PeopleSoft.

EnterpriseOne Xe
Work Orders
PeopleBook

September 2000

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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.

Overviews consists of the following:

❏ Industry Overview

❏ Work Orders Overview

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 (e.g., 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

OneWorld manages all of these through the Work Order system.

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 Control, 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 parts and materials that are required to complete a work order task?	You can attach a list of parts and materials to any work order. The list provides information for parts and materials to be committed or issued from inventory. You can generate purchase orders directly from the list that is attached to the work order.
	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.
What types of information can I print on work orders?	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.
	The Work Order system provides online and printed information that workers can use to help eliminate errors.
How can I reuse past work order information?	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.
	Using a parent work order reduces labor costs and provides consistency between similar work orders and tasks.

To access English documentation updates, see
https://knowledge.jdedwards.com/JDEContent/documentationcbt/overview/about_documentation_updates.pdf

How do I ensure that an approval process for work orders exists?

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.

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.

How do I control and track a work order's progress?

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.

Can I associate work orders with a project?

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.

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.

How can I track work orders?

You can track work orders in many ways, such as by:

- 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.

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
- Payroll and Time Accounting
- Inventory Management
- Procurement
- Accounts Payable
- Equipment/Plant Maintenance *
- Job Cost
- Service Billing

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

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.

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

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)

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

Advanced and Technical Operations (G4831)

- Update Phase/Equip No. in GL (R48802)
- Work Order Purge (R48900)
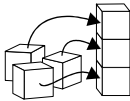
Work Orders Setup (G4841)

- 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. By creating a work order, you also communicate important information about a task or 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.

Work order creation consists of the following tasks:

❏ Creating work orders

❏ Copying parent work orders

❏ Creating work orders for a project

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, inactivate 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.

Creating work orders consists of the following tasks:

❑ Entering basic work order information

❑ Entering record type descriptions

❑ Working with supplemental data

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. Or you can include a variety of explanations, scheduling dates, and control codes. You can also enter budgeting information to help you track costs and resources.

▶ **To enter basic work order information**

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 it 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.

6. 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

7. Click the Classification tab.

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

Field	Explanation
Charge to BU	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant.
	Business unit security can prevent you from locating business units for which you have no authority.
	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant.
	Business unit security can prevent you from locating business units for which you have no authority.
Status Comment	A brief description to explain the status of the work order.
Search X–Ref	An alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.
W.O. Status	A user defined code (00/SS) that describes the status of a work order, rate schedule, or engineering change order. Any status change from 90 through 99 triggers the system to automatically update the date completed.
Type	A user defined code (00/TY) that indicates the classification of a work order or engineering change order.
	You can use work order type as a selection criterion for work order approvals.
Priority	A user defined code (00/PR) that indicates the relative priority of a work order or engineering change order in relation to other orders.
	A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work order you create on those forms and on the Project Setup form. You can either accept or override the default value.
Std. Description	A generic rates and message code (48/SN) that is assigned to a standard note, message, or general narrative explanation. You can use this code to add instructional information to a work order. You set up codes for this field on the Generic Message/Rate Types table (F00191).
Flash Message	A user defined code (00/WM) that indicates a change in the status of a work order. The system indicates a changed work order with an asterisk in the appropriate report or inquiry form field. The system highlights the flash message in the Description field of the work order.

Field	Explanation
Subledger Inact	A code in WorldSoftware or an option in OneWorld that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive. Examples are jobs that are closed, employees that have been terminated, or assets that have been disposed. If a subledger becomes active again, set this field back to blank. If you want to use subledger information in the tables for reports but want to prevent transactions from posting to the master record, enter a value other than blank in this field.
Parent Number	A number that identifies the parent work order. You can use this number to do the following: • Enter default values for new work orders, such as Type, Priority, Status, and Manager • Group work orders for project setup and reporting . . . . *Form-specific information* . . . . You can copy information from a parent work order to create a new work order. On the new work order, you need to complete some fields that require unique information. If you leave the remaining fields blank, the system completes them with values from the parent work order.
Cost Code	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.
Est. Hours	The estimated hours that are budgeted for this work order.
Est. Amount	The estimated monetary amount that is budgeted for this work order.
Tax Expl Code	A user defined code (00/EX) that controls how a tax is assessed and distributed to the G/L revenue and expense accounts. A user defined code (00/EX) that controls how a tax is assessed and distributed to the G/L revenue and expense accounts.

