically displays the Service Operations Manager page. Click the Service Cases task on the springboard to access the Service Cases page.

This graphic illustrates the Service Cases page:

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Service Cases page:

| Watchlist Alert | Description |
|---|---|
| Escalated Cases | This alert tells users how many escalated cases their team currently has.<br><br>This alert is based on the Case Entry program (P17500).<br><br>When you click the alert, the system displays the Work With Case Management form. |

For additional information about the programs associated with these watchlist alerts, see *Entering Cases* in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide*

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Service Cases page:

| Component Title | Description |
|---|---|
| Case Age Distribution by Assignee (P90CG53X/W90CG53XN) | Use this chart to view the aging distribution of cases on your team by assignee.<br><br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Closed Cases Commitment Results (P90CG53X/W90CG53XF) | Use this chart to view the commitment results for your team's closed cases.<br><br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Case Escalations - All Cases (P90CG53X/W90CG53XM) | Use this chart to view the percentage of current cases that are escalated.<br><br>This chart is based on the One View Case Management Inquiry program (P90CG530). |
| Top 10 Customers with Most Escalated Cases (P90CG53X/W90CG53XC) | Use this chart to view the 10 customers that have the most escalated cases.<br><br>This chart is based on the One View Case Management Inquiry program (P90CG530). |

For additional information about the programs associated with these charts, see *One View Case Management Inquiry (P90CG530)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide .*

# 60 Transportation Management Roles: Shipping Supervisor

## Understanding the Shipping Supervisor UX One Role

The Shipping Supervisor role, and the associated UX One page and components, enable users to quickly and easily access the information that they need to improve transportation planning.

The Shipping Supervisor pages enable users to receive important alerts, analyze data, and act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Shipping Supervisor role (TMSUPJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the TMSUPJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log into the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Shipping Supervisor role, you should have a complete understanding of the components and applications that are accessible form the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide* .

# Using the Shipping Supervisor UX One Role

You use the Shipping Supervisor role to access these UX One pages:

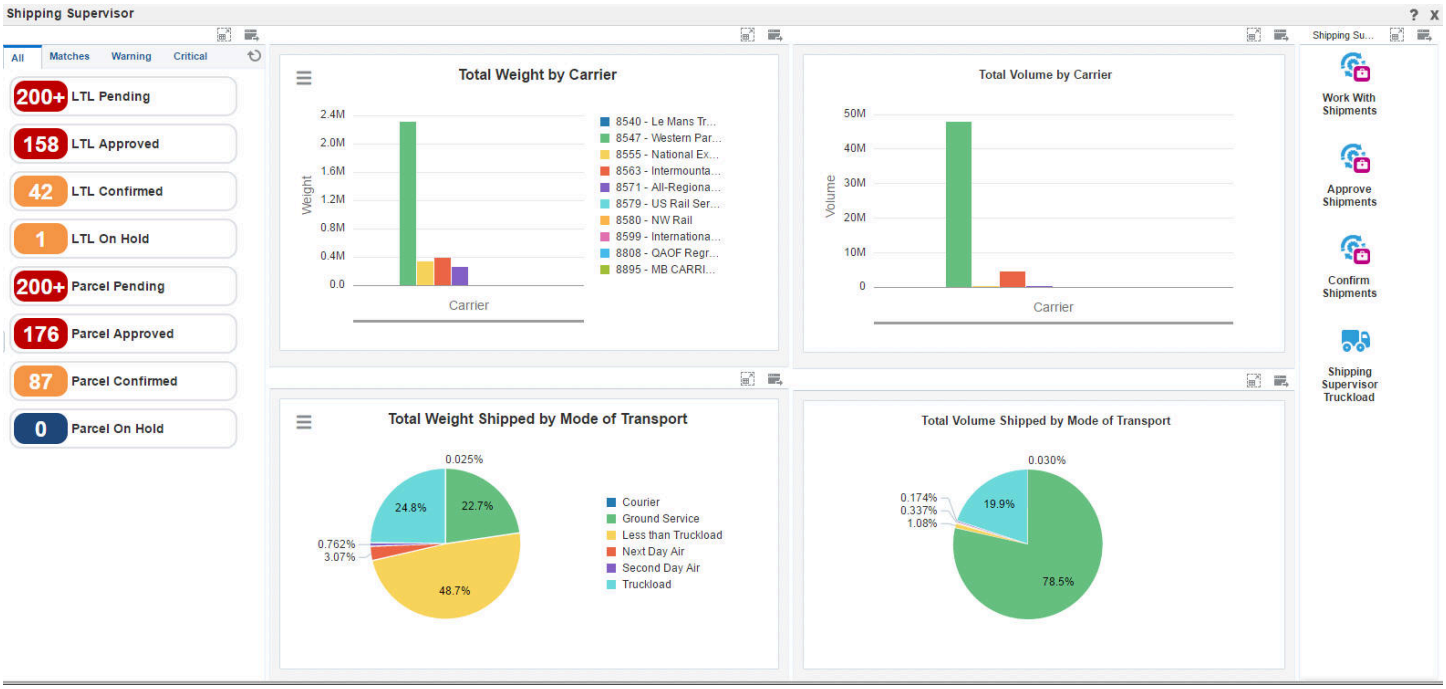
- Shipping Supervisor (P49001X/W49001XA)
- Shipping Supervisor Truckload (P49001X/W49001XB)

## UX One: Shipping Supervisor Page

The Shipping Supervisor page (P49001X/W49001XA) enables users to improve transportation planning by getting a clear visibility to carriers and shipment volumes. This page enables users to view alerts for shipments by mode of transport, provides visibility to carrier activity and impact on the transportation planning program, and provides easy access to shipment and load details.

To access the UX One Shipping Supervisor page, log in to the EnterpriseOne system using the Shipping Supervisor role.

This graphic illustrates the UX One Shipping Supervisor page:




### Watchlist Alerts

These alerts are based on EnterpriseOne program. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query, or call a different program version, you can modify these queries or create new queries that better meet your requirements.

Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the alerts that are available on the Shipping Supervisor page:

| Watchlist Alerts | Description |
|---|---|
| LTL Pending | This alert tells users the number of less-than-truckload shipments that are pending.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br><br>• Shipping Supervisor<br>The following grid formats are available:<br><br>• Shipping Supervisor |
| LTL Approved | This alert tells users the number of less-than-truckload shipments that are approved.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br><br>• Shipping Supervisor<br>The following grid formats are available:<br><br>• Shipping Supervisor |
| LTL Confirmed | This alert tells users the number of less-than-truckload shipments that are confirmed.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br><br>• Shipping Supervisor<br>The following grid formats are available:<br><br>• Shipping Supervisor |
| LTL On Hold | This alert tells users the number of less-than-truckload shipments that are on hold.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br><br>• Shipping Supervisor<br>The following grid formats are available:<br><br>• Shipping Supervisor |
| Parcel Pending | This alert tells users the number of parcel shipments that are pending.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available: |

| Watchlist Alerts | Description |
|---|---|
| | • Shipping Supervisor<br>The following grid formats are available:<br>• Shipping Supervisor |
| Parcel Approved | This alert tells users the number of parcel shipments that are approved.<br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br>• Shipping Supervisor<br>The following grid formats are available:<br>• Shipping Supervisor |
| Parcel Confirmed | This alert tells users the number of parcel shipments that are confirmed.<br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br>• Shipping Supervisor<br>The following grid formats are available:<br>• Shipping Supervisor |
| Parcel On Hold | This alert tells users the number of parcel shipments that are on hold.<br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br>• Shipping Supervisor<br>The following grid formats are available:<br>• Shipping Supervisor |

**Note:** LTL shipment is defined as shipment that weighs more than 99 pounds and less than 10,000 pounds. Parcel shipment is defined as a shipment that weighs less than 100 pounds.

