

PeopleSoft®

EnterpriseOne JDE5
Work Orders
PeopleBook

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EnterpriseOne JDE5
Work Orders PeopleBook
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Overviews

Overviews

The Work Orders system allows you to integrate all aspects of creating and processing work orders with the rest of your business operations.

This section provides overview information about work orders concepts and the Work Orders system.

Industry Overview

The term "work order" has numerous meanings with a wide variety of applications. The following definition is from the Educational Society for Resource Management dictionary (APICS), Ninth Edition:

"Work Order: 1) An order to the machine shop for tool manufacture or equipment maintenance; not to be confused with a manufacturing order. Syn: work ticket. 2) An authorization to start work on an activity (for example., maintenance) or product.

Reading this definition, work order appears to be more widely used for maintenance functions. However, companies often use the same definition for other activities, including service requests and manufacturing activities. Other terms for which this definition applies can include job order, work request, service request, or shop order.

Regardless of the terminology, the concept is the same. Generating a work order is the activity that starts the process of completing a task. The work order identifies the work that needs to be done, and the information collected captures the history of the work that is performed. The J.D. Edwards Work Order system can be used to track the following:

- Manufacturing of parts
- Equipment repair
- Project management
- Customer service calls

The Work Order system manages all of these.

Idea to Action: The Competitive Advantage

The following are typical problems or issues for using work orders, the business activator/idea to action that will resolve these problems, and the return on investment.

Operational Problem to Solve	Business Activator and Return On Investment
How do I integrate the Work Order system with other J.D. Edwards systems?	Work order features are available in many of the OneWorld systems, including Shop Floor Management, Customer Service Management, and Equipment/Plant Management. In addition, you can use work orders to manage small projects in the Job Cost system.
How do I indicate the	You can attach a list of parts and materials to any work order. The list provides

parts and materials that are required to complete a work order task?	<p>information for parts and materials to be committed or issued from inventory.</p> <p>You can generate purchase orders directly from the list that is attached to the work order.</p> <p>The Work Order system provides integration with the Inventory Management system. This integration eliminates the need to maintain individual inventory systems to support different groups. Setup labor costs are reduced and more accurate information is ensured. The need to purchase parts that might already be available is eliminated.</p>
What types of information can I print on work orders?	<p>You can print work orders and can include text, part lists or bills of materials, routings, additional information through standard descriptions and user defined codes, record types, and so on.</p> <p>The Work Order system provides online and printed information that workers can use to help eliminate errors.</p>
How can I reuse past work order information?	<p>You can use a parent work order to copy information to a new work order. On the new work order, you can add any unique information.</p> <p>Using a parent work order reduces labor costs and provides consistency between similar work orders and tasks.</p>
How do I ensure that an approval process for work orders exists?	<p>Workflow Management provides the ability to create automated processes that can perform various work order activities. For example, the system can automatically send a message to a supervisor for his or her approval if a work order cost exceeds a defined amount. You can also use workflow to prompt other events, such as committing inventory to a work order.</p> <p>Workflow Management ensures that work is not started without the appropriate approvals. This reduces time that is spent on invalid work orders and communicates activities to the appropriate personnel.</p>
How do I control and track a work order's progress?	<p>Work order activity rules can control a work order lifecycle to ensure that it progresses in a controlled manner. Work order activity rules can eliminate the mishandling or the improper movement of work orders, preventing any work from being performed or parts from being issued for unapproved work orders, thereby eliminating labor costs and wasted parts.</p>
Can I associate work orders with a project?	<p>Using Project Setup, you can create a project hierarchy to group work orders as a project. You can also use a master version of a project work order to generate work orders that use the same basic information.</p> <p>You can use project hierarchies to reduce input labor and provide consistency between similar tasks in a project. The project and task tracking is simplified, and project management is improved.</p>
How can I track work orders?	<p>You can track work orders in many ways, such as by:</p> <ul style="list-style-type: none"> • Customer number • Parent work order number • Project number • Job or business unit • Cross-referenced piece of equipment

The Work Order system simplifies management of similar or related orders. The system reduces the amount of time that you spend on searching and tracking work orders.

Work Orders Overview

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

For more information about the Work Orders system, review the following:

- *System Integration*
- *Features*
- *Work Order Tables*

System Integration

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

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

The Work Orders system works closely with the following J.D. Edwards systems:

- Address Book
- General Accounting
- HR Payroll
- Time Accounting
- Inventory Management
- Procurement
- Accounts Payable
- Equipment/Plant Management *
- Job Cost
- Service Billing

* Additional features and functions are available for work orders in this system. See the *Equipment/Plant Management Guide*.

Features

The Work Orders system includes the following features:

- Paperless processing
- Quick creation of work orders
- Approvals for work orders
- Activity rules for work orders
- Quick location of work orders
- Simple budget and estimate controls
- Multiple control dates
- Multiple levels of responsibility
- Unlimited narrative remarks
- Project setup and tracking
- Flexible project management reporting

Paperless Processing

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

Quick Creation of Work Orders

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

Approvals for Work Orders

You can establish approval controls for a work order based on a variety of criteria, including work order type, status, and the monetary amount involved. For example, you can specify that all maintenance work orders must be approved before any work can begin. You can also specify who must approve the work orders and the threshold monetary amount for which each person is responsible. The threshold is the amount above which the person specified must approve the work order. If the amount is less than the threshold, this person's approval is not required. You can also review the approval status of a work order.

Activity Rules for Work Orders

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

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

Quick Location of Work Orders

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

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

Simple Budget and Estimate Controls

You can use the Work Orders system to track the simple estimate and budget requirements of a work order. For example, you can enter budget information and track the information throughout the work order's life cycle. In addition, you can use a variety of reports to compare estimates with actual information.

Multiple Control Dates

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

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

Multiple Levels of Responsibility

You can assign several levels of responsibility to each work order on the Work Order Entry form, such as:

- The job or business unit charged for the work order
- The originator of the work order
- The manager
- The supervisor

You can also use category codes to assign levels of responsibility to work orders. You can review all the work orders assigned to a particular person or location.

Unlimited Narrative Remarks

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

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

You define the record types that are appropriate to your organization.

Project Setup and Tracking

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

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

Flexible Project Management Reporting

You can manage projects using the following reports:

Cost Summary	Provides cost summary information such as estimated and actual costs for work orders.
Cost Detail	Provides cost detail information such as individual transaction details for work orders.
Work Order Summary	Provides summary information such as hours planned and actual hours charged as of a specified date for work orders.
Detailed Task Description	Provides detailed information about the work orders in a project.
Project Status Summary	Provides summary and detailed status information for all work order projects that are assigned to a specific manager.

Work Order Tables

F0001 - Business Unit Security	Contains authorization for users of business unit information.
---------------------------------------	--

F0002 - Next Numbers	Assigns a unique number to each work order that you create.
-----------------------------	---

F0005 - User Defined Codes	Stores valid user defined system codes and descriptions.
-----------------------------------	--

F0006 - Business Unit Master	Stores job and business unit information.
-------------------------------------	---

F0091 - Standard Procedures/General Message	Stores general instructions that relate to a work order.
--	--

F0101 - Address Book Master	Contains name and address information for the customer, manager, originator, and supervisor.
F0901 - Account Master	Contains the chart of accounts information.
F0902 - Account Balances	Stores balances by account and by work order. It stores information by ledger type and fiscal year.
F0911 - Account Ledger	Stores amount and unit information that are related to each work order. The work order information is stored as a subledger with a subledger type of W.
F48001 - Work Order Default Coding	Stores default manager and supervisor codes for work orders by category codes 01 through 03.
F48002 - Work Order Record Type	Contains the valid work order record types. It stores header information for the Work Order Instruction table.
F4801 - Work Order Master	Contains one record for each work order. This table stores information about a work order, such as the description, estimated hours, responsibility, and costing information. It also stores planned start and end dates.
F4802 - Work Order Instruction	Contains one record per line of instruction. It stores description text and the various record types that are defined in the user defined codes, such as Description of Request and Final Disposition.
F4826 - Work Order Activity Rules	Stores activity rules that relate to a work order.
F4827 - Work Order Approval Routing	Stores rejection status of work orders.

Menu Overview

Work Order / Service Billing (G48)



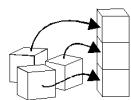
Daily Processing (G4810)

- S Work Order Processing (G4811)
- S Supplemental Data (G4813)
- S Simple Project Management (G4812)



Advanced and Technical Operations (G4831)

- S Update Phase/Equip No. in GL (R48802)
- S Work Order Purge (R48900)



Work Orders Setup (G4841)

- S User Defined Codes (G4842)

Daily

Work Order Creation

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

The Work Orders system creates a master record for every work order that is entered into the system. The master record consists of basic information that defines the work order, such as the work order number and description. You can also enter additional descriptive information to further identify the work order, such as special instructions.

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

Creating Work Orders

Work orders communicate information about unique tasks to others who are involved. When you enter a work order, the system creates a master record of that work order. A master record will exist for every work order that you enter in the Work Orders system. The master record includes basic information, such as:

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

The system stores master records in the Work Order Master table (F4801). Scheduling Workbench is used to search the Work Order Master table.

You can use processing options to have the system enter default information in a new work order, such as type, priority, status, and so on. You can also use processing options to assign the manager and supervisor, if you defined them when setting up the system. See *Setting Up Default Managers and Supervisors*.

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

To further define the work orders in your system, you can enter supplemental data. Supplemental data is useful for reporting and tracking work order details that are not included in the record types.

You can also use a parent work order to create a work order. After entering a parent work order number in the Parent Number field on the Work Order Entry form, any fields without

values are updated with the values from the parent work order. When the Parent Number field is left blank, the work order number is used. Every work order can be used as a parent work order if its Parent Number field is left blank. See *Copying Parent Work Orders*.

Note

You cannot delete a work order if it has any account ledger transactions associated with it or is used as a parent work order. You can, however, deactivate a work order by entering a code in the Subledger Inactive field on Enter Work Orders. Anything other than a blank field denotes that the work order is inactive.

Before You Begin

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

Entering Basic Work Order Information

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

You can assign up to 10 category codes to a work order. Use category codes to further identify and organize work orders that have similar characteristics. This is especially useful for analyzing and reporting on work order information from a variety of perspectives, such as shop, division, and type of work. You can also analyze work order costs according to category codes. J.D. Edwards provides several predefined category codes. You can use these or customize your own category codes. You define all values for each category code.

In addition, you can assign responsible personnel, such as an originator and a supervisor, to a work order. You can also specify a search cross-reference that the system uses to search for work orders. For example, if you enter an equipment number on the work order, the system enters the parent equipment number in the Search Cross-Reference field.

Note

Many of the fields on Work Order Details are optional, but information in these fields is particularly useful when you search for a work order or group of work orders. You can use processing options to direct the system to enter default values in several fields, such as address book fields, category code fields, approval type fields, and manager and supervisor fields, if you defined them during system setup.

You can also retrieve numerous default values from a parent work order, if you specify one. For example, you can use values from a parent work order to provide default values for the following fields:

- Work Order Type
- Start Date

- Planned Completion date

► To enter basic work order information

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

Alternatively, from the same menu, you can choose Work Order Entry to create a work order and enter work order information.

1. On Work With Work Orders, click Add.

2. On Enter Work Orders, complete the following field:

- Description

3. On the General tab, complete the following field:

- Charge to BU

4. Complete the following optional fields:

- Status Comment

- Search X-Ref

- W.O. Status

- Type
- Priority
- Message Number

You can use the Standard Description user defined code to assign standard procedures or instructions to multiple work orders. Standard Descriptions are stored in the Generic Message/Rate Types table (F00191).

- Flash Message
- Subledger Inact

You cannot delete a work order if it has any account ledger transactions associated with it or is used as a parent work order. You can, however, make a work order inactive by entering a code in the Subledger Inactive field. Anything other than a blank field denotes that the work order is inactive.

- Parent Number
- The parent number default is the work order number.
- Cost Code
 - Est. Hours
 - Est. Amount
 - Tax Expl Code
 - Tax Rate/Area

5. Click the Dates/Assignments tab and complete the following optional fields:

- Planned Comp
- Date Assigned
- Start Date
- Transaction
- Originator
- Supervisor

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

the address book number of the supervisor for work orders. See *Setting Up Default Managers and Supervisors*.

- Customer
 - Manager
6. Click the Amounts tab and complete the following optional fields for estimated and actual:
- Hours
 - Duration
 - Labor Cost
 - Material Cost
 - Other Cost
- If you attach routing instructions or a parts list, the system enters default values in the Estimated Hours field and the estimated amounts fields based on values from the parts list or the routing instructions.
7. Click the Classification tab and complete any of the work order Category Code fields as appropriate.

Note

Category code 1 is a four-character category code that appears on all work order reports and most forms that are associated with work orders.

8. To assign category codes to work orders, complete the following optional fields and click OK:
- Phase
 - Category 02
 - Category 03
 - Category 04
 - Category 05
 - Status
 - Service Type
 - Skill Type
 - Experience Level

- Category 10
9. Click the Assignments tab and complete any of the following fields to specify individuals responsible for the work order:
- Originator
If you leave the Originator field blank, the system enters an originator based on your address book number.
 - Manager
Depending on how you set processing options, you might be required to enter a customer number.
10. Complete the following optional fields and click OK:

Entering Record Type Descriptions

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

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

- Description only
- Description with three columns

You can also copy descriptive information from another work order.