Field	Explanation
Tax Rate/Area	A code that identifies a tax or geographic area that has common tax rates and tax distribution. You must define the tax/rate area to include the tax authorities (for example, state, county, city, rapid transit district, province, and so on) and their rates. In order for the codes to be valid, you must set them up in the Tax Rate/Area file.

A code that identifies a tax or geographic area that has common tax rates and tax distribution. You must define the tax/rate area to include the tax authorities (for example, state, county, city, rapid transit district, province, and so on) and their rates. In order for the codes to be valid, you must set them up in the Tax Rate/Area file. |
Planned Comp	The date that the work order or engineering change order is planned to be completed.
Date Assigned	The date the person responsible for the work order receives the work order.
Start Date	The start date for the work order or engineering change order. You can enter the date manually or let the system enter it for you. If the work order is associated with a parent work order, the system enters the start date from the parent work order. If there is no associated parent work order, the system enters the system date.
Transaction	The date that a specific order was entered into the system. The default value for this date is the system date.
Originator	The address number of the person who entered the work order. The system verifies this number against the Address Book.
Supervisor	The address book number of the supervisor.

Note: A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. Set up the default values on the default Managers and Supervisor form. The system will automatically display the information you specified on all work orders you create if the category code criterion is met. You can override the default value. |
| Customer | A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members. |

Field	Explanation
Manager	The address book number of a manager or planner.
	Note: A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. You set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the default information displays automatically on any work orders that you create if the category code criterion is met. You can either accept or override the default value.
Phase	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.
	Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
	Note: A processing option for the SAR Entry lets you enter a default value for this field. The value than displays automatically in the System Code field on the SAR Entry form when you add a new SAR. You can either accept or override the default value.
Category 02	A user defined code (00/W2) that indicates the type or category of a work order.
	Note: A processing option for some forms lets you enter a default value for this field. The system enters the default value automatically in the appropriate fields on any work orders that you create on those forms and on the Project Setup form. You can either accept or override the default value.
	Note: A processing option for the SAR Entry lets you enter a default value for this field. The value then displays automatically in the Computer field on the SAR Entry form when you add a new SAR. You can either accept or override the default value.

Field	Explanation
Category 03	A user defined code (00/W3) that indicates the type or category of the work order.
	Note: A processing option for some forms allows you to enter a default value for this field. The system enters the default value automatically in the appropriate fields on any work orders that you create on those forms and on the Project Setup form. You can either accept or override the default value.
	Note: A processing option for the SAR Entry lets you enter a default value or this field. The value then displays automatically in the Release To Fix field on the SAR Entry form when you add a new SAR. You can either accept or override the default value.
Category 04	A user defined code (00/W4) that indicates the type or category of the work order.
Category 05	A user defined code (00/W5) that indicates the type or category of the work order.
Status	A user defined code (00/W6) that indicates the status of the work order.
Service Type	A user defined code (00/W7) that indicates the service type for the work order.
Skill Type	A user defined code (00/W8) that indicates the type or category of the work order.
Experience Level	A user defined code (00/W9) that indicates the type or category of the work order.
Category 10	A user defined code (00/W0) that indicates the type or category of the work order.

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.