For additional information about the programs associated with these watchlist alerts, see *One View Transportation Shipment Inquiry (P49270)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Shipping Supervisor page:

| Chart | Description |
|---|---|
| Total Weight By Carrier (P4915X/W4915XA) | Use this chart to view the total weight shipped by carrier.<br>This chart is based on the Shipment Routing Steps All Fields business view (V4941A). |
| Total Volume By Carrier (P4915X/W4915XB) | Use this chart to view the total volume shipped by carrier.<br>This chart is based on the Shipment Routing Steps All Fields business view (V4941A). |
| Total Weight Shipped by Mode of Transport (P4915X/W4915XC) | Use this chart to view the total weight shipped by mode of transport.<br>This chart is based on the Shipment Routing Steps All Fields business view (V4941A). |
| Total Volume Shipped by Mode of Transport (P4915X/W4915XD) | Use this chart to view the total volume shipped by mode of transport.<br>This chart is based on the Shipment Routing Steps All Fields business view (V4941A). |

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Shipping Supervisor page:

| Task | Description |
|---|---|
| Work With Shipments | Use this task to access the Work With Shipments program (P4915, version ZJDE0001). |
| Approve Shipments | Use this task to access the Work With Shipments program (P4915, version ZJDE0002). |
| Confirm Shipments | Use this task to access the Work With Shipments program (P4915, version ZJDE0003). |
| Shipping Supervisor Truckload | Use this task to access the Shipping Supervisor Truckload page (P49001X/W49001XB). |

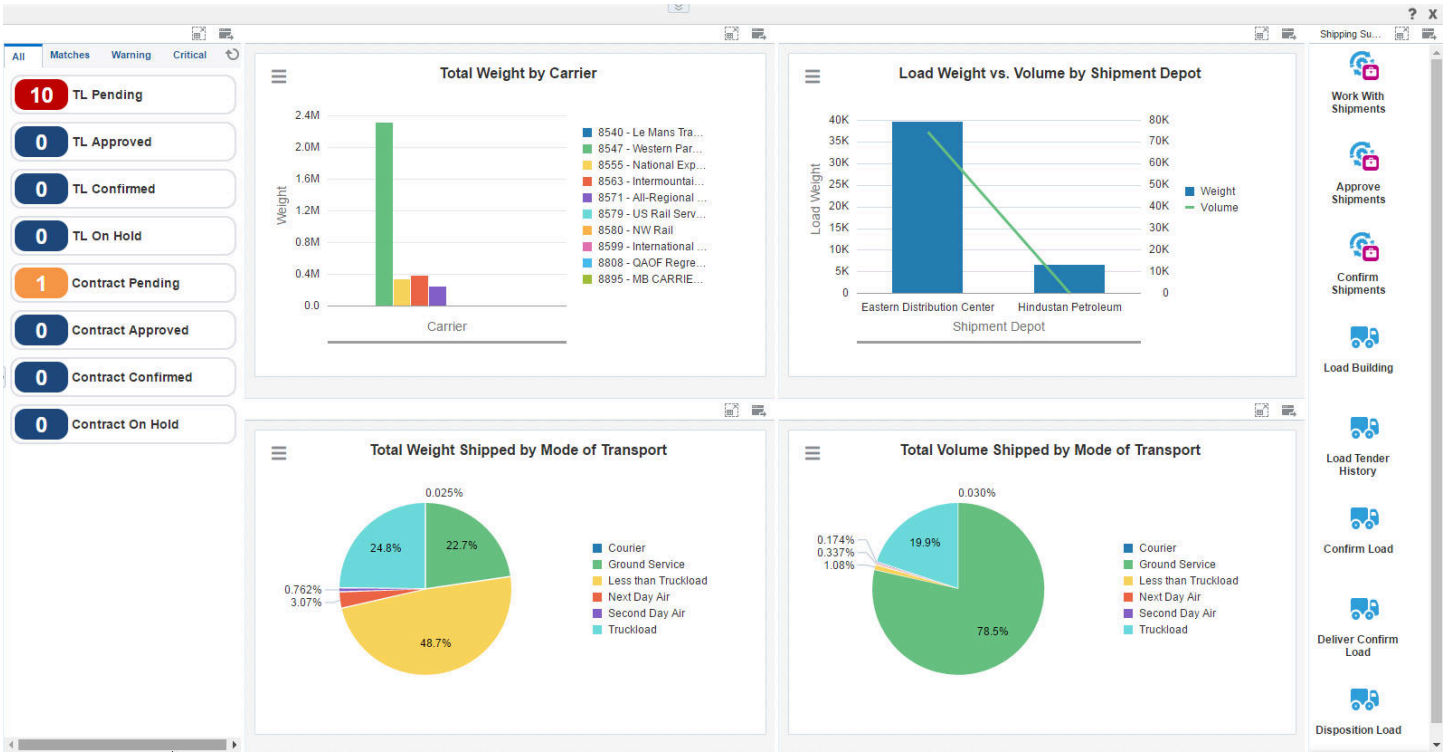
For additional information about the program accessed by these tasks, see *Planning Transportation* in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide* .

# UX One: Shipping Supervisor Truckload Page

The Shipping Supervisor Truckload page (P49001X/W49001XB) enables users to improve truckload planning by getting a clear visibility into truckload carriers and shipment volumes. This page enables users to view alerts for truckload shipments and contract shipments to determine if those shipments qualify for special pricing because of the weight or destination. This page also provides easy access to shipment and load details.

To access the UX One Shipping Supervisor Truckload page, log in to the EnterpriseOne system using the Shipping Supervisor role. When you log in with this role, the system automatically displays the Shipping Supervisor page. Click the Shipping Supervisor Truckload task on the springboard to access the Shipping Supervisor Truckload page.

This graphic illustrates the UX One Shipping Supervisor Truckload page:


All
Matches
Warning
Critical
10 TL Pending
0 TL Approved
0 TL Confirmed
0 TL On Hold
1 Contract Pending
0 Contract Approved
0 Contract Confirmed
0 Contract On Hold
Total Weight by Carrier
Weight
Carrier
8540 - Le Mans Tra...
8547 - Western Par...
8555 - National Exp...
8563 - Intermountai...
8571 - All-Regional ...
8579 - US Rail Serv...
8580 - NW Rail
8599 - International ...
8808 - QAOF Regre...
8895 - MB CARRIE...
Load Weight vs. Volume by Shipment Depot
Load Weight
Shipment Depot
Eastern Distribution Center
Hindustan Petroleum
Weight
Volume
Total Weight Shipped by Mode of Transport
0.025%
24.8%
22.7%
0.762%
3.07%
48.7%
Courier
Ground Service
Less than Truckload
Next Day Air
Second Day Air
Truckload
Total Volume Shipped by Mode of Transport
0.030%
0.174%
0.337%
1.08%
19.9%
78.5%
Shipping Su...
Work With Shipments
Approve Shipments
Confirm Shipments
Load Building
Load Tender History
Confirm Load
Deliver Confirm Load
Disposition Load