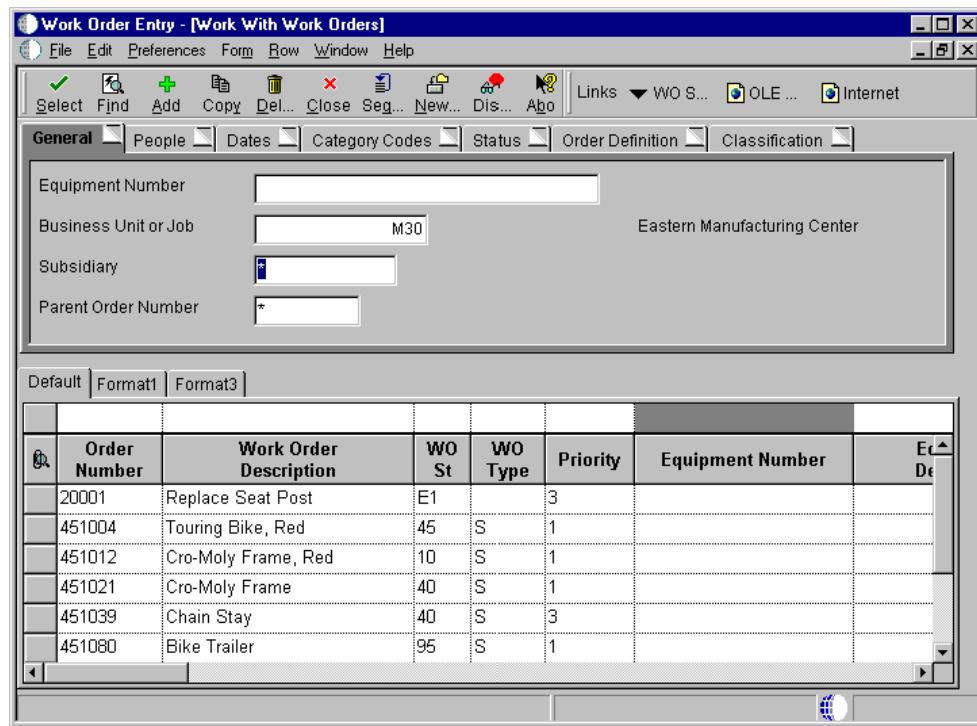
See Also

- Setting Up Formats for Record Types*

► To enter record type descriptions

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

Alternatively for EAM, from the Daily Service Order Processing menu (G1712), choose Service Order Entry.



1. On Work With Work Orders, complete any of the following fields on the General tab to locate a work order and then click Find:
 - Equipment Number
 - Business Unit or Job
 - Subsidiary
 - Parent Order Number

Alternatively, you can complete any of the fields on any of the tabs to locate work orders.
2. Choose a work order and choose Record Types from the Row menu.

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Select Workspace: Active Foundation

Active Foundation

Work With Work Order Record Types

Order Number: 451004 Touring Bike, Red

Record Type	Description
<input type="checkbox"/> A	Full Description of Request
<input type="checkbox"/> B	Final Disposition Remarks
<input type="checkbox"/> C	Tool and Equipment Instruct.
<input type="checkbox"/> D	Safety Provisions
<input type="checkbox"/> E	Plan and Drawing Reference
<input type="checkbox"/> F	Equipment Down Time
<input type="checkbox"/> G	Maintenance Loops
<input type="checkbox"/> S	Status History
<input type="checkbox"/> Z	Associated PMs

3. On Work With Work Order Record Types, choose a record type and click Select.

PeopleSoft®

Select Workspace: Active Foundation

Active Foundation

Work Order Detail Revisions

Order Number: 451004 Touring Bike, Red

Record Type: Full Description of Request

	Description
<input checked="" type="checkbox"/>	Full Description of Request

4. On Work Order Detail Revisions, complete the following field with a unique description for the selected record type for this work order and click OK:
 - Description
5. To enter descriptions for other record types for this work order, repeat steps 3 through 4.

Processing Options for Work With Work Orders (P48201)

Defaults 1

Enter the Default Category Codes to be used to Search for Work Orders

1. Phase
2. Category Code 02
3. Category Code 03
4. Category Code 04
5. Category Code 05
6. Category Code 06
7. Category Code 07
8. Category Code 08
9. Category Code 09
10. Category Code 10

Defaults 2

Enter the Default Values to be used to Search for Work Orders.

1. From Status Code W.O.
2. Thru Status Code W.O.
3. Type - W.O.
4. Document Type
5. Models

Blank = Do not include models

1 = Include models

Defaults 3

Enter the default address book numbers to be used to search for work orders.

1. Job or Business Unit
2. Originator
3. Customer
4. Planner
5. Supervisor

Versions

Enter the version of the following applications to call. Leave blank to use the default version defined in parentheses.

1. Work Order Print (XJDE0001)
2. Completed PM - P12071 (ZJDE0001)
3. Parts List - P3111 (ZJDE0001)
4. Routing Instructions - P3112 (ZJDE0001)
5. Inventory Issues - P31113 (ZJDE0002)
6. Time Entry - P311221 (ZJDE0001)(CSMS Only)
7. Work With Returned Material Authorization
P40051 (ZJDE0001)
(CSMS Only)
8. Open Purchase Order - P4310 (ZJDE0011)
9. Returned Material Authorization Revisions Version - P400511
(CSMS Only)
10. On Line Service Order Quote - P17717 (ZJDE0001)
(CSMS Only)
11. Time Entry By Employee - P051121(ZJDE0001)

WO Entry

1. Choose the work order entry program to call when adding or selecting a work order. This entry program will also decide which UBE will be called for printing.

-
- '1' - Equipment Work Orders (P48011)
 - '2' - Service Work Orders (P17714)
 - '3' - Project Task Details (P48014)
 - '4' - Tenant Work Orders (P15248)

2. Enter the version of the selected work order entry to call. Leave blank to use default version defined in parentheses.

Work Order Entry (ZJDE0001)

Process

- 1. Enter a '1' to highlight the priority field within the grid. Leave blank to not highlight.
- 2. Customer Self-Service Functionality

Blank = Bypass Customer Self-Service functionality.

1 = Activate Customer Self-Service functionality for use in Java/HTML.

2 = Activate Customer Self-Service functionality for use in Windows.

Working with Supplemental Data

You can enter supplemental data to further define the work orders in your system.

Supplemental data is useful for reporting and tracking work order details that are not included in the record types, such as a data type for safety procedures.

You can use the following formats when you define supplemental data for work orders:

C (Code) You can define column titles and enter information--such as dates and amounts--in the columns.

**N
(Narrative)** You can enter free-form text, such as notes and memos. You can attach narrative to code information.

After you enter supplemental data, you can use the following formats to review the information:

By data type You can review additional information based on a supplemental data type. For example, if you set up a data type for budget estimates, you can review a list of all work orders that have been assigned this data type.

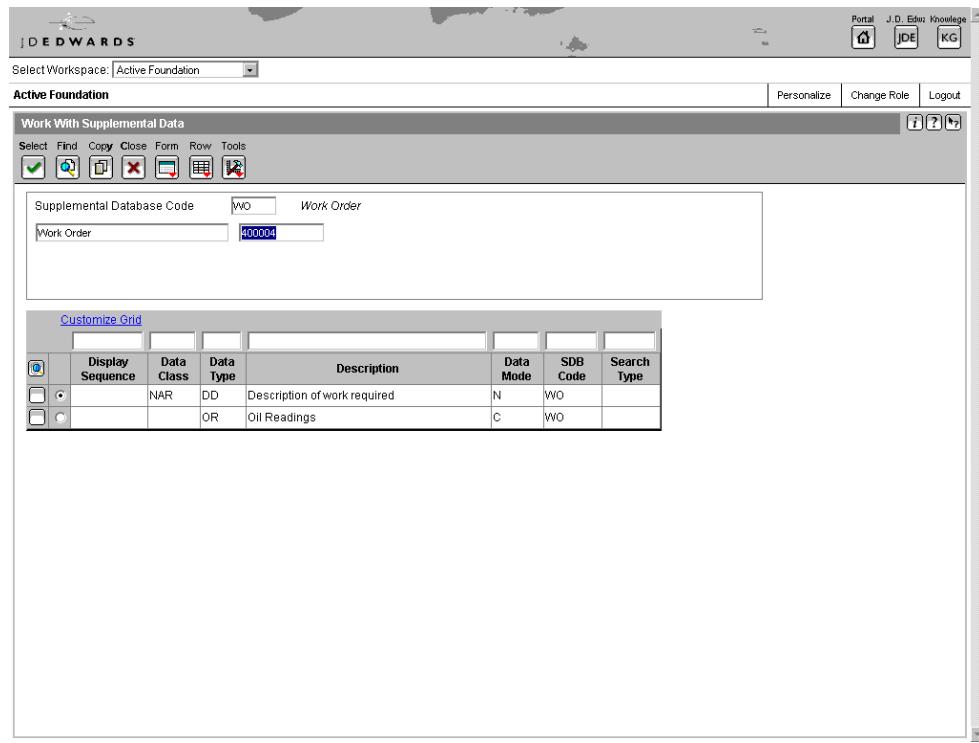
By work order You can review additional information based on work order numbers. This process enables you to review all of the supplemental data for a work order.

Before You Begin

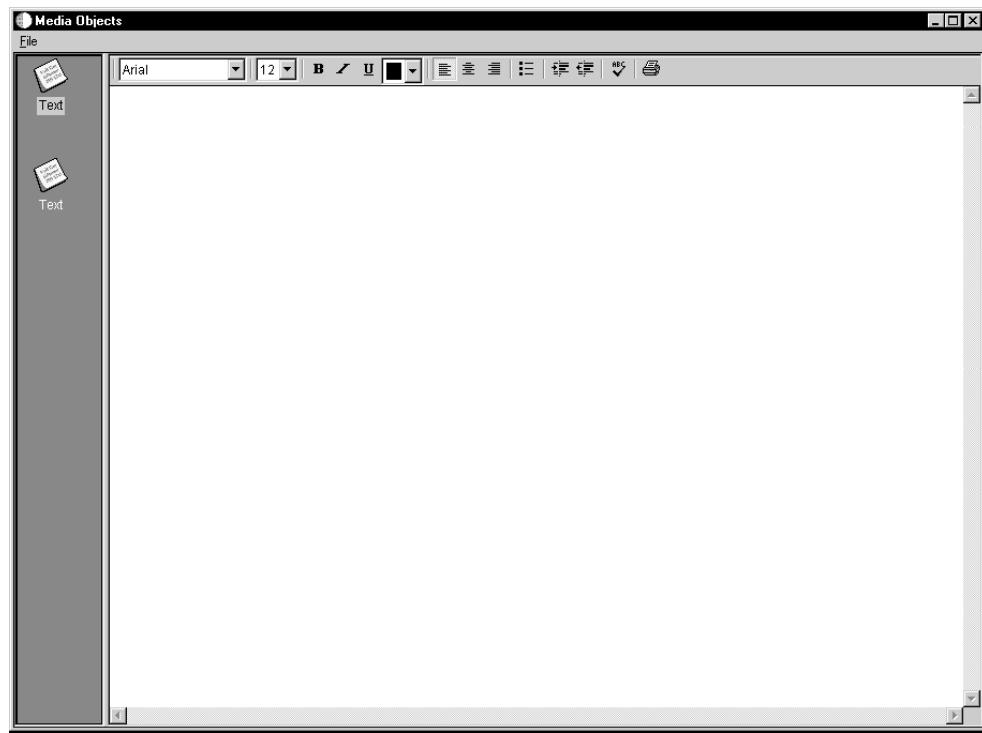
- Set up the supplemental data types for the work orders in your system. See [Setting Up Supplemental Data for Work Orders](#).

► To add supplemental data to work orders

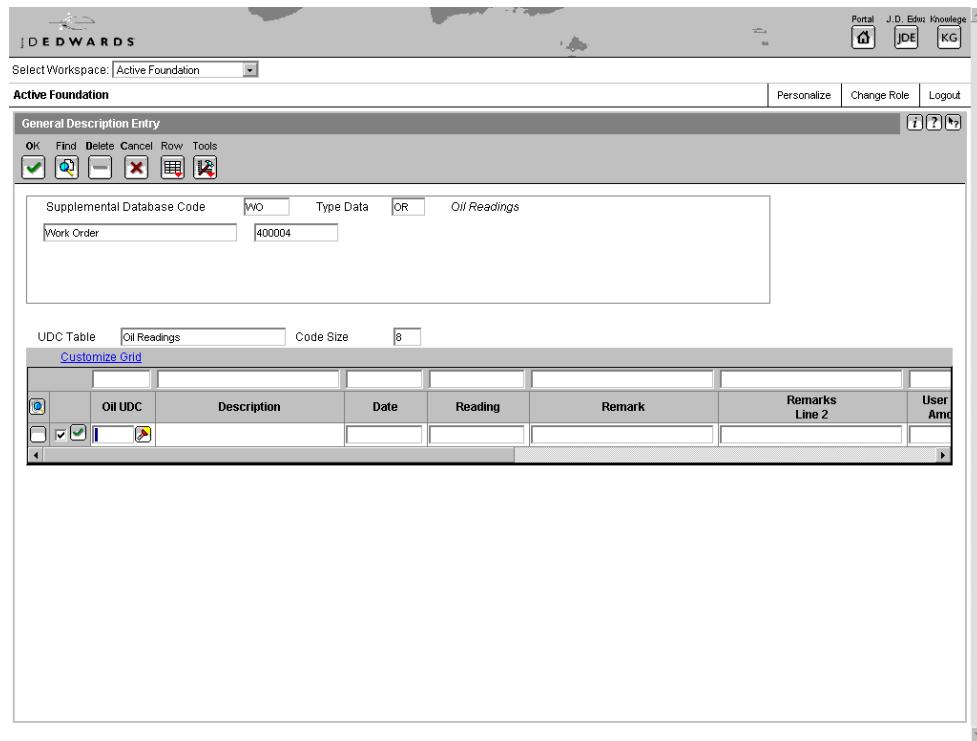
From the Work Order Supplemental Data menu (G4813), choose Data Entry.



1. On Work With Supplemental Data, enter the order number in the following field (Work Order) and click Find to display a list of valid supplemental data types for a work order.
 - WO.Number
2. Choose the data type for which you want to enter supplemental data for this work order, and click Select.
 - If the data type is in Narrative format, go to Step 3.
 - If the data type is in Code format, go to Step 6.



3. For Narrative data types on Media Objects, choose New from the File menu, and then choose Text.
4. Type the narrative text, such as safety procedures.
5. From the File menu, choose Save & Exit.