See Also

- *Setting Up Formats for Record Types*

▶ **To enter record type descriptions**

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

1. On Work With Work Orders, complete any of the following fields to locate a work order and 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.
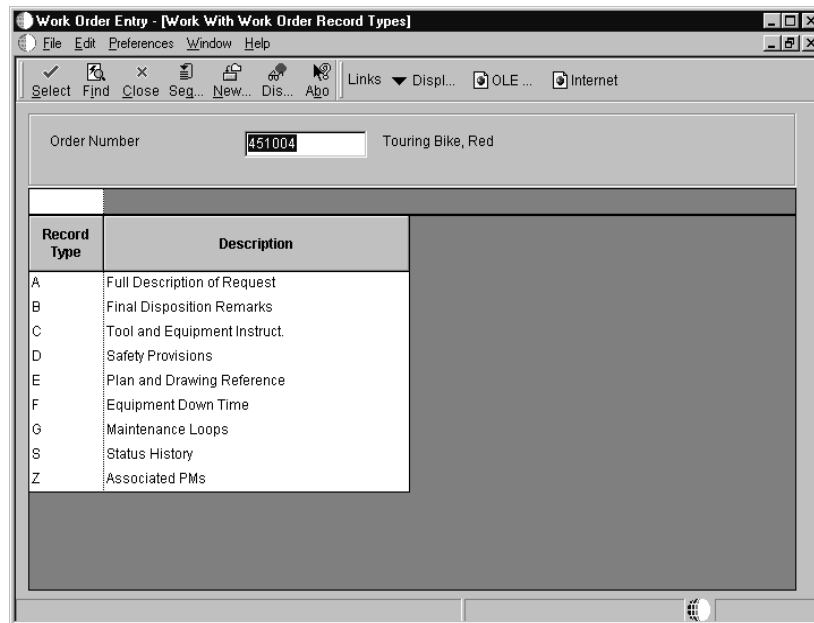
3. On Work With Work Order Record Types, complete the following field and click Select:

    • Record Type
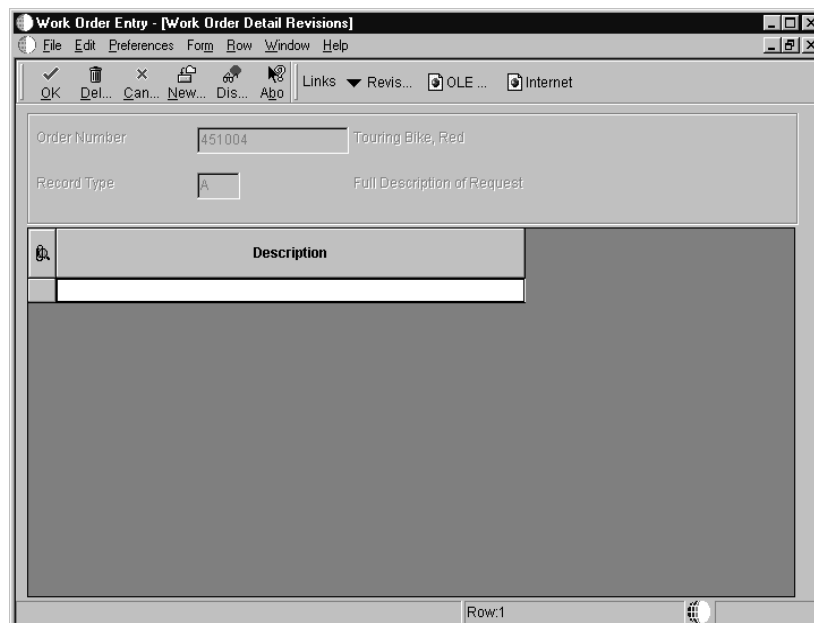
4. On Work Order Detail Revisions, type a unique description for the selected record type for this work order and click OK.

5. To type descriptions for other record types for this work order, repeat steps 3 through 4.

Field	Explanation
Equipment Number	An identification code for an asset that you can enter in one of the following formats: 1 Asset number (a computer-assigned, 8-digit, numeric control number) 2 Unit number (a 12-character alphanumeric field) 3 Serial number (a 25-character alphanumeric field) Every asset has an asset number. You can use unit number and serial number to further identify assets as needed. If this is a data entry field, the first character you enter indicates whether you are entering the primary (default) format that is defined for your system, or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats on the Fixed Assets system constants form. . . . . *Form-specific information* . . . . If you enter an equipment number when you create a work order, the system can assign a default search cross-reference number based on that equipment number. Processing options allow you to determine whether the system assigns the equipment's immediate parent number, its top-level parent number, or a value from the parent work order number as the search cross-reference.
Business Unit or Job	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant. Business unit security can prevent you from locating business units for which you have no authority. A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant. Business unit security can prevent you from locating business units for which you have no authority.
Subsidiary	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.
Parent Order Number	A number that identifies the parent work order. You can use this number to do the following: • Enter default values for new work orders, such as Type, Priority, Status, and Manager • Group work orders for project setup and reporting