### Watchlist Alerts

These alerts are based on EnterpriseOne program. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query, or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the alerts that are available on the Shipping Supervisor Truckload page:

| Watchlist Alerts | Description |
|---|---|
| TL Pending | This alert tells users the number of truckload shipments that are pending.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br><br>• Shipping Supervisor<br>The following grid formats are available:<br><br>• Shipping Supervisor |
| TL Approved | This alert tells users the number of truckload shipments that are approved.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br><br>• Shipping Supervisor<br>The following grid formats are available:<br><br>• Shipping Supervisor |
| TL Confirmed | This alert tells users the number of truckload shipments that are confirmed.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br><br>• Shipping Supervisor<br>The following grid formats are available:<br><br>• Shipping Supervisor |
| TL On Hold | This alert tells users the number of truckload shipments that are on hold.<br><br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br><br>• Shipping Supervisor<br>The following grid formats are available:<br><br>• Shipping Supervisor |
| Contract Pending | This alert tells users the number of contract shipments that are pending. |

| Watchlist Alerts | Description |
|---|---|
| | This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br>• Shipping Supervisor<br>The following grid formats are available:<br>• Shipping Supervisor |
| Contract Approved | This alert tells users the number of contract shipments that are approved.<br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br>• Shipping Supervisor<br>The following grid formats are available:<br>• Shipping Supervisor |
| Contract Confirmed | This alert tells users the number of contract shipments that are confirmed.<br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br>• Shipping Supervisor<br>The following grid formats are available:<br>• Shipping Supervisor |
| Contract On Hold | This alert tells users the number of contract shipments that are on hold.<br>This alert is base don the One View Transportation Shipment Inquiry program (P49720). When you click the alert, the system displays the One View Transportation Inquiry form. The following form layouts are available:<br>• Shipping Supervisor<br>The following grid formats are available:<br>• Shipping Supervisor |

**Note:**

A truckload shipment is defined as shipment that weighs 15,000 pounds or more.

A contract shipment is defined as a shipment that weighs 10,000 pounds or more but less than 15,000 points.

Contract shipments might require a shipping supervisor to contact carriers to inquire about special contract pricing that might be available. Some carriers offer a one-time contract price for shipments that weigh between 10,000 and 15,000 pounds.

For additional information about the programs associated with these watchlist alerts, see *One View Transportation Shipment Inquiry (P49270)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Shipping Supervisor Truckload page:

| Chart | Description |
|---|---|
| Total Weight By Carrier (P4915X/W4915XA) | Use this chart to view the total weight shipped by carrier.<br><br>This chart is based on the Shipment Routing Steps All Fields business view (V4941A). |
| Load Weight vs. Volume by Shipment Depot (P49271X/W49271XA) | Use this chart to view the load bulk weight and volume by shipping depot.<br><br>This chart is based on the One View Transportation Load Inquiry program (P49271). |
| Total Weight Shipped by Mode of Transport (P4915X/W4915XC) | Use this chart to view the total weight shipped by mode of transport.<br><br>This chart is based on the Shipment Routing Steps All Fields business view (V4941A). |
| Total Volume Shipped by Mode of Transport (P4915X/W4915XD) | Use this chart to view the total volume shipped by mode of transport.<br><br>This chart is based on the Shipment Routing Steps All Fields business view (V4941A). |

For additional information about the programs associated with these components, see:

- *Planning Transportation* in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide*
- *One View Transportation Load Inquiry (P49271)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Shipping Supervisor Truckload page:

| Task | Description |
|---|---|
| Work With Shipments | Use this task to access the Work With Shipments program (P4915, version ZJDE0001). |
| Approve Shipments | Use this task to access the Work With Shipments program (P4915, version ZJDE0002). |
| Confirm Shipments | Use this task to access the Work With Shipments program (P4915, version ZJDE0003). |

| Task | Description |
|---|---|
| | |
| Load Building | Use this task to access the Work With Loads program (P4960, version ZJDE0001). |
| Load Tender History | Use this task to access the Load Tender History program (P4918, version ZJDE0001). |
| Confirm Load | Use this task to access the Work With Loads program (P4960, version ZJDE0002). |
| Deliver Confirmed Load | Use this task to access the Work With Loads program (P4960, version ZJDE0003). |
| Disposition Load | Use this task to access the Work With Loads program (P4960, version ZJDE0004). |

For additional information about the program accessed by these tasks, see *Planning Transportation* in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide* .

# 61 Transportation Management Roles: Transportation Manager

## Understanding the Transportation Manager UX One Role

The Transportation Manager role, and the associated UX One pages and components, enable managers to receive important alerts regarding shipments with excessive freight charges, review analytic data regarding freight cost and carrier to plan strategic transportation, and quickly and easily act on the information they see.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Transportation Manager role (TMMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the TMMGRJDE role.

After this setup is complete, the users who log in with this role will automatically see the page for their role when they log in to the JD Edwards EnterpriseOne system.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Transportation Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Transportation Management.*

# Using the Transportation Manager UX One Role

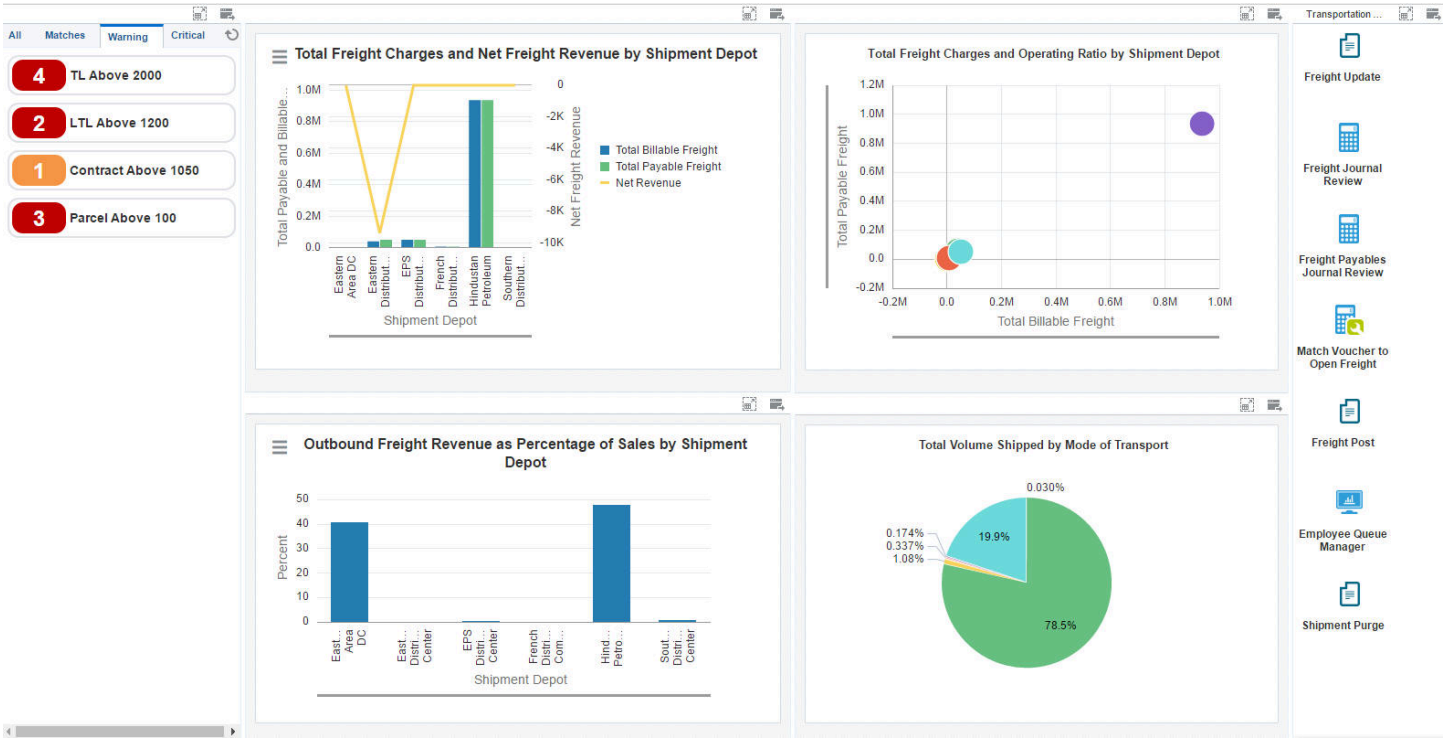
You use the Transportation Manager role to access the UX One Transportation Manager page (P49002X/W49002XA).