6. For Code data types on General Description Entry, complete any of the fields as needed and click OK.

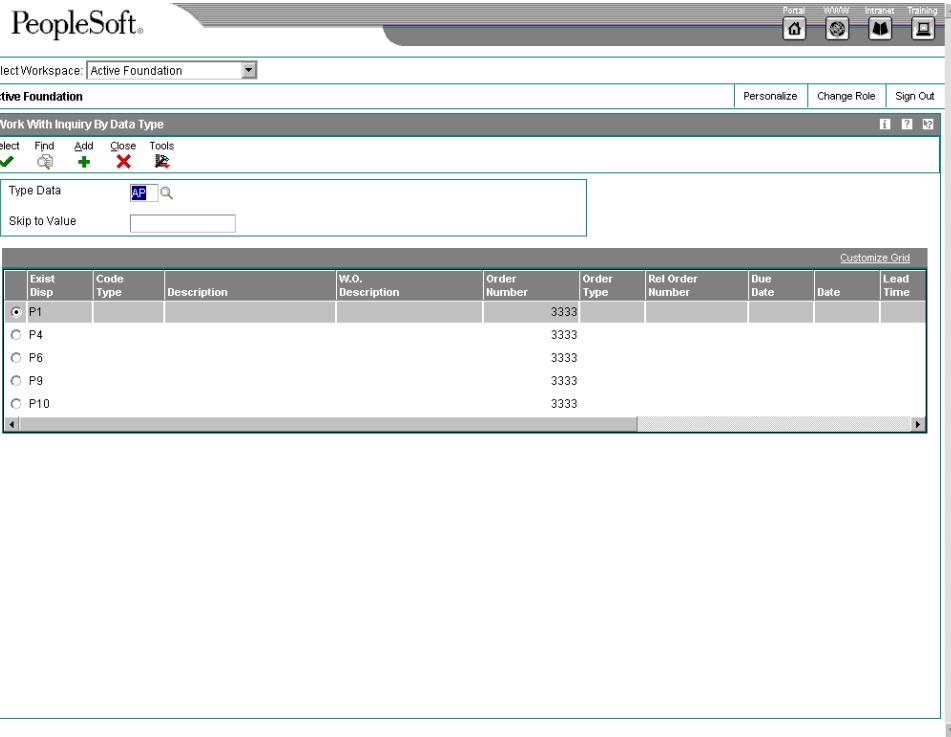
Processing Options for Work With Supplemental Data (P00092)

Processing

1. Select the Supplemental Database Code for the system you would like to create a central information index for.
 2. Enter a '1' if the system should not assign an ending effective date when the field is left blank.
-

► To review supplemental data by type

From the Work Order Supplemental Data menu (G4813), choose Inquiry by Data Type.



1. On Work With Inquiry By Data Type, complete the following field and click Find:
 - Type Data
2. Choose a work order to review and click Select.
3. On Work Order Data Revisions, review the additional information.

You can also revise any of the information as needed.

Processing Options for Inquiry by Order (P480200)

Defaults

1. Enter a Supplemental Database Code. Only Data Types with this Database Code will be displayed. If left blank, the Engineering Change Orders data types (Database "ECO") will display.

Supplemental Database Code

Defaults (Cont)

2. Enter Type Data Work Order code. This is the user defined code 00, type WT, which indicates the type of data being entered into the supplemental database. Examples are PO for Pending or DT for Details.

Type Data

Processing Options for Inquiry by Data Type (P480210)

Display option

1. Enter the Work Order Data Base. Only Data Types with this Data Base can be displayed on the screen. Leave blank to default Data Base "E" (Engineering Change Orders).
2. Enter the Date Type within the Data Base above to default on the screen. If left blank, no Data Type will be defaulted.

► To review supplemental data by work order

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

W.O. Number	W.O. Ord Typ	W.O. Description	Type Data	Type Data Description	User Def Code	UDC Description	Order No.
451645 VM	Refurbish VM14 Vertical Mill	DD	Description of work required				
451645 VM	Refurbish VM14 Vertical Mill	OR	Oil Readings	WATER	Water Reading		
451645 VM	Refurbish VM14 Vertical Mill	OR	Oil Readings	WATER	Water Reading		

1. On Work With Supplemental Data, complete the following field and click Find:
 - Order No.
2. To view additional information, choose the appropriate options from the Row menu.

Copying Parent Work Orders

You can use a parent work order to quickly create a new work order. On the new work order, you need to complete the Parent Number field and those fields that require unique information. If you leave the remaining fields blank, the system completes them with values from the parent work order.

For example, you might need to perform maintenance on a machine that is similar to the maintenance that you performed on another machine. You can assign the previous machine's

work order as the parent of the new work order. The system automatically enters the appropriate information from the parent work order into the new work order.

You can also use the Copy button on Work With Work Orders to copy parent work orders.

When you copy an existing work order, the system assigns a unique number to the new work order. Otherwise, the following information remains unchanged:

- All information from the Work Order Details form
- Parts list
- Labor routing instructions
- Record types

You can also use a parent work order as the basis for creating a work order. The system uses the information stored in the master for the parent work order to automatically enter the basic work order information, category codes, and record type information into the new work order. Use this method when you need to group work orders that share information that is used for reporting and cost accounts.

See Also

- Entering Basic Work Order Information*
- Understanding the Application User Interface* in the *OneWorld Foundation Guide* for information on the Copy button

► To copy parent work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

Alternatively for EAM, from the Daily Service Order Processing menu (G1712), choose Service Order Entry.

1. On Work With Work Orders, click Add.
2. On Enter Work Orders, complete the following field in the header area:
 - Description
3. On the General tab, complete the following field:
 - Parent Number
4. Complete any fields that must contain unique information, including the following fields:
 - Tax Expl Code
 - Tax Rate/Area
5. Leave the remaining fields blank so that the system can complete them with values from the parent work order.
6. Click OK.

The system provides default information from the parent work order for those fields that are left blank. It also copies the parts list, routing instructions, and record types from the original work order to the new work order.

7. Click Cancel
8. On Work With Work Orders, locate the new work order.

The work order is identical to the one that you copied but with a unique parent order number. You can revise any of the fields that contain information from the parent work order and enter any additional information, such as category codes and record types.

Creating Work Orders for a Project

For a group of maintenance tasks that are interrelated and subordinate to a larger task, such as a plant shutdown or the retooling of a manufacturing line, you can combine the tasks into a project. Setting up a project is especially useful when you need to monitor the day-to-day details of a project within the context of the project as a whole.

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

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

Use processing options to specify which Work Order Details form the system will display when you want to enter additional work order information. You can then enter additional information about each work order, such as status comments or an extended description of the task.

See Also

- Copying Parent Work Orders*
- Entering Record Type Descriptions*

► To create work orders for a project

From the Simple Project Management menu (G4812), choose Project Setup.

1. On Project Setup, complete the following field in the header area:
 - Parent W.O. No
2. Complete the following optional fields in the header area:
 - Customer Number

Enter the customer number in this field. For project work orders, use the customer number in combination with either the job or business unit, or the parent work order number.

If you use only the customer number, you must use the Enter Work Orders form to enter all the necessary work order information for the individual work orders in the project.

- Job or BU

If you create work orders for a project using the job or business unit, the system completes all of the default information that is related to project cost. You must use the Enter Work Orders form to enter any additional work order information that you want to associate with the individual work orders for the project.

3. For each work order in the project, complete the following fields in the detail area:

- Phase
- Task
- Start Date
- Complete Date
- Hours
- Manager

4. Click OK.

The system creates the project for the work orders that you entered.

5. To locate and revise any of the unique information for your project work orders, click Find.
6. On Project Setup, choose a work order and then choose WO Detail from the Row menu.

The screenshot shows the 'Project Setup - [Enter Work Orders]' application window. The title bar includes standard Windows icons and the application name. The menu bar has options: File, Edit, Preferences, Form, Window, Help. Below the menu is a toolbar with buttons for OK, Cancel, Discard, Apply, Links, Record..., OLE..., and Internet. The main area has input fields for Order Number (20001) and Description (Replace Seat Post). A tabbed panel at the top right shows 'General', 'Dates/Assignments', and 'Classification'. The 'General' tab displays various fields: Status Comment (empty), Parent Number (empty), Search X-Ref (empty), Charge to BU (M30), W.O. Status (E1), ECO Entered (checkbox), Cost Code (empty), Type (checkbox), Est. Hours (21,00), Priority (3), Normal (checkbox), Est. Amount (empty), Std. Description (empty), Tax Expl. Code (empty), Flash Message (checkbox), Tax Rate/Area (empty), Subledger Inact (checkbox), Active Subledger (checkbox). The status bar at the bottom shows 'File Edit Preferences Form Window Help'.

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7. On Enter Work Orders, revise any fields that must contain unique information (rather than default information from the parent work order).
8. Enter any additional information, such as category codes and record types, to the work order, and then click OK.
9. Repeat steps 6 through 8 for each project work order that you need to revise.

Processing Options for Project Setup (P48015)

Processing

1. Enter a '1' to default the manager and supervisor based on the values for category codes 1, 2 or 3.
2. Enter the defaults for the following fields:
 - a. Type
 - b. Priority
 - c. Beginning Status
 - d. Phase (Categorie Code 1)
 - e. Categorie Code 2
 - f. Categories Code 3

Program

1. Choose the work order entry program to call when the option exit is used:
 - '2' = Equipment Work Order (P48011)
 - '3' = Work Order Entry (SAR) (P48012)
 - '4' = Manufacturing Work Order (P48013)
 - '5' = Project Task Details (P48014)(default)

Work Order Processing

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

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

The life cycle of a work order consists of the steps or statuses through which a work order must pass, indicating the progress of the work. For example, the life cycle of a work order can include the following statuses:

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

After you have created work orders, you can perform a variety of tasks to manage the work orders as they move through the work order life cycle. For example, you can:

- Search for specific work orders or groups of work orders
- Revise information, such as start date, priority, status, and so on, as work orders move through the life cycle and demands on your maintenance organization change
- Review information about the parts lists for work orders
- Print hard copies of work orders for use by maintenance personnel
- Change the status of a work order to complete, indicating that the maintenance tasks have been performed

Locating Work Orders

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

- A job or business unit
- The person who originates the work orders
- The person who manages or supervises the work to be performed
- User defined information that is associated with the work orders, such as category codes and work order types
- Dates associated with the work orders, such as start date and planned completion date

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

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

Cross-System Functionality You must have the Equipment/Plant Management system (13) in addition to the Work Orders system to access the following programs from the Scheduling Workbench:

- Unscheduled Preventative Maintenance
- Equipment Backlog
- Capacity Messages
- Completed Preventative Maintenance
- Parts List
- Equipment Work Orders
- Instructions
- Issues

You must have the Procurement system to access Open Order Inquiry.

► **To locate work orders**

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

Order Number	Work Order Description	WO St	W.O. Type	WO Type	Priority	Priority
	20001 Replace Seat Post	E1	ECO Entered		3	Normal
	65010 Security - Perimeter Guards		9	Standing W.O. - Do not Delete	.	.
	65015 DIA Security Services	10	Released (Firm) Not Star 9	Standing W.O. - Do not Delete	.	.
	65016 Security Services	10	Released (Firm) Not Star 9	Standing W.O. - Do not Delete	.	.
	65017 Security Services	10	Released (Firm) Not Star 9	Standing W.O. - Do not Delete	.	.
	65020 Security Review	10	Released (Firm) Not Star 9	Standing W.O. - Do not Delete	.	.
	65023 Security Guard Supervisor	10	Released (Firm) Not Star 9	Standing W.O. - Do not Delete	.	.
	65031 Perimeter Guards	10	Released (Firm) Not Star 9	Standing W.O. - Do not Delete	.	.
	65040 Screeners for Concourse Gates	10	Released (Firm) Not Star 9	Standing W.O. - Do not Delete	.	.
	65041 Security Rehearsal	10	Released (Firm) Not Star 9	Standing W.O. - Do not Delete	.	.

On Work With Work Orders, complete any of the following fields to locate a work order and click Find.

- Equipment Number

Alternatively, you can complete any of the fields on any of the tabs to locate work orders.

Working with Work Order Approvals

You can review, approve, or reject work orders. After a work order is created, the system sends an electronic message to notify the person who is responsible for reviewing and approving the work order. When you approve a work order, the system then sends an electronic mail message to the next person on the work order approval route. If you reject a work order, the system sends an electronic mail message to the originator of the work order. These messages can be read using the Scheduling Workbench.

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

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

Approving Work Orders

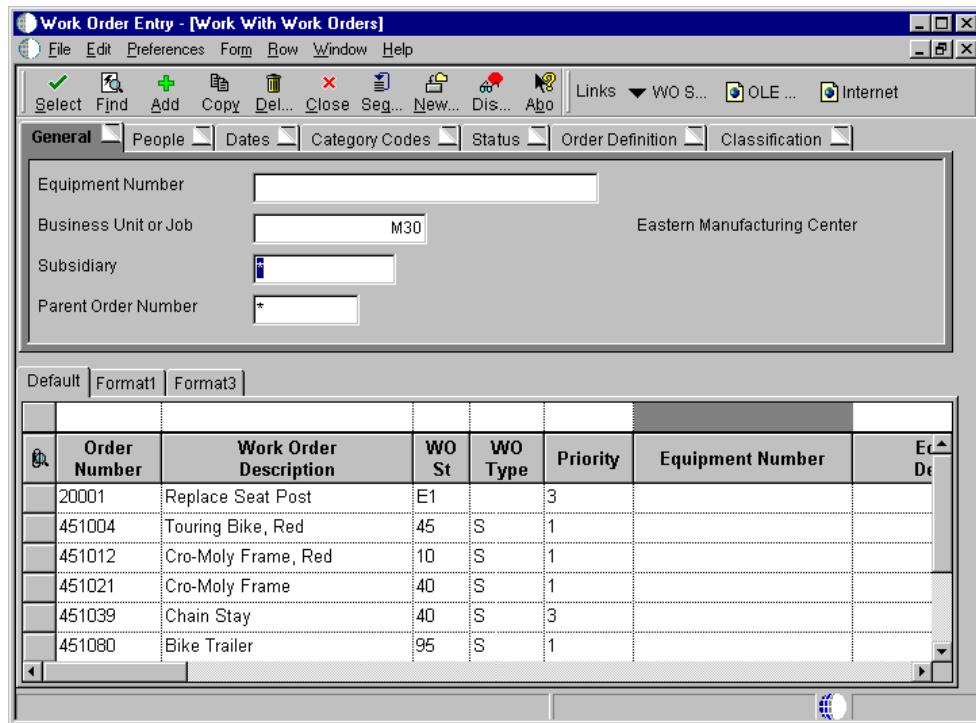
You can use the Scheduling Workbench to review and approve work orders. You can also directly access these work orders from the Employee Work Center of the Workflow Management menu (G02).

Before You Begin

- ❑ Set up user profiles for all personnel who are responsible for approving work orders. See *Setting Up User Profiles*.
- ❑ Verify that all personnel who are responsible for approving work orders are included in the work order approval routing. See *Setting Up Approval Routes for Work Orders*.

► To approve work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

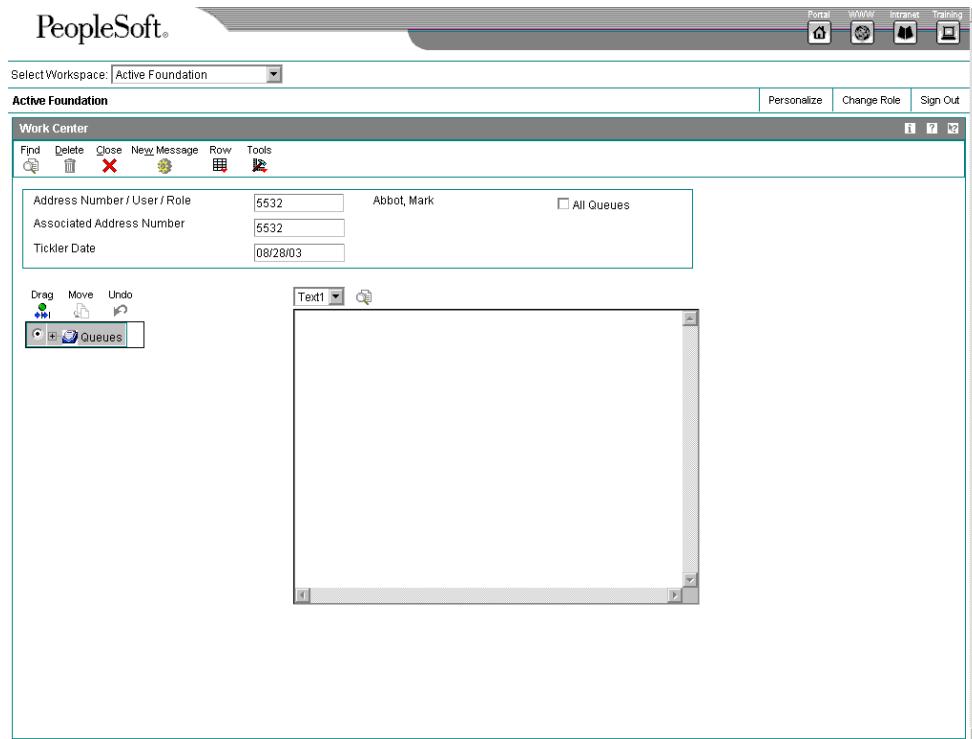


1. On Work With Work Orders, complete any of the following fields and click Find:
 - Equipment Number
 - Business Unit or Job
 - Subsidiary
 - Parent Order Number
 - Order Number

Alternatively, you can complete any of the fields on any of the tabs to locate work orders.

2. Choose the work order that you want to approve, and choose WO Approval from the Row menu.

The system displays all work orders for which approvals are pending on the Work Center.



3. On Work Center, approve or reject the work order.

For additional information, see *Messages and Queues* in the *OneWorld Foundation* documentation.

Reviewing the Approval History of Work Orders

You can use Scheduling Workbench to monitor the status and progress of work orders. You can review the current approval status of any work order in your system. When you enter a work order number on Scheduling Workbench, the Process Activity Monitor displays the following:

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

You can also review any notes about the work order.

► **To review the approval history of work orders**

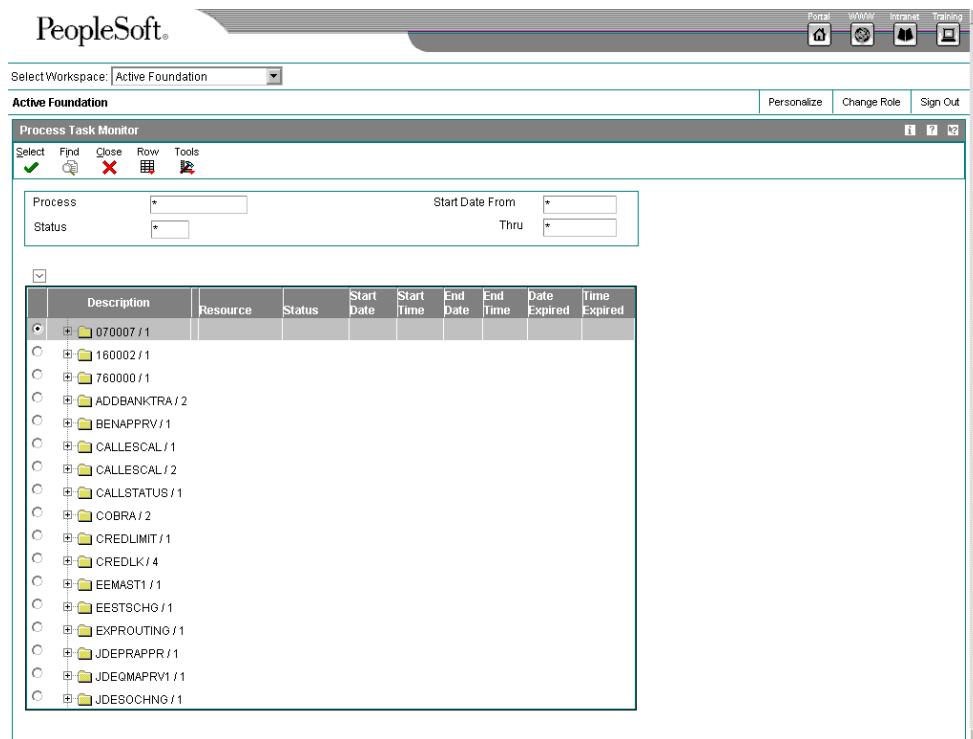
From the Work Order Processing menu (G4811), choose Scheduling Workbench.

1. On Work With Work Orders, complete any of the following fields and click Find:

- Equipment Number
- Business Unit or Job
- Subsidiary
- Parent Order Number
- Order Number

Alternatively, you can complete any of the fields on any of the tabs to locate work orders.

2. Choose the work order to review, and choose WO Approval Audit from the Row menu.



3. On Process Activity Monitor, review any notes that the approver might have entered for the work order.

Revising Work Orders

You can revise work orders as they move throughout the work order life cycle. The life cycle of a work order consists of the steps or statuses through which a work order must pass, indicating the progress of the work.

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

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

For example, you can change the start date of work orders if you do not have the labor resources or parts that you need to complete the work.

You can use search criteria to narrow your search to the specific work orders that you want to revise. This is especially useful when you need to revise a single field for a group of related work orders.

See Also

- Setting Up Approvals for Work Orders*

► To revise work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

1. On Work With Work Orders, to limit your search to a specific work order or group of work orders, complete any combination of fields on any of the tabs and click Find.
2. Choose the work order that you need to revise and click Select.
3. On Enter Work Orders, make any necessary revisions to the work order information.
4. To update life cycle information, complete the following field on the General tab and click OK:
 - W.O. Status

If you located multiple work orders in step 1, repeat steps 2 through 4 for each work order that you need to revise.

Printing Work Orders

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

Printing a Single Work Order

You can print a single work order when you need a hard copy of a work order. For example, shop personnel might need to print a hard copy of a work order for each piece of equipment that is serviced. If you already know the work order number, you can quickly print the work order from Scheduling Workbench. You use processing options to specify which version of the Maintenance Work Order Print program the system uses to print the order.

► To print single work orders

From the Work Order Processing menu (G4811), choose Scheduling Workbench.

Alternatively for EAM, from the Daily Service Order Processing menu (G1712), choose Service Order Entry.

1. On Work With Work Orders, to limit your search for a specific work order, complete any combination of fields on any of the tabs and click Find.
2. Choose the work order that you want to print and do one of the following:
 - From the Row menu, choose Print WO.
 - Click Select and continue to Step 3.
3. On Enter Work Orders, choose Print Work Order from the Form menu.

Printing Multiple Work Orders

From the Work Order Processing menu (G4811), choose Work Order Print.

You can print multiple work orders by using report selection criteria to specify the work orders that you want to print.

You print work orders when you need a hard copy of a group of work orders. When you run Print Work Orders, you use data selections to specify which work orders to print or suppress. You then use processing options to specify the information that you want to print, such as whether to suppress dates associated with work order record type information, suppress estimated hours associated with work orders, or print equipment messages associated with a piece of equipment on the work order. In addition, you can enter record types to be printed with a work order. You also can specify whether the system changes the status of the work orders at the same time that it prints them.

To print multiple work orders, choose Print Work Orders. When you choose Print Work Orders, the system displays a versions list. The versions list includes a DEMO version that you can run or copy and revise for your business needs.

See Also

- ❑ *Working With Batch Versions* in the *OneWorld Foundation* documentation for information about running, copying, and changing a report version
- ❑ *R48425, Print Work Orders* in the *Reports* documentation for a report sample

Working with Charges to Work Orders

You can charge costs to work orders using any J.D. Edwards system that creates general ledger transaction records with a subledger type of W. For example, for a particular work order, you can use the Accounts Payable system to charge for travel time and expenses, the

Inventory Management system to charge for material costs, and the Payroll or Time Accounting systems to charge for employee time.

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

For example, using subledger accounting, you can do the following:

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

Adding Charges to Work Orders

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

Note

You can only add charges to open work orders. You can identify a closed work order by the code in the Subledger Inactive field on the Enter Work Orders form. Any value in this field indicates that it is closed.

Cross-System Functionality

You can add charges to a work order using any J.D. Edwards system that creates general ledger transaction records with subledgers. Following are some guidelines:

Time Accounting, Inventory Management, and Accounts Payable systems	You can access Inventory Management and Accounts Payable by using selections on the Work Order Processing menu. To access Time Accounting, you need to enter the fast path menu number. You must have installed these systems to use their functionality with the Work Orders system.
Inventory Management system	You can use the Inventory Issues program to enter charges for inventory and materials against a work order. See <i>Issuing Inventory</i> in the <i>Inventory Management</i> documentation.

Speed Code Entry

You can save time and reduce the possibility of data entry error by using speed codes when you add charges to work orders. Speed codes are a quick way of entering an account number that is already in the system so that you do not have to re-enter the information. When you use speed code entry, the system:

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

The code that you enter in the Account Number field for speed code entry depends on the system that you use to add charges to work orders, as follows:

Accounts Payable system Enter a back slash, work order number, a period, and an object account number (\WO.object account)

Example: \1919.SHOP

Inventory Management system Enter a back slash, work order number, a period, and an object account number (\WO.object account)

Example: \1919.SHOP

You must have installed the following systems to use the Inventory Management system:

- Inventory Base and Order Processing (system 40)
- Inventory Management (system 41)

Time Accounting system Enter a back slash, work order number, and a period (\WO.)

Example: \1919.

You must have installed at least one of the following systems:

- HR and Payroll Foundation (system 05)
- Stand-alone Time Accounting (system 05T)
- Payroll (system 07)
- Payroll (Canadian system 77)

In addition, you must set up accounting rules for work orders.

See Setting Up Accounting Rules for Work Orders.

► To add charges to work orders

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

1. To enter a typical accounts payable voucher, on Speed Voucher Entry, enter the information for the accounts payable voucher.

See Working with Standard Vouchers in the Accounts Payable documentation for information about entering an accounts payable voucher.

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

- Account Number
- Sub-ledger
- Subledger Type

3. Click OK.

Processing Options for A/P Speed Voucher Entry (P0411SV)

Manual Checks

1. Enter a '1' for manual checks

1 = Manual Check Creation

2. Enter a '1' to automatically assign payment number based on the bank account's next payment number

1 = Auto Payment Numbers

MBF Version

1. Enter the version of the Voucher Entry Master Business Function to be used for Speed Voucher Entry. If left blank, version ZJDE0001 (of application P0400047) will be used.

Version

Reviewing Charges by Job or Business Unit

To help control costs and increase productivity, you can review work order costs that are charged against a particular job or business unit. You can review a summary of these costs, or you can review the charges that are within a specific date range or ledger type. If you do not limit your search criteria, the system displays all work orders within the job or business unit, along with the estimated and actual hours, and costs for each work order.

► To review charges by job or business unit

From the Simple Project Management menu (G4812), choose Work Order Cost by Job.

1. On Work Order Cost by Job, complete the following field:

- Job or BU

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

2. Complete the following optional fields and click Find:

- Ledger Type
- Phase

To review accumulated totals for a work order, complete the Phase field. The system displays accumulated totals, beginning with the first work order in the phase that you select.

3. To review detailed transaction information for a work order, choose Work Order Cost from the Row menu.

Reviewing Charges by Work Order

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

- Description of the transaction

- Account number that was charged
- Units that are charged, such as hours
- Amount of the transaction
- Batch number and the date
- Person responsible for the transaction
- Document number and document type
- Inventory item number or description

When you access the cost detail information for a work order, the system displays all general ledger transaction records for the work order. You can view the costs within a range of dates or by a ledger type. If you do not limit your search criteria, the system displays all of the costs that are charged to the work order.

Note

In the general ledger, the system uses subledger accounting to handle cost accounting for work orders. The work order number is the subledger number, and the subledger type is always W (work order).