## UX One: Transportation Manager Page

The Transportation Manager page (P49002X/W49002XA) enables users to:

- Receive alerts associated with shipments that have excessive freight charges.
- Analyze data that impact the transportation program.
- Access programs to quickly and easily act on the information that is displayed on the page.

To access the UX One Transportation Manager page, log in to the EnterpriseOne system using the Transportation Manager role.




## Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Transportation Manager page:

| Watchlist Alert | Description |
|---|---|
| TL Above 2000 | This alert tells users the number of truckload shipments that cost more than $2,000 USD.<br>This alert is based on the One View Transportation Shipment Inquiry program (P49270).<br>When you click the alert, the system displays the One View Transportation Shipment Inquiry form. |
| LTL Above 1200 | This alert tells users the number of less-than-truckload shipments that costs more than $1,200 USD.<br>This alert is based on the One View Transportation Shipment Inquiry program (P49270).<br>When you click the alert, the system displays the One View Transportation Shipment Inquiry form. |
| Contract Above 1050 | This alert tells users the number of potential contract shipments that cost more than $1,050 USD.<br>This alert is based on the One View Transportation Shipment Inquiry program (P49270).<br>When you click the alert, the system displays the One View Transportation Shipment Inquiry form. |
| Parcel Above 100 | This alert tells users the number of parcel shipments that cost more than $100 USD.<br>This alert is based on the One View Transportation Shipment Inquiry program (P49270).<br>When you click the alert, the system displays the One View Transportation Shipment Inquiry form. |

For additional information about the programs associated with these watchlist alerts, see *One View Reporting for Transportation Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are set up to render using queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Transportation Manager page:

| Component Title | Description |
|---|---|
| Total Freight Charges and Net Revenue by Shipment Depot<br><br>(P49270X/W49270XA) | Use this chart to view the comparison of the payable freight charges to the billable freight charges by shipment depot to analyze the gain or loss in revenue. The net revenue is equal to the difference between the payable freight charges and the billable freight charges.<br>This chart is based on the One View Transportation Shipment Inquiry program (P49270). |

| Component Title | Description |
|---|---|
| Total Freight Charges and Operating Ratio by Shipment Depot<br><br>(P49270X/W49270XB) | Use this chart to view the comparison of payable freight charges and billable freight charges to determine an operating ratio by shipment depot. The operating ratio is equal to payable freight charges/billable freight charges.<br><br>This chart is based on the One View Transportation Shipment Inquiry program (P49270). |
| Outbound Freight Revenue as Percentage of Sales by Shipment Depot<br><br>(P49270X/W49270XE) | Use this chart to view the outbound freight revenue with respect to the total sales.<br><br>This chart is based on the One View Transportation Shipment Inquiry program (P49270). |
| Total Volume Shipped by Mode of Transport (P4915X/W4915XD) | Use this chart to view the total volume shipped based on the mode of transport.<br><br>This chart is based on the Shipment Routing Steps All Fields business view (V4941A). |

For additional information about the programs associated with these charts, see these topics:

- *One View Reporting for Transportation Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .
- *Tracking Shipments* in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide* .

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Transportation Manager page:

| Task | Description |
|---|---|
| Freight Update | Use this task to access the Freight Update and Report program (R4981, version ZJDE0001). |
| Freight Journal Review | Use this task to access the Freight Journal Review - Work with Batches program (P0011, version ZJDE0001). |
| Freight Payables | Use this task to access the Journal Review-Work with Batches program (P0411, version ZJDE0001). |
| Match Voucher to Open Freight | Use this task to access the Supplier Ledger Inquiry program (P0411, version ZJDE0001). |
| Freight Post | Use this task to access the General Ledger Post Batch program (R09801, version ZJDE0001). |
| Employee Queue Manager | Use this task to access the Employee Queue Manager - Work Center program (P012503, version ZJDE0002). |
| Shipment Purge | Use this task to access the Batch Versions program (R4915P, version ZJDE0001). |

For additional information about the programs accessed by these tasks, see these topics:

- *Updating Freight* in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide* .

# 62 Transportation Management Roles: Additional UX One Components for Transportation Management

## Additional UX One Components for Transportation Management

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own UX One page or customizing existing pages.

**Charts**

These charts are based on EnterpriseOne programs and business views. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries may be associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

You can access these charts using Fast Path, by entering the program ID and form ID. For example, enter P1234X|W1234XA in the Fast Path field.

This table lists and describes the charts that are available for Transportation Management:

| Component Title | Description |
|---|---|
| Freight Charge Operating Ratio by Shipment Depot (P49270X/W49270XC) | Use this chart to view the freight charge operating ratio by shipment depot. The operating ratio is equal to payable freight charges divided by billable freight charges.<br><br>This chart is based on the One View Transportation Shipment Inquiry program (P49270). |
| Inbound Freight Cost as Percentage of Purchase by Shipment Depot (P49270X/W49270XD) | Use this chart to view the inbound freight cost with respect to the total purchase cost by shipment depot.<br><br>This chart is based on the One View Transportation Shipment Inquiry program (P49270). |
| Number of Shipments vs. Weight (P4915X/W4915XE) | Use this chart to view the number of shipments versus the weight of shipments.<br><br>This chart is based on the One View Transportation Shipment Inquiry program (P49270). |

For additional information about the programs associated with these components, see:

- *One View Reporting for Transportation Management* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Tracking Shipments* in the *JD Edwards EnterpriseOne Applications Transportation Management Implementation Guide*

# 63 Warehouse Management Roles: Warehouse Manager

## Understanding the Warehouse Manager UX One Role

The Warehouse Manager role, and the associated UX One pages and components, enable managers to:

- Receive important alerts regarding types of warehouse requests.
- Analyze warehouse movement efficiency.
- Easily access various warehouse inquiry programs.

> **Note:**
>
> The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered.
>
> You can use these role, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization.
>
> See *Understanding UX One Roles*.

## Prerequisites

Before using the Warehouse Manager role (WMSMGRJDE), and the components listed in this documentation, your system administrator must complete the steps to associate the user ID with the WMSMGRJDE role.

After this setup is complete, the users will automatically see the main page for their role when they log in to the JD Edwards EnterpriseOne system for the first time.

See *Setting Up a Role Relationship* in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

### Prerequisite Reading

Before using the Warehouse Manager role, you should have a complete understanding of the components and applications that are accessible from the pages. Additional, essential information is provided in the *JD Edwards EnterpriseOne Applications Warehouse Management Implementation Guide* . See *Introduction to JD Edwards EnterpriseOne Warehouse Management.*

# Using the Warehouse Manager UX One Role

You use the Warehouse Manager role to access the Warehouse Manager page (P46001X/W46001XA).