► To review charges by work order

From the Simple Project Management menu (G4812), choose Cost Detail.

1. On Work With Work Order Cost, complete the following field:

- Order Number

2. Complete the following optional fields and click Find:

- Ledger Type
- From
- Thru

The system displays details about each work order transaction.

Processing Options for Cost Detail (P48211)

Defaults

1. Ledger Type

Periodic

Work Order Reports

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

You can print cost reports to review the costs associated with work orders, such as estimated and actual hours and costs. You can also review details about the cost transactions that you charge to work orders.

Project management reports help you manage work order projects and schedules. These reports include the following information:

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

See Also

- Working With Batch Versions* in the *OneWorld Foundation* documentation for information about running, copying, and changing a report version

Printing Cost Reports

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

Printing the Cost Summary Report

From the Work Order Processing menu (G4811), choose Work Order Cost Summary. Alternatively, from the Equipment Work Orders menu (G1316), choose Print WO Cost Summary.

You can print cost summary information for work orders and use processing options to enter the date range for the report. This report includes the following:

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

The system draws information for this report from the following tables:

- Work Order Master File (F4801)
- Account Ledger (F0911)

Processing Options for Print Work Order Cost Summary (R48497)

Process

1. Enter the date range for the report.

Leave blank (default) to include all costs, regardless of their G/L dates.

- a. From Date:
 - b. Thru Date:
-

Printing the Cost Detail Report

From the Work Order Processing menu (G4811), choose Cost Detail. Alternatively, from the Equipment Work Orders menu (G1316), choose Print WO Cost Detail.

Print the Work Order Cost Detail report to review detailed information on the costs you charge to work orders. You use processing options to specify the date range for the report. The report includes:

- Actual hours and amounts charged to each work order
- The G/L date for each transaction
- An explanation of each transaction
- Total hours and amounts by phase code

The system draws information for this report from the following tables:

- Work Order Master File (F4801)
- Account Ledger (F0911)

Processing Options for Print Work Order Cost Detail (R48498)

Process

Enter the From Date. Leave blank (default) to include all costs with G/L dates up to the Thru Date below.

1. From Date

Enter the Thru Date. Leave blank (default) to include all costs with G/L dates from the From Date forward.

2. Thru Date
-

Printing Project Management Reports

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

Printing the Work Order Summary

From the Work Order Processing menu (G4811), choose Print Work Order Summary.

You can print summary information to track and compare the progress of selected work orders, including the following details:

- Number of hours planned for each work order
- Number of actual hours charged as of the date that you specify
- Difference between hours planned and hours charged to date
- Variance between estimates and actuals

You can use a processing option to control the format for printing equipment numbers on this report.

The report also includes the following information about each work order:

- Planned completion date
- Priority (designated by P)
- Status of the work order at the time that you run the report

The system draws information for this report from the Work Order Master File table (F4801).

Processing Options for Work Order Summary Print (R48496)

Print

1. Choose how to print the Equipment Number:
 ' ' = No Equipment Number
 '1' = Asset Number
 '2' = Unit Number
 '3' = Serial Number
-

Printing the Detailed Task Description

From the Simple Project Management menu (G4812), choose Detailed Task Description.

The Detailed Task Description lists the work orders that are included in a project. For each work order, the report includes the following:

- Description
- Estimated number of hours
- Standard message
- Category code 01 (phase)
- Extended description from record type A
- Any standard procedures

Printing the Project Status Summary

From the Simple Project Management menu (G4812), choose Print Project Status Summary.

The Project Status Summary contains summary and detailed status information about all the projects that are assigned to a specific manager, including:

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

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

Processing Options for Print Project Status Summary (R48495)

Print

1. Print Ledger Type

A specific ledger type

Blank = All ledger types

Setup

System Setup

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

Setting Up User Defined Codes

User defined codes enable you to customize the Work Orders system for your particular business needs. Although a number of pre-defined codes are provided with the Work Orders system, you can revise them and set up new codes.

After you set up user defined codes, you can assign them to work orders. You can set processing options for the Work Order Entry program (P48201) so that the system assigns default values for user defined codes on work orders.

See Also

- Entering Basic Work Order Information* to set processing options for default UDCs on work orders
- Customizing User Defined Codes* in the *OneWorld Foundation* documentation

Type Codes (00/TY)

Use these codes to group work orders by type, such as emergency work order or preventive maintenance work order. The system displays this classification code field on Enter Work Orders and Backlog Management.

The Work Order Processing system includes predefined type code values. If these type codes do not meet your needs, you can modify them or you can create new ones.

Work Order Priority Codes (00/PR)

Use these codes to group work orders by priority, such as urgent or low. The system displays this classification code field on Enter Work Orders and Backlog Management.

Priority codes classify work orders by priority, such as H for high priority and 1 for emergency priority. These codes are for reference only and do not affect the scheduling or planning of work.

Work Order Status Codes (00/SS)

Use these codes to group work orders by current condition. You can update the status code for a work order as work progresses. The system displays this classification code field on a variety of forms related to the life cycle of a work order, such as Work With Work Orders and Work Order Details.

Status codes classify work orders by current status in the work order life cycle, such as A for approved and AP for approval pending. You can update the status code for a work order as work progresses.

Work Order Category Code 01 (00/W1)

Category code 01 is a special four-character user defined code that appears on all work order forms and reports. You can use category code 01 for the work order phase or matter codes. Use phase or matter codes to do the following:

- Group families of work orders into phases or subcategories for project management and cost account purposes
- Group families of work orders on invoices by special matter or explanation code

If you do not want to use category code 01 for phase and matter codes, you can modify the predefined codes or create new ones.

Phase or matter codes indicate the implementation phase of the work order, such as 2 for project phase 2. You can use phase codes to group work orders for project management and cost accounting purposes.

Additional Work Order Category Codes (00/W2 - W0)

Use category codes 02-10 to customize and further define your work orders. Category codes 02-10 have no predefined values; they can represent any category or description by which you want to group work orders. For example, you can set up one category code to represent types of problems encountered in the work order process, such as improper installation or design flaws. Another code might represent locations where work is taking place.

The system displays the first ten category codes on Backlog Management. You can set up these codes to help you limit your search for work orders on Backlog Management.

For example, you can set up category code 2 as a work order failure code to indicate reasons for equipment failure. You could then set up codes to indicate equipment failure due to the following:

- Operator error
- Design flaw
- Lubrication or cooling problem

Work Order Detail Specs. Codes (00/RT)

Use work order detail specifications codes to organize the descriptive information that you enter and track for your work orders. Work order detail specs codes organize the descriptive information that you enter for your work orders, such as S for safety provisions and E for equipment downtime. For example, you might set up work order detail specifications to include the following types of information:

- Tool and equipment instructions
- Safety provisions
- Equipment downtime

See *Entering Record Type Descriptions* for information about assigning record types to work orders.

Work Order Databases (00/WD)

Work order databases group supplemental data types for work orders, such as E for engineering change orders.

See *Setting Up Supplemental Data Types* for more information.

Setting Up Standard Procedures for Work Orders

You can set up codes and text to describe standard procedures for your work orders. For example, you can:

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

For example, you might set up a code called 1000 for a 1000-hour maintenance inspection. For the 1000 code, you can enter text to describe procedures, such as checking coolant levels and adjusting belt tension.

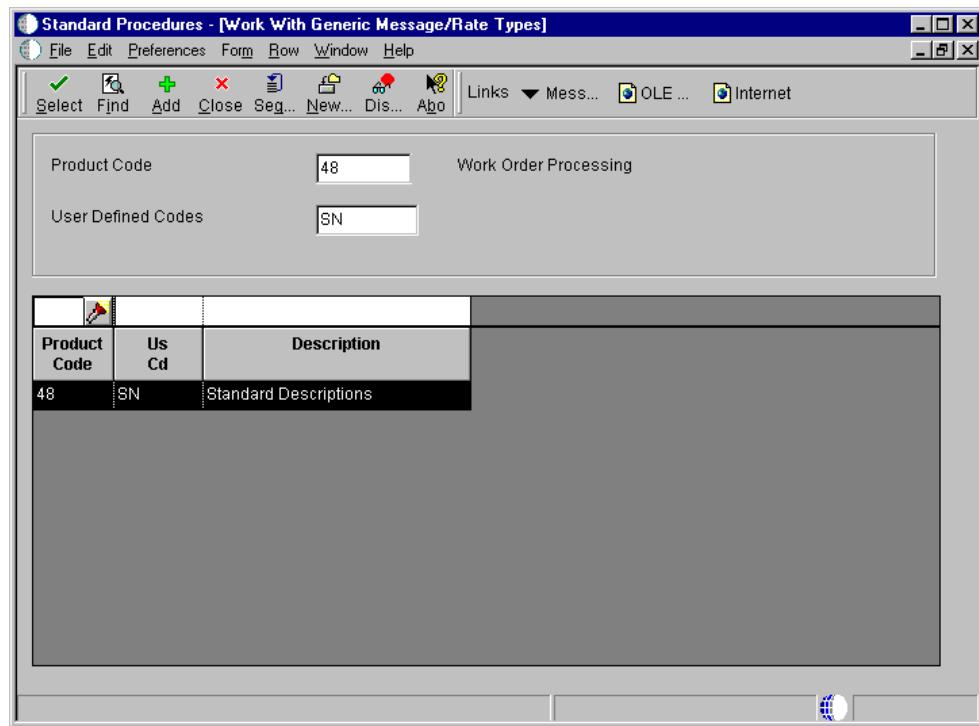
To avoid retying similar procedures for every work order, you can also copy the appropriate message text from another procedure.

After you set up standard procedures, you can assign them to the appropriate work orders.

► To set up standard procedures

From the Work OrderSetup menu (G4841), choose Standard Procedures.

1. On Work With Generic Message/Rate Types, type 48 in the following field:
 - Product Code
2. Type SN in the following field and click Find:
 - User Defined Codes
3. Choose the Standard Descriptions record and choose Message/Rates from the Row menu.



4. On Enter Generic Message/Rates, in a blank row, complete the following fields:
 - User Defined Codes
 - Description
5. Choose the row that you entered and then choose General Message from the Row menu.

The screenshot shows a PeopleSoft application window titled "Enter Generic Message/Rates". At the top, there's a toolbar with buttons for OK, Find, Delete, Cancel, Form, Row, and Tools. Below the toolbar, the product code "48" is set to "Work Order Processing" and the user defined code "SN" is listed. The main area contains a table with columns "Code" and "Description". One row is selected, showing "01-405" and "Overhaul Motor". Other rows include "1000 hour maintenance steps", "General Assembly Procedure", "Quality Control General Proc", "250 hour maintenance steps", "500 hour maintenance steps", "CHECKLIST Maintenance Checklist", "LOCKOUT Lockout / Tagout Procedure", and "VEHICLE General Work On Vehicle".

6. To enter new message text, in a blank row, complete the following field with a description of the standard procedure:
7. Click OK and go to Step 12.
8. To copy message text from another procedure, choose Search from the Row menu on the General Message form.
9. On Standard Text Search, complete any of the following fields and click Find:
10. Choose the rows of text to copy and click Select.
The text that you selected to copy appears on the General Message form.
11. On General Message, click OK.
The system adds the message text to the standard procedure code.
12. On Enter Generic Message/Rates, click OK.
If you need to change message text for a standard procedure code, you can type over the existing text.

Processing Options for Standard Procedures (P00191)

Defaults

1. Enter the desired System Code.

System Code

2. Enter the desired Record Type.

Tax Authority 5

Record Type

Display

1. Enter a '1' to display Rate Text or a '2' to display Message Text.

Text Type

2. Enter a '1' for 60 column display or a '2' for 80 column display.

Text Column Display

Setting Up Default Managers and Supervisors

You can set up address book information for managers and supervisors to appear by default on work orders. This default information is based on any combination of the first three work order category codes that appear on the Work Order Entry and the Scheduling Workbench forms. The system automatically enters address book values in the following fields:

- ANPA (Supervisor)
- ANSA (Manager)

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

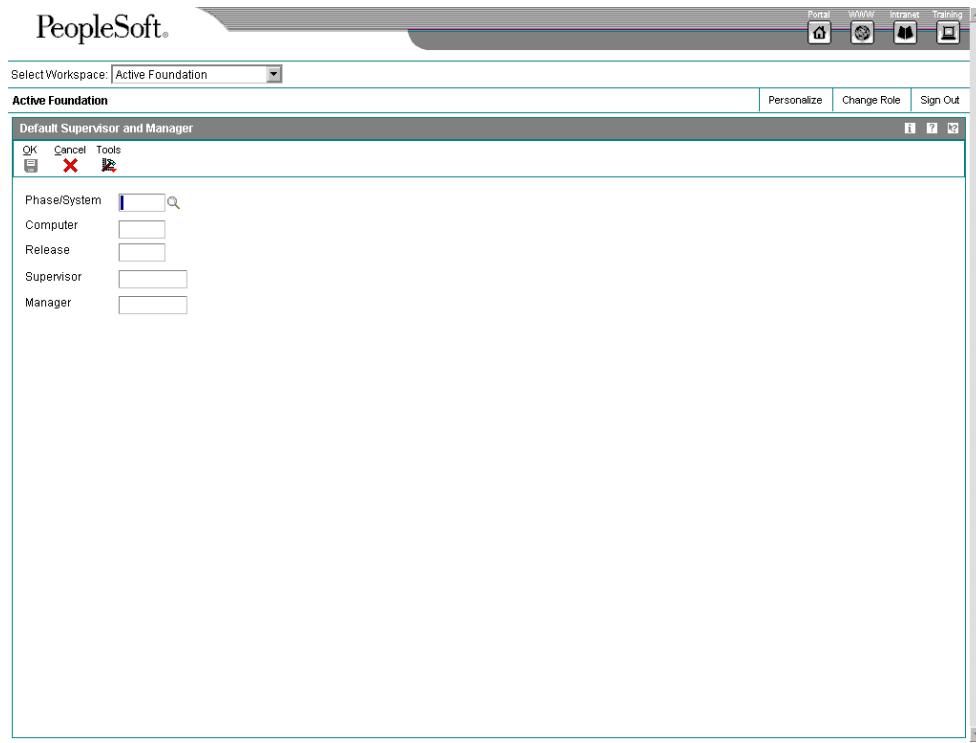
Before You Begin

- Set the processing options on Enter Work Orders and Project Setup to use default values for the manager and supervisor address book numbers.

► To set up default managers and supervisors

From the Work Order Setup menu (G4841), choose Work With Work Order Default Codes.

1. On Work With Work Order Default Codes, click Add.



2. On Default Supervisor and Manager, complete any combination of the following fields:
 - Phase/System
 - Computer
3. To indicate which supervisor and manager are responsible, complete the following fields:

Note

You must complete at least one category code field and one manager or supervisor field in order to set up the default information.

Setting Up Approvals for Work Orders

You can control approvals for work orders by establishing activity rules and approval routing and setting up user profiles.

Use activity rules to specify the status of a work order at any point in the life cycle. Use approval routing to notify individuals when a work order requires his or her approval. You must set up user profiles for all individuals who are designated to approve work orders.

Setting Up Activity Rules for Work Orders

For work orders, use activity rules to:

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

You can define activity rules that differ by document type (such as engineering change orders) and classification (such as rework orders).

You must set up a reject code as the last status for any set of activity rules that use an approval process.

► To set up activity rules for work orders

From the Work Order Setup menu (G4841), choose Work Order Activity Rules.

1. On Work With Work Order Activity Rules, click Add.

WO Status	WO Status Description	Next Status	Allowed Status 1	Allowed Status 2	Allowed Status 3	Allowed Status 4	Allowed Status 5	Subledger Inactive	Maint. Status	Lock Flag	Edit Author
<input checked="" type="checkbox"/>	M*	MVO Waiting Manager Approval	MA	ME	MG	MI	MR				
<input checked="" type="checkbox"/>	MA	MVO Approved	MB	MD	ME	MI	MM				
<input checked="" type="checkbox"/>	MB	MVO Material Issued	MG	MH	MJ	MM					
<input checked="" type="checkbox"/>	MC	W/O In Planning	ME	MF	MG	MI	MJ	MM			
<input checked="" type="checkbox"/>	MD	W/O Plant Shutdown	ME	MF	MG	MI	MJ	MM			
<input checked="" type="checkbox"/>	ME	W/O Waiting for Parts	MF	MG	MH	MJ	MM				
<input checked="" type="checkbox"/>	MF	W/O Parts Staged and Ready	MG	MH	MJ						
<input checked="" type="checkbox"/>	MG	W/O Ready to Schedule	MH	MJ							
<input checked="" type="checkbox"/>	MH	W/O Issued & Released	MJ								

2. On Work Order Activity Rules, complete the following fields:

- Order Type

This user defined code identifies the document type and determines how transactions are processed by the general ledger.

- WO Type

This user defined code classifies work orders, such as maintenance work orders.

3. To define the activity rules for this classification of work orders, complete any of the following fields:

- WO Status
- Next Status
- Allowed Status 1
- Allowed Status 2
- Allowed Status 3
- Allowed Status 4
- Allowed Status 5

Note that each row accounts for a specific rule.

You must set up status codes for work orders on Work Order Activity Rules before you can use them in the Next Status field or Allowed Status fields.

Caution

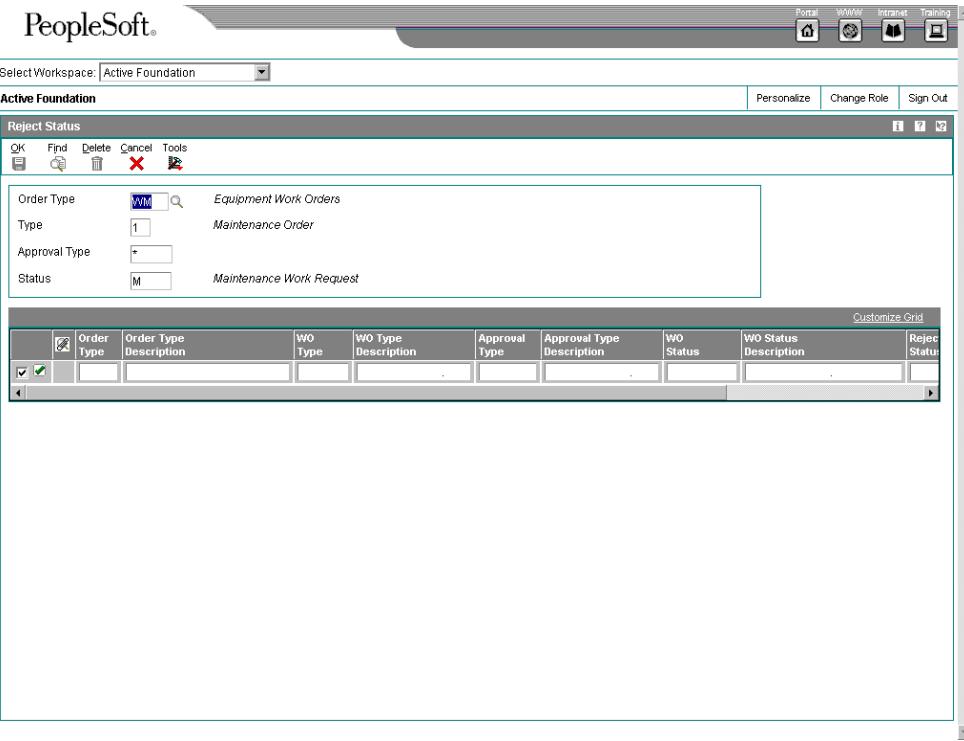
On Work Order Activity Rules, do not delete a status code that you have also defined as a next status or other allowed status.

4. For each rule that you defined, complete the following optional fields:

- Subledger Inactive
 - Maint. Status
- Maintenance Status is only used for equipment.
- Lock Flag

5. To assign a reject status to a rule, choose the appropriate rule, and then choose Reject Status from the Row menu.

Note that reject status is necessary only if you will use an approval process.



6. On Reject Status, complete the following field and click OK:
7. Click OK again.
8. On Work Order Activity Rules, click OK.

Setting Up Approval Routes for Work Orders

You can use address book numbers to create various approval routes for individuals who need to be notified when a work order requires his or her approval. You can also establish specific approval routes based on approval type and monetary amount. You can also establish specific approval routes based on the following:

- Organizational structure
- Work order amount

► To set up approval routes for work orders

From the Workflow Management Setup menu (G0241), choose Group Revisions.

1. On Work With Distribution Lists, click Add.

2. On Address Parent/Child Revisions, complete the following field to define the characteristics of the approval route:
 - Parent Number
3. Type WFS in the following field:
 - Structure Type
4. Type AMTO in the following field:
 - Associated Data Item
5. Click any of the following options:
 - First Response
 - Higher Level Override
 - Authorization Required
6. For each approver in the route, complete the following fields:
7. Complete the following optional fields for each approver and click OK:

Processing Options for Group Revisions (P02150)

Defaults

- 1.) Enter the default Structure Type
 - 2.) Enter the Version of Organizational Structure Revisions to call. If left blank version ZJDE0001 will be used.
-

Setting Up User Profiles

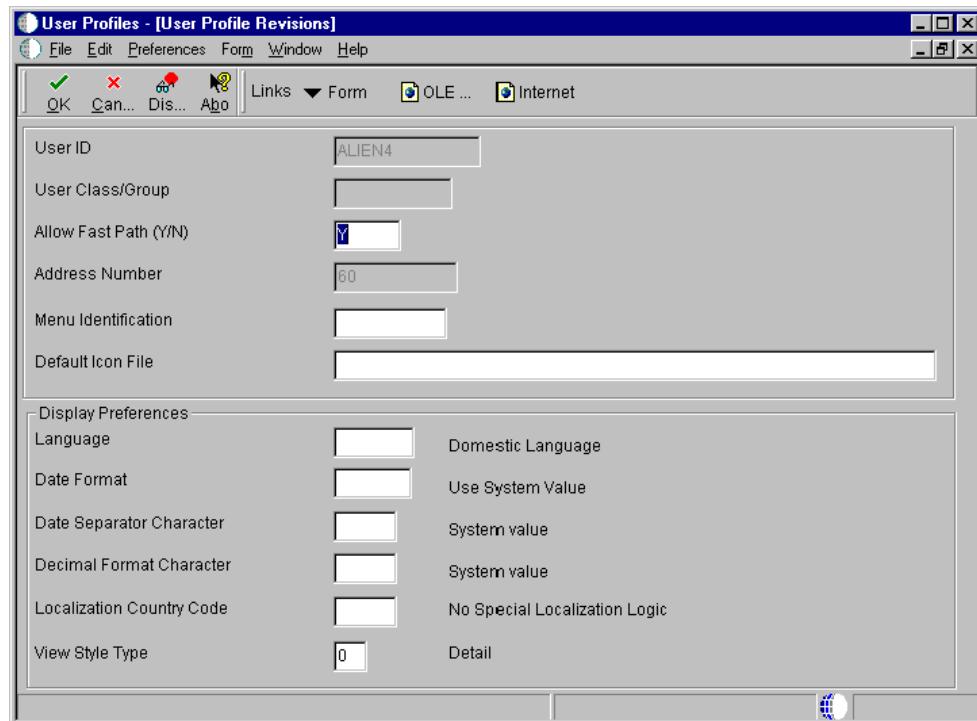
You must set up user profiles for all individuals who are designated to approve work orders. When an approver enters a password to complete the approval process, the system validates the password against the employee address book number that you set up in the approver's user profile. The system uses the User ID number to verify that the address book number is valid for the approver.

The system uses the approver's address book number to send electronic mail messages associated with work order approvals and to define the work order approval routing .

► To set up user profiles

From the System Administration Tools menu (GH9011), choose User Profiles.

1. On Work With User Profiles, to locate a user, click Find to select from a list, or complete the following field and click Find:
 - User ID
2. Choose the appropriate user and click Select.



3. On User Profile Revisions, complete any of the appropriate fields and click OK.

Processing Options for User Profile Revisions (P0092)

A/B Validation

Enter a '1' to enable editing on address book number against the F0101.

Enter a '1' to require the System Role field to be populated.

Setting Up Formats for Record Types

You use record types to organize the detail information that you track for work orders. For example, you can organize information such as original task description, tools required, and safety provisions.

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

- Setup
- Production
- Teardown and cleanup

When you use the format for text plus three columns, you must specify at least one of the column headings. Formats that are all text do not include headings. If you specify even one column heading for a record type, the system changes the format to text plus three columns. If you change the format of a record type after you've assigned it to one or more work orders, the system updates the format of that record type for all work orders.

You can review record types, formats, and column headings by choosing Record Types from Work With Work Orders or Record Type Review from Work Order Details.

Note

You must set up the following record types for Equipment/Plant Management:

- Maintenance Loops
 - Associated preventive maintenance
-

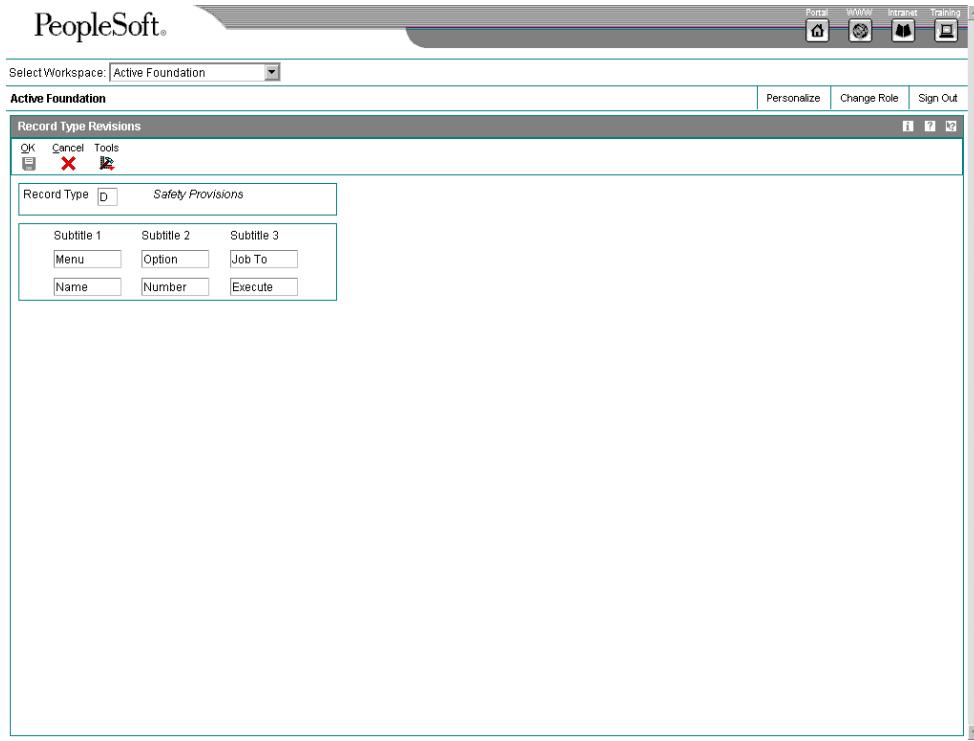
Before You Begin

- Set up work order record types. See *Understanding User Defined Codes* for more information about setting up work order record types.

► To set up formats for record types

From the Work Order Setup menu (G4841), choose Detail Spec. (Specifications) Over Titles.

1. On Work With Record Types, click Add.



2. On Record Type Revisions, complete the following field:
3. To define text for column headings, complete the following fields and click OK:

Setting Up Supplemental Data for Work Orders

You can enter supplemental data to further define the work orders in your system. Such supplemental data is useful for reporting and tracking work order details that are not included in the record types, such as safety procedures.

You set up and maintain supplemental data by work order database. Work order databases are user defined codes (00/WD). For example, you might set up supplemental data for an engineering change order database. The data types might include detail types, pending orders, and so on. You can set up your system to validate the values that you enter on supplemental data forms against the values that you set up in user defined code tables.