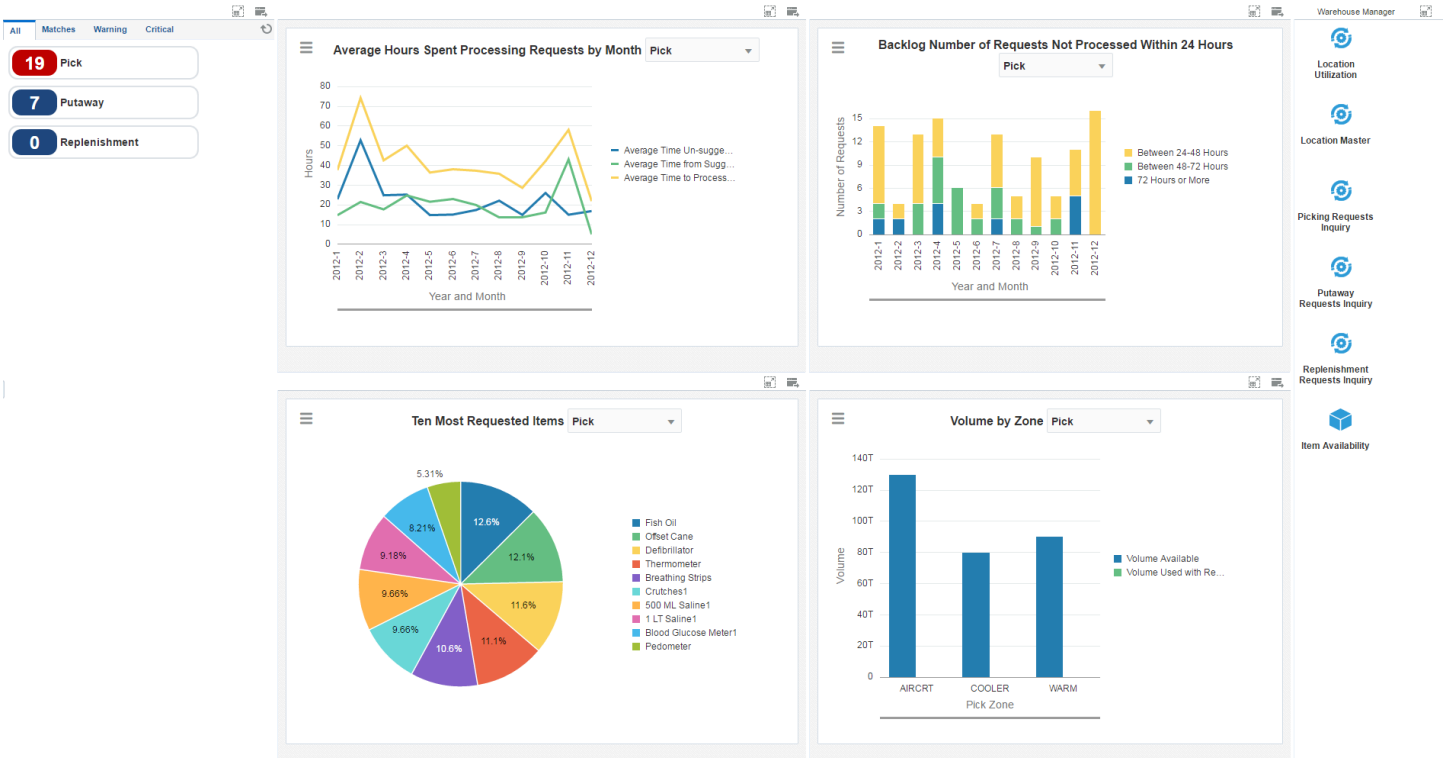
## UX One: Warehouse Manager Page

The Warehouse Manager page enables users to:

- Receive alerts associated with the number of requests that are not processed.
- Analyze the time required in processing requests and volume consumed, and review the location used in warehouse.
- Act quickly by easily accessing the warehouse management programs.

To access the UX One Warehouse Manager page, log in to the EnterpriseOne system using the Warehouse Manager role.

This graphic illustrates the Warehouse Manager page:


All
Matches
Warning
Critical
19
Pick
7
Putaway
0
Replenishment
Average Hours Spent Processing Requests by Month
Pick
Hours
Year and Month
Average Time Un-sugge...
Average Time from Sugg...
Average Time to Process...
Backlog Number of Requests Not Processed Within 24 Hours
Pick
Number of Requests
Year and Month
Between 24-48 Hours
Between 48-72 Hours
72 Hours or More
Warehouse Manager
Location Utilization
Location Master
Picking Requests Inquiry
Putaway Requests Inquiry
Replenishment Requests Inquiry
Item Availability
Ten Most Requested Items
Pick
12.6%
12.1%
11.6%
11.1%
10.6%
9.66%
9.66%
9.18%
8.21%
5.31%
Fish Oil
Offset Cane
Defibrillator
Thermometer
Breathing Strips
Crutches1
500 ML Saline1
1 LT Saline1
Blood Glucose Meter1
Pedometer
Volume by Zone
Pick
Volume
Pick Zone
AIRCRT
COOLER
WARM
Volume Available
Volume Used with Re...

### Watchlist Alerts

These alerts are based on EnterpriseOne programs. By default, the alerts are set up to use queries that are based on delivered demo data. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. Additionally, these watchlists have been set up with specific warning and critical threshold values. You can adjust these values to meet your requirements.

This table lists and describes the watchlist alerts that are available on the Warehouse Manager page:

| Watchlist Alert | Description |
|---|---|
| Pick | This alert tells users about the number of pick requests that are not processed.<br>This alert is based on the One View Warehouse Request Inquiry program (P46270, version ZJDE002).<br>When you click the alert, the system displays the One View Warehouse Request Inquiry form. The following form layout is available:<br>• Request Availability<br>The following grid format is available:<br>• Simple |
| Putaway | This alert tells users about the number of putaway requests that are not processed.<br>This alert is based on the One View Warehouse Request Inquiry program (P46270, version ZJDE003).<br>When you click the alert, the system displays the One View Warehouse Request Inquiry form. The following form layout is available:<br>• Request Availability<br>The following grid format is available:<br>• Simple |
| Replenishment | This alert tells users about the number of replenishment requests that are not processed.<br>This alert is based on the One View Warehouse Request Inquiry program (P46270, version ZJDE004).<br>When you click the alert, the system displays the One View Warehouse Request Inquiry form. The following form layout is available:<br>• Request Availability<br>The following grid format is available:<br>• Simple |

For additional information about the programs associated with these watchlist alerts, see *One View Warehouse Request Inquiry (P46270)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

### Charts

These charts are based on EnterpriseOne programs. By default, the charts are rendered using the delivered queries that are listed below. Each of these queries is associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available on the Warehouse Manager page:

| Component Title | Description |
|---|---|
| Average Hours Spent Processing Requests by Month (P46270X/W46270XC) | Use this chart to compare the number of hours spent each month to process requests for the selected branch/plant. The requests are categorized by averaged time unsuggested, average time from suggestion to confirmation, and average time to process the entire request.<br><br>This chart is based on the One View Warehouse Request Inquiry program (P46270).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Pick<br>• Putaway<br>• Replenishment |
| Backlog - Number of Requests Not Processed Within 24 Hours (P46270X/W46270XB) | Use this chart to review the number of requests that are not processed within 24 hours for the selected branch/plant. The bar graph displays information by month and categorizes the 24–hour periods as between 24–48 hours, between 48–72 hours, and 72 hours or more.<br><br>When you hover over a bar within the chart, it displays a value that is calculated as the percentage of number of requests not processes/total number of requests not processed.<br><br>This chart is based on the One View Warehouse Request Inquiry program (P46270).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Pick<br>• Putaway<br>• Replenishment |
| Ten Most Requested Items (P46270X/W46270XA) | Use this chart to view the 10 most requested items during a specific period.<br><br>This chart is based on the One View Warehouse Request Inquiry program (P46270).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Pick<br>• Putaway<br>• Replenishment |
| Volume by Zone (P46273X/W46273XA) | Use this chart to review and compare the available and used volume in each of the respective zones in your warehouse.<br><br>This chart is based on the One View Warehouse Location Inquiry program (P46273).<br><br>**Note:** The branch/plant used in the query must be same as that set in the Work With Default Location and Printers program (P400951).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Pick |

| Component Title | Description |
|---|---|
| | • Putaway<br>• Replenishment |

For additional information about the programs associated with these charts, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide:*

- *One View Warehouse Request Inquiry (P46270)*
- *One View Warehouse Location Inquiry (P46273)*

### Springboard Tasks

You use tasks to access EnterpriseOne programs and other UX One pages. These tasks are included in a springboard on the page.

This table lists and describes the tasks on the Warehouse Manager page:

| Task | Description |
|---|---|
| Location Utilization | Use this task to access the Location Utilization - Work with Location Utilization program (P46220). |
| Location Master | Use this task to access the Location Master - Work with Location Master program (P4100). |
| Putaway Requests | Use this task to access the Putaway Requests Inquiry - Putaway Request Inquiry program (P4600, version ZJDE0002). |
| Pick Request Inquiry | Use this task to access the Picking Requests Inquiry - Picking Request Inquiry program (P4600, version ZJDE001). |
| Replenishment Inquiry | Use this task to access the Replenishment Requests Inquiry - Replenishment Requests Inquiry program (P4600, version ZJDE0003). |
| Item Availability | Use this task to access the Item Availability - Work with Item Availability program (P41202). |

For additional information about the programs accessed by these tasks, see:

- *One View Warehouse Suggestion Inquiry (P46271)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *One View Warehouse Location Inquiry (P46273)* in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*
- *Working with Putaway Requests* in the *JD Edwards EnterpriseOne Applications Warehouse Management Implementation Guide*
- *Working with Picking* in the *JD Edwards EnterpriseOne Applications Warehouse Management Implementation Guide*
- *Working with Replenishment* in the *JD Edwards EnterpriseOne Applications Warehouse Management Implementation Guide*

# 64 Warehouse Management Roles: Additional UX One Components for Warehouse Manager

## Additional UX One Components for Warehouse Manager

In addition to the components that are available on the UX One pages discussed in this documentation, additional components are available for use if you are creating your own UX One page or customizing existing pages.

**Charts**

These charts are based on EnterpriseOne programs and business views. By default, the charts are set up to render using queries that are based on delivered demo data. Some of these queries may be associated with a specific program version. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements.

This table lists and describes the charts that are available for Warehouse Manager:

| Component Title | Description |
|---|---|
| Percentage of Volume Consumed in the Warehouse (P46273X/W46273XB) | Use this chart to review the percentage of volume consumed against the available volume in the warehouse. This includes reservations.<br><br>This chart is based on the One View Warehouse Location Inquiry program (P46273).<br><br>**Note:** The branch/plant used in the query must be same as that set in the Work With Default Location and Printers program (P400951).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Location<br><br>Use this chart to review the percentage of locations that contain inventory against those that do not contain inventory in the warehouse. |
| Ten Least Requested Items for Picking (P46270X/W46270XD) | Use this chart to view the 10 least requested items for picking during a specific time period.<br><br>This chart is based on the One View Warehouse Request Inquiry program (P46270).<br><br>Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of these options:<br><br>• Putaway<br><br>This chart enables you to view the 10 least requested items for putaway during a specific time period. |

| Component Title | Description |
| --- | --- |
| | • Replenishment<br><br>This chart enables you to view the 10 least requested items for replenishment during a specific time period. |

For additional information about the programs associated with these components, see these topics in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* .

- *One View Warehouse Request Inquiry (P46270)*
- *One View Warehouse Location Inquiry (P46273)*

# 65 System Administrator Roles: System Administrator

## System Administrator Roles: System Administrator (Release 9.2 Update 6)

The System Administrator role and the associated UX One pages and components enable security administrators to view the login history by:

- Top 10 clients
- Least 10 clients
- Top 10 users
- Environment
- Role
- Day
- Month
- Top 10 failed login attempts

**Note:** The information provided for you in this documentation describes a specific UX One role, and the associated pages and components, that were delivered. You can use these roles, pages, components, queries, grid formats, and form layouts as they are delivered, or you can modify them to more closely meet the requirements of your organization. See *Understanding UX One Roles*.

## Using the System Administrator UX One Role

You use the System Administrator role to access the Security Activity Tracking UXOne page (P9312X|W9312XA).

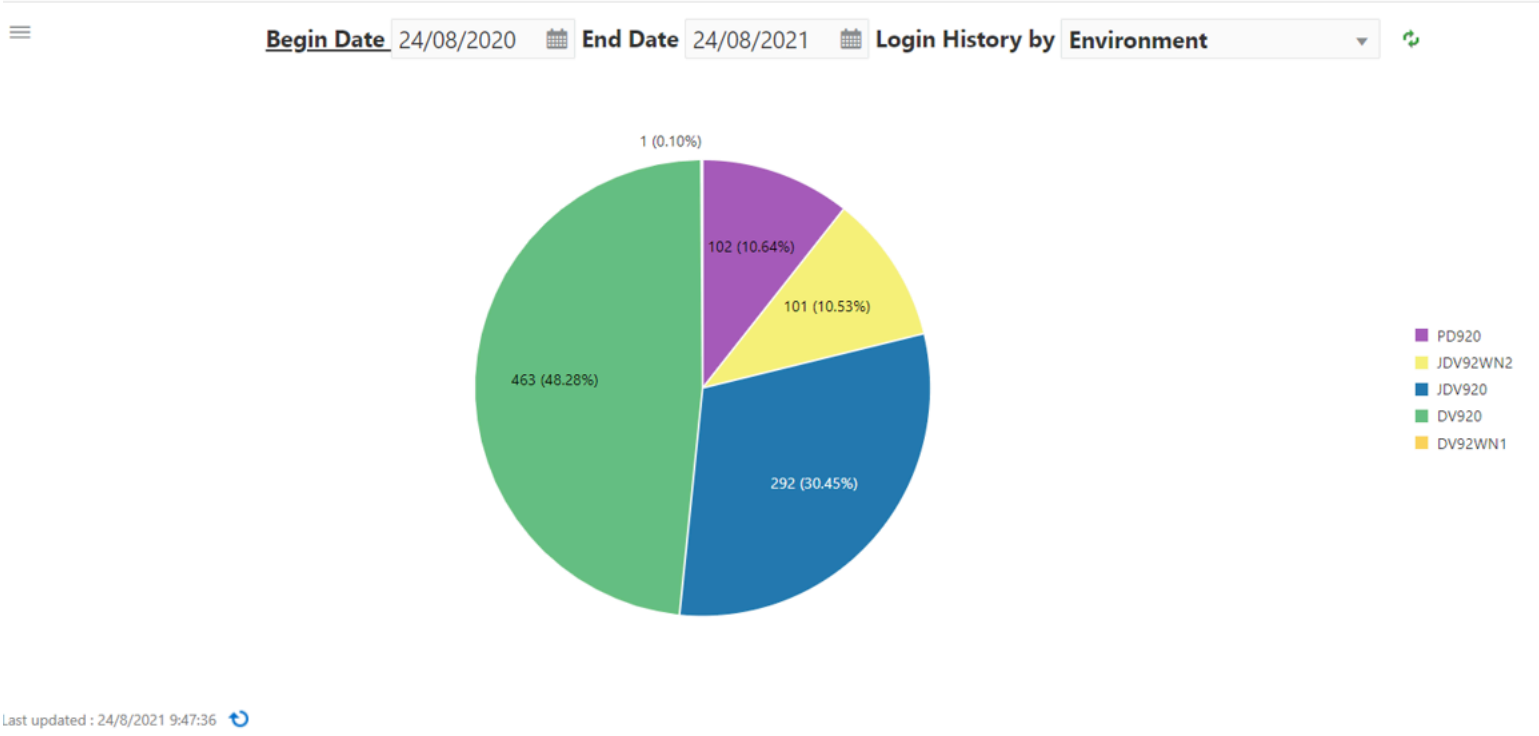
### UX One: Security Activity Tracking Page

The Security Activity Tracking page provides improved audit and troubleshooting capabilities and enables security administrators to:

- Block external access to an application from a particular host name.
- Identify the source of user login (JAS, Deployment Server, or Development Client).
- Track login information by role and environment.