If your specification data type does not relate to an existing user defined code or generic message code, you can set up a new user defined code table. J.D. Edwards recommends that you use systems 55 through 59, inclusive, to set up the new tables. User defined code tables that you set up for these systems are not modified during any reinstall processes.

Before You Begin

- Set up a user defined codes table for work order databases for supplemental data.
See *Understanding User Defined Codes*.

See Also

- Customizing User Defined Codes* in the *OneWorld Foundation* documentation for information about setting up user defined code tables

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

From the Work Orders Setup menu (G4841), choose Supplemental Data Setup.

1. On Work With Supplemental Database Setup, click Find.
2. Choose the appropriate database (such as WO, Work Order) and choose Work With Data Types from the Row menu.
3. On Work With Data Types, click Add.

The screenshot shows the 'Data Type Revisions' window in PeopleSoft. At the top, there are buttons for OK, Cancel, Form, and Tools. Below that, there are fields for 'SDB Code' (set to 'WO'), 'Display Mode' (set to 'C'), 'Type Data', 'Description', and 'Search Type'. A 'UDC Headings/Validation' section contains fields for 'UDC' and 'Product Code'. Another section, 'Remark Headings/Validation', contains fields for 'Remark 1' and 'System Code', and 'Remark 2' and 'System Code'. To the right, a 'Column Headings' section lists fields: 'Amount 1', 'Amount 2', 'Quantity', 'Effective From', 'Effective Thru', 'User Date', 'User Days', 'User Address', and 'User Document'. The 'Amount 1' field is highlighted with a red border.

4. On Data Type Revisions, complete the following fields:
 - Display Mode
Enter C, O, or N as appropriate.
 - Type Data
5. Complete the following optional fields:
 - Display Sequence
 - Data Class
 - Search Type
6. In the UDC Headings/Validation section, complete the following fields as needed:

- UDC
- Product Code
- Record Type

7. In the Remark Headings/Validation section, complete the following fields as needed:

- Remark 1
- System Code
- Record Type
- Remark 2
- System Code
- Record Type

8. In the Column Headings section, complete the following fields as needed:

- Amount 1

Setting Up Accounting Rules for Work Orders

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

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

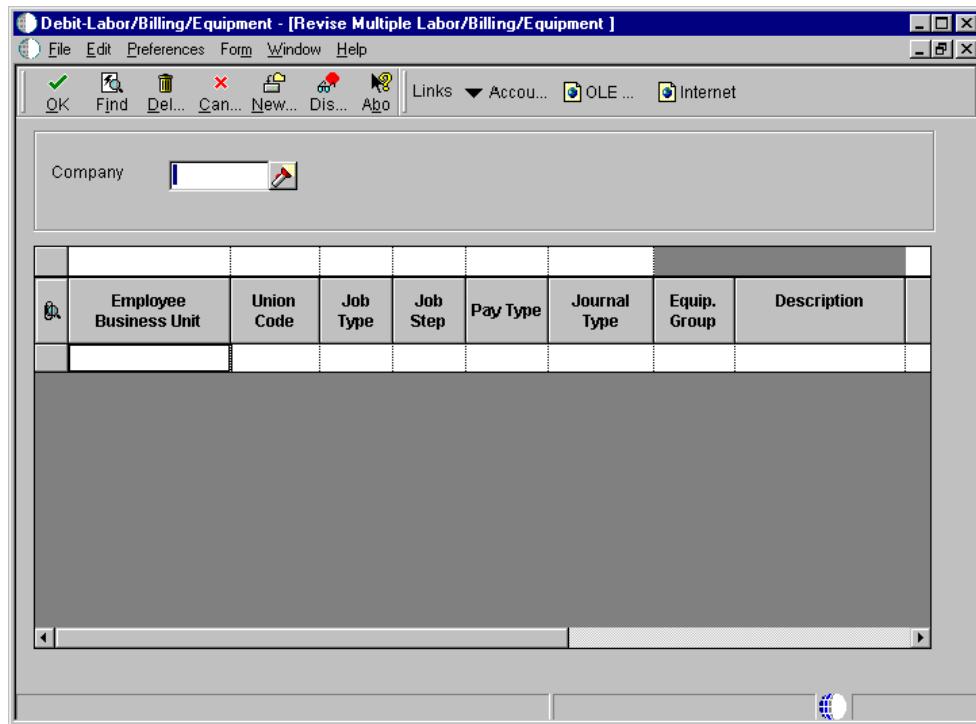
Before You Begin

- Verify that you have installed at least one of the following systems:
- HR and Payroll Foundation (system 05)
 - Stand-alone Time Accounting (system 05T)
 - Payroll (system 07)
 - Payroll (Canadian system 77)

► To set up the accounting rules for work orders

On the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit-Labor/Billing/Equipment.

1. On Work With Accounting JE Rules - Labor/Billing/Equipment, click Add.



2. On Revise Multiple Labor/Billing/Equipment, complete the following fields:

- Company
- Journal Type
- Object Account

3. Complete the remaining optional fields as needed and click OK.

Advanced & Technical

Global Updates

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

Updating the Phase and Equipment Number

From the Advanced & Technical Operations menu (G4831), choose Update Phase/Equip No. in G/L.

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

When you select this update program, the system submits the job directly to batch processing.

Before You Begin

- Back up the Work Order Master File table (F4801). See *Backing Up OneWorld Tables* in the *Server and Workstation Administration* documentation.
- Communicate to the users that no one accesses or modifies the Work Order Master File while you run this procedure.

See Also

- Creating a Workflow Process* in the *Enterprise Workflow Management Guide*

Purging Closed Work Orders

From the Advanced & Technical Operations menu (G4831), choose Work Order Purge.

Alternatively, from the Shop Floor Management Advanced menu (G3131), choose Purge Orders.

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

The Work Order Purge program deletes the work order records that you specify, including any associated record types and approval records. The program does not create a purge table or a report.

When you run the Work Order Purge program, you use data selection to specify which work orders to purge from the Work Order Master File table (F4801). In addition, the system purges related information from the following tables for the work orders that you select:

- Work Order Instructions File (F4802)
- Work Order Parts List (F3111)

- Work Order Routing (F3112)
- Work Order Time Transactions (F31122) that are not used by Equipment/Plant Management

You can use a processing option to save purged work order information in a special purge library.

Appendices

Workflow Concepts and Setup

This appendix contains important conceptual and setup information regarding the integration of Workflow Management and Work Orders. For a comprehensive overview of Workflow Management, refer to the *Enterprise Workflow Management* documentation.

Workflow Management for Work Orders

Workflow Management offers a powerful means of automating various components of the work order life cycle across your entire enterprise. Documents, information, and tasks pass efficiently from one participant to another for action, based on a set of procedural rules and triggering events, and requiring minimal user involvement. For example, you can use workflow to do the following:

- Route a work order for approval
- Commit inventory to a work order
- Run the capacity plan for a work order
- Send messages to appropriate personnel regarding the progress of a work order

In addition, Workflow Management enables you to do the following:

- Define any number of workflow processes, according to your business needs
- Attach any workflow process to any given event within an application
- Execute conditional processing, which is logic that is dependent upon supplied criteria, such as currency amount, status, and priority

Terms and Concepts

You do not need a comprehensive knowledge of the Enterprise Workflow Management system to set up and use Workflow Management, but you must be familiar with the following terms and concepts:

Routes	Routes define the path along which the Workflow system moves a work order. Depending on your needs, a route can be relatively simple and sequential, or increasingly complex, with joins or splits, parallel routing, iterative routing (such as a loop), and so on.
Process rules	<p>Process rules define what information is to be routed and to whom. For example, you can set up rules that define conditions that a work order must meet before the Workflow Management system advances the order to the next activity in the process, as well as rules that govern who receives an approval request. Workflow Management uses the following process rules:</p> <ul style="list-style-type: none"> Activity conditions determine the next activity, based on information that you set up in an attribute data structure, such as work order status. Recipient rules determine the recipient to whom the system routes messages. <p>As with routes, you determine the complexity of rules according to your needs. For example, you can set up logic by which a work order can only progress to the next step if predefined threshold values have been met.</p>
Workflow processes	<p>Workflow processes refer to processes that you have set up to be handled through scripted workflow. For each process that you define, you can do the following:</p> <ul style="list-style-type: none"> Set up criteria that indicates the start and end of the process. Determine the workflow activities involved in the process, such as sending an approval message, calling an application, or launching a sub-process. Determine the relevant data that the system requires to complete the process. Determine the path, such as an approval route, that a process takes, and whether the process is dependent upon some conditional value, such as work order status, amount, or date. Activity conditions determine the next workflow activity in the process. <p>You can set up a hierarchy of processes, creating nested sub-processes so that one process calls another. This procedure is especially useful when you need to reuse components within other processes. For example, the initial workflow process for work orders determines the document type of the work order and calls other processes that are based on the document type, such as the process to determine the work order type.</p> <p>For more information about Workflow processes, see Considerations for Setting Up Workflow Processes elsewhere in this appendix.</p>
Workflow activities	<p>Workflow activities refer to the specific actions within a given process, such as sending a request for approval or committing inventory. In addition to the Start activity, which every process must include, you can attach other types of activities to a process, as follows:</p> <ul style="list-style-type: none"> Function Interactive application Batch application Run executable Message Halt process Process <p>For a more detailed description of each type of activity, see Considerations for Setting Up Workflow Activities elsewhere in this appendix.</p>
Primary data structures	The primary data structure contains the data that makes an instance of a process unique from another instance. In Work Orders, where workflow processes are set up primarily for events in the work order life cycle, the primary data structure typically consists of the work

order number.

J.D. Edwards strongly recommends that you do not use multiple data items within a data structure. Doing so might increase the possibility of system errors.

See [Setting Up Workflow Data Structures](#) in the Enterprise Workflow Management Guide for a complete explanation of primary data structures.

Attribute data structures	Attribute data structures contain all pieces of data that a given process and any activity within the process need to complete the flow. Workflow Management uses the attribute data structure to communicate between activities within a process.
----------------------------------	--

Workflow Setup Considerations for Work Orders

This section provides important setup considerations and requirements to be aware of when you set up Workflow Management for Work Orders. Use the information in this section in conjunction with the *Enterprise Workflow Management Guide*. It is beyond the scope of this appendix to provide detailed setup procedures for Enterprise Workflow Management.

This section includes the following setup topics relevant to scripted workflow:

- Considerations for setting up workflow processes
- Considerations for setting up workflow activities
- Considerations for adding process rules

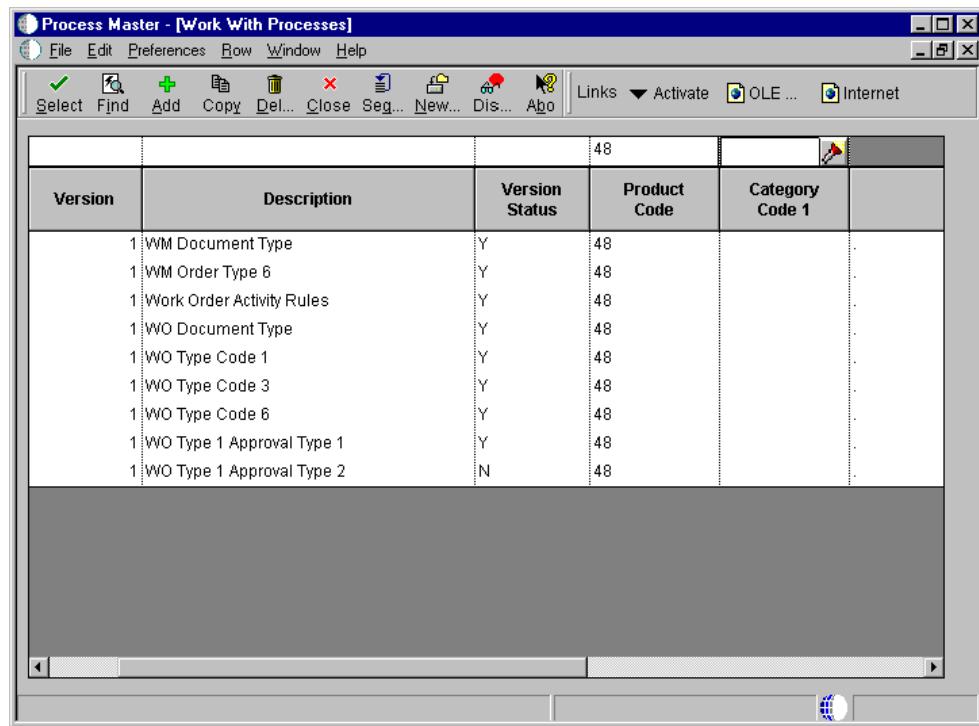
For any given setup task, J.D. Edwards provides demonstration data. You can use the data provided or customize it to meet your needs.

Considerations for Setting Up Workflow Processes

A workflow process contains activities and related sub-processes specific to a particular function that you want to automate through Workflow Management. J.D. Edwards provides the Work Orders system with predefined workflow processes that are specific to the work order life cycle. You can modify or add to these processes, if necessary. Typically, you need to customize workflow processes to meet the needs of your organization. An example of a predefined process for Work Orders is the process for Work Order Approval.

You can have multiple versions of a workflow process. However, the system allows only one version of a process to be activated at a time. You specify whether a version is activated by choosing the version on Work With Processes, and then choosing either Activate or Deactivate from the Row menu.