To access the UX Security Activity Tracking page, log in to the EnterpriseOne system by using the Security Administrator role.

This graphic illustrates the Security Activity Tracking page where the login history is filtered by environment:




## Prerequisite

Before you access Security Activity Tracking, you must create a query in the Work With Security History application (P9312|W9312C). To create a new query in Work With Security History:

1. Ente **P9312|W9312C** in the Fast Path to access Work With Security History application.
2. Click **Manage Queries**.
3. Select Set As Default.
4. Expand the Additional Field Selection section.
5. Select Machine Key (QBE) from the list.
6. Under Conditions, select Match Any.
7. Select “is not blank” from the drop-down list for Machine Key (QBE).
8. Click **Save**.
9. Provide a name for the created query and click **OK**.

## Charts

These charts are filtered by login history. By default, the charts are rendered using the delivered queries that are listed below. You can change the begin date and end date of a query as required. To use a different query or call a different program version, you can modify these queries or create new queries that better meet your requirements. The queries can be defined using the application P9312|W9312C (for example, query based on last year, last quarter using the sign in date column, and so on) and can be used derive the UXOne charts.

| Component Title | Description |
|---|---|
| Top 10 clients | Shows the clients that are used the most to access JD Edwards EnterpriseOne. This information helps you to identify if there is any man-in-the-middle attack from any of the machines. You can use this data to block external access. |

| | |
|---|---|
| Least 10 clients | Shows the clients that are rarely used for access. This information can be used for decommissioning the clients if they are no longer needed. |
| Top 10 users | Shows the users who are frequently using the JD Edwards EnterpriseOne application for their daily activities. This data helps you to identify the users with high level of activity and also to flag users who might have abnormal activity on the system. This data also helps you to identify if there is a particular section or sector within the customer business where the activity load is higher than other areas. |
| Environment | Using this information, you can identify the different environments accessed by users and the environments that are most accessed. This information helps in auditing. |
| Role | Using this information, you can identify the different roles and the frequency in which each role is used. |
| Day | Shows how many users were logged into JD Edwards EnterpriseOne on a particular day. This query shows information in a bar chart for the last 24 hours and shows how many sessions were registered through the new security tables. |
| Month | Shows how many users were logged into JD Edwards EnterpriseOne in a particular month. This query shows information in bar chart for the last month and shows how many sessions were registered through the new security tables. |
| Top 10 failed login attempts | Shows the different clients that were frequently trying to access JD Edwards EnterpriseOne and failed. This information helps you to in identify unauthorized access. |

## Customizing the charts

1. Click the Open Menu icon in the Security Activity Tracking UXOne page.
2. Click the **Filter** icon.
3. In the Application Query section, build the query according to your requirements.
4. In the Additional Filters section, add additional form-level and grid-level filters using the filters in the left-side panel.
5. Click the **Apply Filter** button.

# UX One: JDE Usage Tracking Composed EnterpriseOne Page (Release 9.2.8.2)

Tools Release 9.2.8.2 provides you a Composed EnterpriseOne page, JDE Usage Tracking, that lists the below charts and applications that provide visibility into EnterpriseOne usage and user access.

| **Chart / Application** | **Description** |
|---|---|
| Application User Access | Shows user access count by Application Modules in EnterpriseOne. See *User Access by Application Modules* in *Software Updates Guide* for details. |
| Application User Access – Based on Roles | Shows user access count based on user roles in EnterpriseOne. See *Application User Access – Based on Roles* in *Software Updates Guide* for details. |
| Object Usage by Pathcode | Shows object usage totals by path code for a specified number of days. See Object Usage by Path Code |

| | |
|---|---|
| | under *Working with Object Usage Tracking Composed EnterpriseOne Page* in *Software Updates Guide* for details. |
| Object Usage Detail | Shows the tracking data such as object being accessed along with the username, path code, role, product code, object type, etc. See *Working with Object Usage Tracking Detail (P98911)* in *Software Updates Guide* for details. |
| Object Usage by Product Code | Shows object usage totals by Product Code for a specified number of days. See Object Usage by Product Code under *Working with Object Usage Tracking Composed EnterpriseOne Page* in *Software Updates Guide* for details. |
| Object Usage Summary | Displays data from the Object Usage Tracking Summary (F98902) table, which is populated by running the Summarize Object Usage UBE (R98902). See *Working with Object Usage Tracking Summary (P98902)* in *Software Updates Guide* for details. |
| Daily Peak Time Usage | Shows daily object usage by path code. See Daily Peak Time Usage for (Date) Chart under *Working with Object Usage Tracking Composed EnterpriseOne Page* in *Software Updates Guide* for details. |
| Login/Logout History Tracking | Shows user log in activity based on users, clients, roles, environment, day, month and so on. See *UX One: Security Activity Tracking Page* for details. |

# 66 Appendix A - UX One Inquiry Programs (Release 9.2 Update)

## Inquiry Programs for Advanced Pricing

You can access the following programs from the UX One pages for Advanced Pricing:

- Rebate Transaction Summary (P4079)

  You can access the following program from the Row menu:

  - Rebate Volume History Inquiry (P4078)

- Price Adjustments Inquiry (P4080)

  You can access the following programs from the Row menu:

  - Price Adjustment Type (P4071)
  - Price Adjustment Detail Revisions (P4072)

- Price Adjustment Audit Trail Inquiry (P4081)

  You can access the following program from the Row menu:

  - Order Entry (P4310)

- Unused Price Adjustments (P40712)

  You can access the following programs from the Row menu:

  - Price Adjustment Type (P4071)
  - Price Adjustment Detail Revisions (P4072)

## Setting Processing Options for Rebate Transaction Summary (P4079)

Processing options enable you to specify default processing values.

### Defaults

**Date - Effective**
Specify the date on which a transaction, contract, obligation, preference, or policy becomes effective.

# Setting Processing Options for Price Adjustments Inquiry (P4080)

Processing options enable you to specify default processing values.

## Defaults

**Date - Expired**
Specify the date on which a transaction, text message, agreement, obligation, or preference expired or was completed.

# Setting Processing Options for Price Adjustment Audit Trail Inquiry (P4081)

Processing options enable you to specify default processing values.

## Defaults

**Order Type**
Enter a value from UDC 00/DT to specify the order type.

# Inquiry Programs for Agreement Management

You can access the following programs from the UX One pages for Agreement Management:

- Agreement Compliance Inquiry (P38010JB) (Release 9.2 Update)

  You can access the following program from the Row menu:

  - Agreement Master (P38010)
- Agreement Detail Inquiry (P38030)

  You can access the following programs from the Row menu:

  - Agreement Master (P38010)
  - Sales Order Detail Inquiry (P4238)
- Agreement Schedule Inquiry (P38031)

  You can access the following program from the Row menu:

  - Item Availability (P41202)
- Closed Agreements Inquiry (P38032)

  You can access the following programs from the Row menu based on the type of agreement:

    - Sales Order Detail Inquiry (P4238)
    - Purchase Order Detail Inquiry (P4338)

- Sales Order Detail Inquiry (P4238)
- Purchase Order Detail Inquiry (P4338)

# Setting Processing Options for Agreement Detail Inquiry (P38030)

Processing options enable you to specify default processing values.

## Defaults

**Agreement Status**
Enter a value from UDC 38/CU to specify the status of the agreement.

# Setting Processing Options for Agreement Schedule Inquiry (P38031)

Processing options enable you to specify default processing values.

## Defaults

**Source Type**
Specify a code that determines the type of source entered in the Transaction Source field.

# Setting Processing Options for Closed Agreements Inquiry (P38032)

Processing options enable you to specify default processing values.

## Defaults

**Agreement Type**
Enter a value from UDC 38/CV to specify the agreement type.

# Setting Processing Options for Purchase Order Detail Inquiry (P4338)

Processing options enable you to specify default processing values.