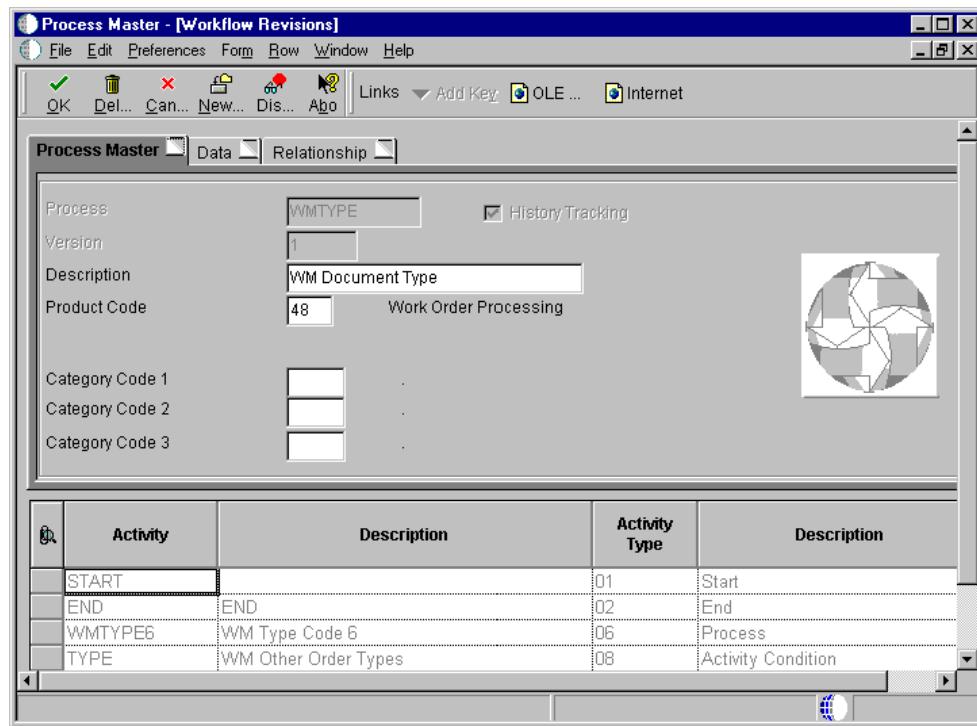
Work With Processes Form



From the Workflow Management Setup menu (G0241), choose Process Master.

On the Work With Processes form, you can search for predefined processes or add new processes.

Workflow Revisions Form, Process Master Tab



From the Work With Processes form, click Find, choose a process, and click Select or Add.

On the Process Master tab of the Workflow Revisions form, you can revise existing workflow processes or add new ones.

Considerations for Setting Up Workflow Activities

After you have set up workflow processes, you can add an unlimited number of activities to a process, choosing from the following types of predefined activities:

Function	This activity attaches a function for special logic processing, including any business functions that you write to perform a special function or operation.
Interactive application	This activity starts an interactive application. You can specify any interactive application to be called. You also define the parameters that are passed to the called application.
Batch application	This activity starts a batch application. You can launch any report or batch process at this point.
Run executable	This activity launches an executable program that you specify, such as a word processing application or a spreadsheet application.
Message	This activity generates a message. You define the messages in the Data Dictionary and set up variables regarding the delivery of the messages within Workflow Management. For example, you can specify that particular messages be sent to a distribution list, a specific person, or a specific mailbox.
Halt process	This activity stops the process for a period of time that you specify, after which the process resumes. If you do not specify a time, you must restart the process manually.
Process	This activity starts another process, also called a sub-process, which includes its own set of activities. You use the process activity to set up a hierarchy of processes, nesting them wherever appropriate.

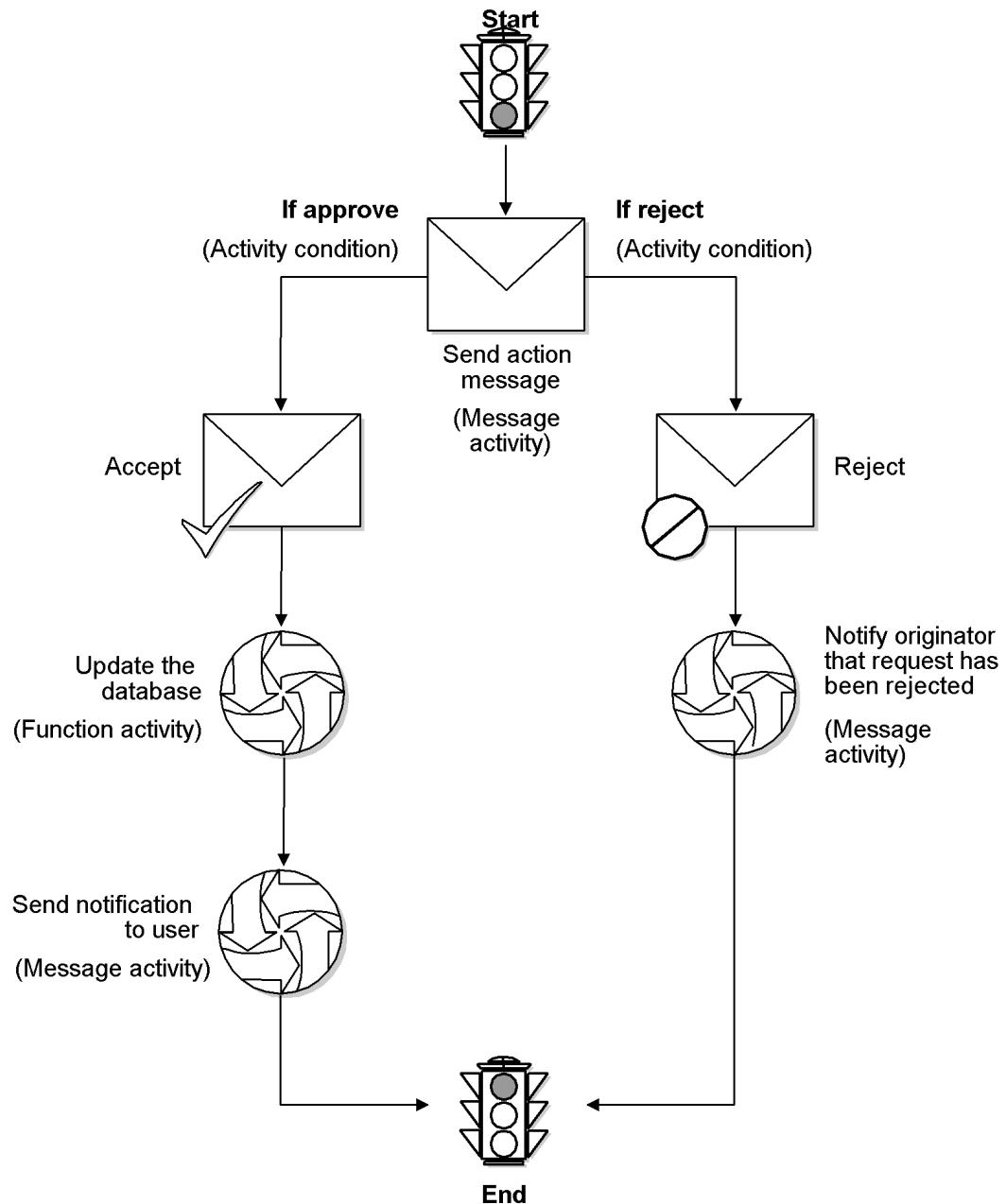
In addition to the activities described above, each workflow process must begin with the Start activity. By default, whenever you set up a process and attach a Start activity, the system attaches the end activity.

A typical workflow process (in this case, an approval process) with various types of activities attached is as follows:

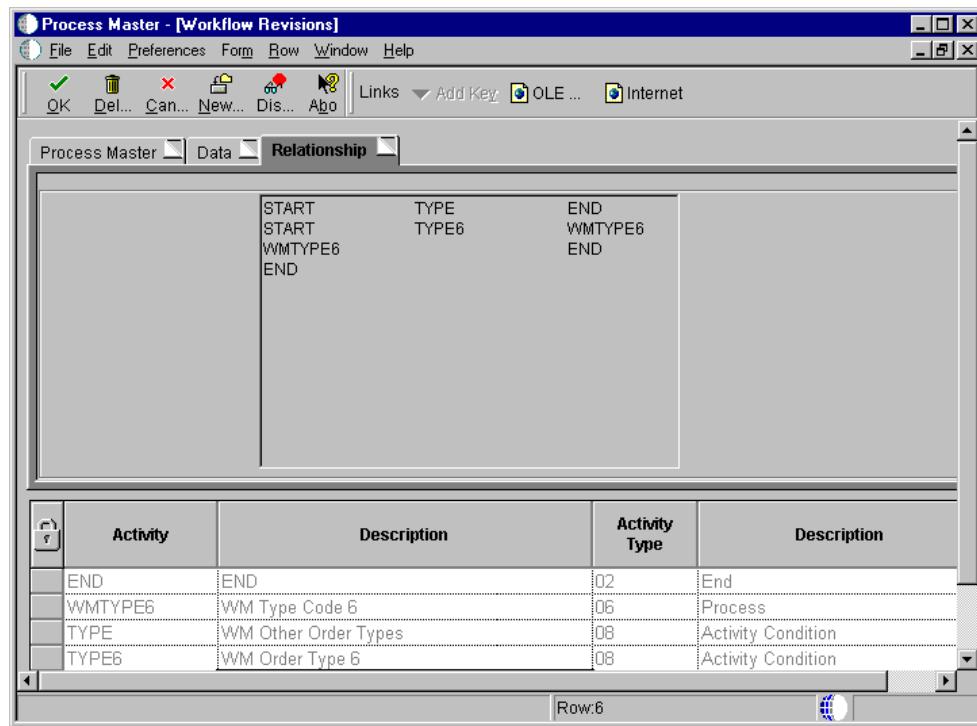
- Send a message to the approver's queue
- If approved:
 - Update the database
 - Send notification to user
- If rejected:
 - Send notification back to the originator
- End process

The following graphic illustrates a typical approval workflow process:

A Workflow Process



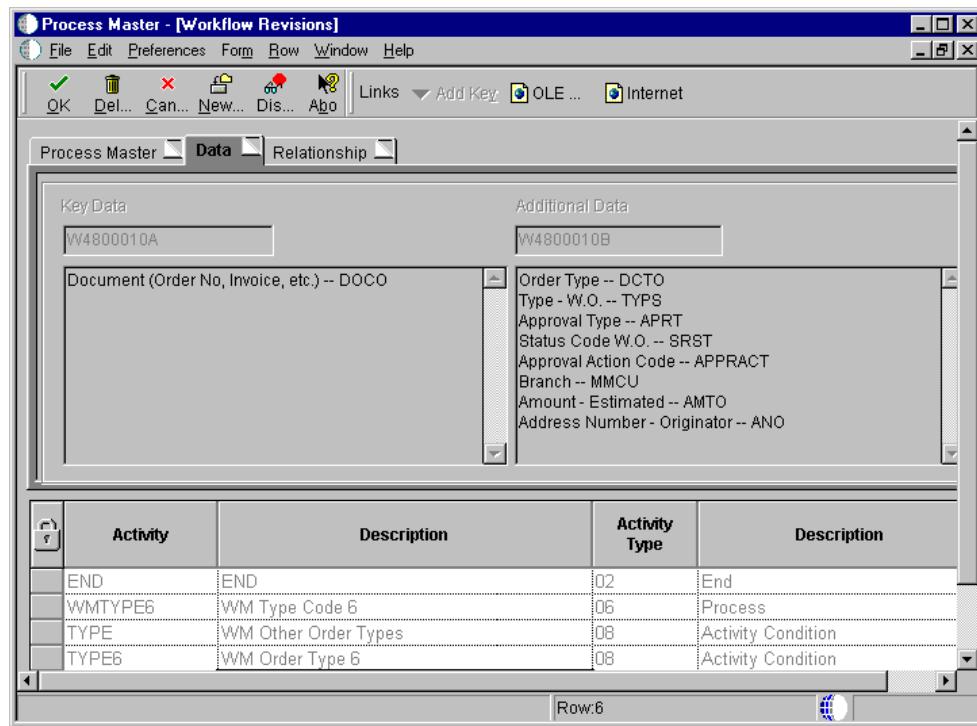
Workflow Revisions Form, Relationship Tab



From the Work With Processes form, choose a process, click Find, and click Select or Add.

On the Relationship tab of the Workflow Revisions form, you can review all of the activities that are currently attached to a particular process.

Workflow Revisions Form, Data Tab



Note

Before you can revise an existing activity, you must deactivate the activity. Choose Deactivate from the Row menu on the Work With Processes form.

From the Work With Processes form, click Find, choose a process, and click Select or Add.

On the Data tab of the Workflow Revisions form, you can review all of the data fields that are currently attached to a particular process.

See Also

- Adding Activities to a Process* in the *Enterprise Workflow Management* documentation for more information about setup requirements for different activity types

Considerations for Adding Process Rules

After you have set up and attached activities to a workflow process, you must add process rules. Process rules are user-defined and determine the conditions that must be met for Workflow Management to progress from activity to activity. The types of process rules are as follows:

Activity Conditions	Activity conditions determine which activity that the system executes and the result of that activity. For example, a condition set up for an approval activity might change the status of a work order if the work order is approved or send a rejection message to the originator if the work order is rejected.
Recipient Rules	Recipient rules determine to whom an activity is routed. You can add logic to a recipient rule, based on the structure of your organization. For example, you can specify that the system send messages to a particular distribution list when the approval type is 1 and another distribution list when the approval type is 2.

See Also

- Adding Activity Conditions and Working With Recipient Rules* in the *Enterprise Workflow Management* documentation

Example: Work Order Approval Process

The following example shows how the various components of workflow management, such as processes, sub-processes, and activities, work together to provide a comprehensive workflow solution. The work order approval process represents a typical workflow process within Work Orders. By reviewing the example, you can determine the particular workflow components that require modification to meet your business needs.

In this example, the approval process for a work order differs, based on the document type and the work order type. Document type and work order type are elements of the attribute data structure that you must set up in order to use Workflow Management for approving work orders. The example charts the workflow for a work order with a document type of WO and a work order type of Type 1. Since document types and work order types are user defined codes, the codes that your organization uses will likely differ from the codes provided by J.D. Edwards in demo data.

In the example, the workflow process is initially triggered by the creation of a work order or any change made to the status of a work order. The system uses Work Order Activity Rules to determine if the status change is allowed. If the status change is not allowed, workflow does not begin and an error message appears. Otherwise, workflow begins normally. Regardless of any subsequent processes, the first workflow process for work orders is the WOACTRULES (Work Order Activity Rules) process. This process is hard-coded and cannot be modified.