### Defaults

**Order Type**

Enter a value from UDC 00/DT to specify the purchase order type.

## Setting Processing Options for Sales Order Detail Inquiry (P4238)

Processing options enable you to specify default processing values.

### Defaults

**Order Type**

Enter a value from UDC 00/DT to specify the sales order type.

# Inquiry Programs for General Accounting

You can access the following programs from the UX One page for General Accounting:

- Unprocessed Bank Statements Inquiry (P09632)

  You can access the following program from the Row menu:

  - Manual Bank Statement Reconciliation (P09631)
- Account Ledger Detail (P09F11)

# Inquiry Programs for Grower Contract Management

You can access the following programs from the UX One pages for Grower Contract Management:

- Advance Payments Inquiry (P40G110)

  You can access the following program from the Row menu:

  - Update Contract Block (P43C10)
- Contract Receipts Inquiry (P40G210)

  You can access the following program from the Row menu:

  - View Weigh Tags (P40G33)
- Contract Header Inquiry (P43C02)

  You can access the following program from the Form menu:

  - Search for Contract Header Update Profiles (P43C010)

You can access the following program from the Row menu:

- Edit Contract Header (P43C01)

- Contract Action Dates Inquiry (P43C050)

  You can access the following program from the Row menu:

  - Edit Contract Header (P43C01)

- Contract Elements Inquiry (P43C120)

  You can access the following program from the Row menu:

  - Update Contract Block (P43C10)

- Contract Details Inquiry (P43C130)

  You can access the following program from the Row menu:

  - Update Contract Block (P43C10)

# Setting Processing Options for Advance Payments Inquiry (P40G110)

Processing options enable you to specify default processing values.

## Defaults

**Business Unit**
Specify the business unit for which you want to track costs.

# Setting Processing Options for Contract Receipts Inquiry (P40G210)

Processing options enable you to specify default processing values.

## Defaults

**Business Unit**
Specify the business unit for which you want to track costs.

# Setting Processing Options for Contract Header Inquiry (P43C02)

Processing options enable you to specify default processing values.

### Defaults

**Business Unit**
Specify the business unit for which you want to track costs.

## Setting Processing Options for Contract Action Dates Inquiry (P43C050)

Processing options enable you to specify default processing values.

### Defaults

**Business Unit**
Specify the business unit for which you want to track costs.

## Setting Processing Options for Contract Elements Inquiry (P43C120)

Processing options enable you to specify default processing values.

### Defaults

**Business Unit**
Specify the business unit for which you want to track costs.

**2nd Item Number**
Specify the second item number of the item you want to track.

## Setting Processing Options for Contract Details Inquiry (P43C130)

Processing options enable you to specify default processing values.

### Defaults

**Business Unit**
Specify the business unit for which you want to track costs.

**2nd Item Number**
Specify the second item number of the item you want to track.

# Inquiry Programs for Inventory Management

You can access the following programs from the UX One pages for Inventory Management:

- Expiring Lots by Item Inquiry (P410212) (Release 9.2 Update)

  You can access the following program from the Row menu:

  - Lot Master (P4108)

- Item Branch Inquiry (P41027)

  You can access the following programs from the Row menu:

  - Work With Preference Base Price (P4106)
  - Work With Item Availability (P41202)

- Item Cost Inquiry (P41052)

  You can access the following program from the Row menu:

  - Work With Item Cost (P4105)

- Item Price Inquiry (P41062)

  You can access the following program from the Row menu:

  - Work With Preference Base Price (P4106)

- Inventory Movement by Month (P4117) (Release 9.2 Update)
- Item Location Inquiry (P41205)

  You can access the following program from the Form menu:

  - Work With Inventory Transfers (P4113)

  You can access the following program from the Row menu:

  - Work With Item Availability (P41202)

## Setting Processing Options for Item Branch Inquiry (P41027)

Processing options enable you to specify default processing values.

### Defaults

**Branch/Plant**
Specify the branch/plant for which you want to track costs.

## Setting Processing Options for Item Cost Inquiry (P41052)

Processing options enable you to specify default processing values.

### Defaults

**Branch/Plant**
Specify the branch/plant for which you want to track costs.

## Setting Processing Options for Item Price Inquiry (P41062)

Processing options enable you to specify default processing values.

### Defaults

**Branch/Plant**
Specify the branch/plant for which you want to track costs.

## Setting Processing Options for Item Location Inquiry (P41205)

Processing options enable you to specify default processing values.

### Defaults

**Branch/Plant**
Specify the branch/plant for which you want to track costs.

# Inquiry Programs for Outbound Inventory Management (Release 9.2 Update)

You can access the following program from the UX One pages for Outbound Inventory Management:

- Outbound Availability (P42I021)

  You can access the following programs from the Row menu:

  - Outbound Inventory Availability (P42I04)
  - Outbound Inventory Agreement Master (P42I010)
  - Outbound Inventory Agreement Details (P42I011)

# Inquiry Programs for Procurement Management

You can access the following programs from the UX One pages for Procurement Management:

- Inquire Requisition Awaiting Approval (P4209)

  You can access the following programs from the Form menu:

  - Order Entry (P4310)
  - Approval Level Revisions (P43008)

  You can access the following programs from the Row menu:

  - Order Entry (P4310)
  - Purchase Order Approvals (P43081)

- Expiring Blanket Orders Inquiry (P4311)

  You can access the following program from the Form menu:

  - Order Entry (P4310)

  You can access the following programs from the Row menu:

  - Blanket Order Release (P43060)
  - Item Availability (P41202)
  - Order Entry (P4310)

- Work With Order Inquiry (P43268)

  You can access the following program from the Form menu:

  - Purchase Receipts Inquiry (P43214)

  You can access the following programs from the Row menu:

  - Order Entry (P4310)
  - Supplier Master (P04012)
  - Item Master (P4101)

- Quote Order Inquiry (P43301) (Release 9.2 Update)

  You can access the following programs from the Row menu:

  - Supplier Master (P04012)
  - Item Master (P4101)
  - Order Entry (P4310)

- Outbound EDI Orders Inquiry (P47017)

  You can access the following programs from the Row menu:

  - Outbound EDI Order Inquiry (P47016)
  - Supplier Master (P04012)

## Setting Processing Options for Inquire Requisition Awaiting Approval (P4209)

Processing options enable you to specify default processing values.

### Defaults

**Order Type**
Enter a value from UDC 00/DT to specify the order type.

## Setting Processing Options for Expiring Blanket Orders Inquiry (P4311)

Processing options enable you to specify default processing values.

### Defaults

**Order Type**
Enter a value from UDC 00/DT to specify the order type.

# Inquiry Program for Requisition Self-Service

You can access the following program from the UX One pages for Requisition Self-Service:

- Requisition Order Detail Inquiry (P43E11C)

  You can access the following programs from the Row menu:

  - Approve Requisitions Over Budget (P43E070)
  - Requisition Inquiry (P43E15)

## Setting Processing Options for Requisition Order Detail Inquiry (P43E11C)

Processing options enable you to specify default processing values.

## Defaults

**Order Type**

Enter a value from UDC 00/DT to specify the sales order type.

**Requisition Type**

Specify the type of requisition for which you want the data to be populated when you access the Requisition Order Detail Inquiry program from the UX One pages.

# Inquiry Program for Sales Order Management

You can access the following programs from the UX One pages for Sales Order Management:

- Inquire Held Orders (P4211)

  You can access the following programs from the Row menu:

  - Held Order Release (P43070)
  - Sales Order Entry (P42101)

- Inquire Orders by Customer Sales Representative (P4211JG)

  You can access the following program from the Row menu:

  - Sales Order Entry (P42101)