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

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 – R48425            _____
        (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)
    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)
```

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 in the columns, such as dates and amounts.

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 supplemental data for a work order.

Working with supplemental data consists of the following tasks:

- Adding supplemental data to work orders
- Reviewing supplemental data by type
- Reviewing supplemental data by 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.

    • Supplemental Data Numeric Key 1

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.
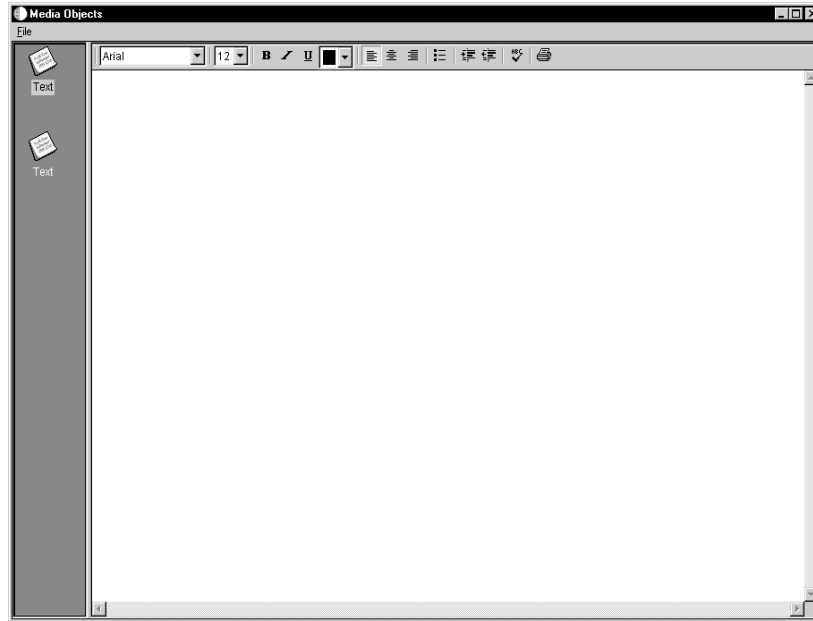
3. For Narrative data types on Media Objects, choose New from the File menu, and then choose Text.

4. Type the narrative text, such as safety procedures.

5. From the File menu, choose Save & Exit.
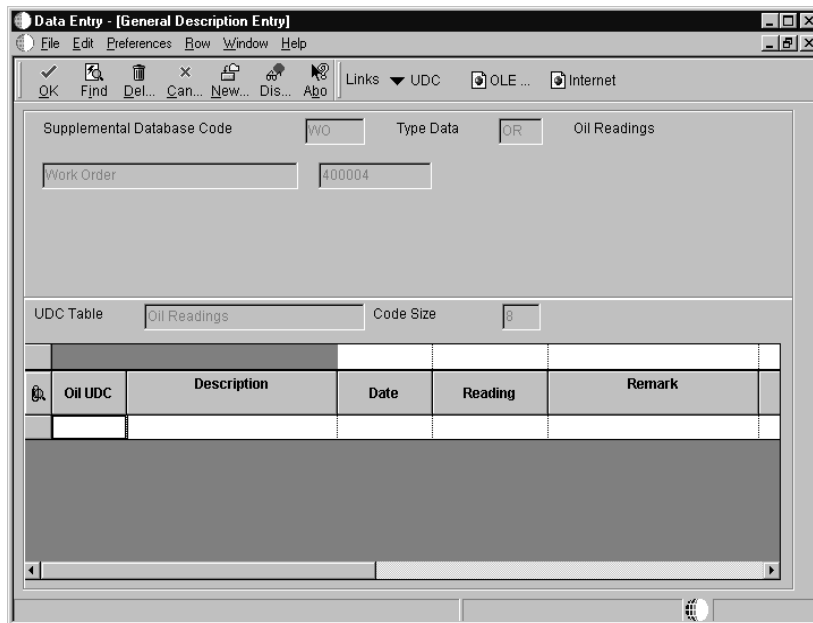
6. For Code data types on General Description Entry, complete any of the fields as needed and click OK.

| Field	Explanation
Supplemental Data Numeric Key 1	This field specifies one of the numeric keys to the Generic Supplemental Database. You can select the key from a list of supported data items, such as Address Number, Account ID, Asset ID, Item Number, and so on.

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.
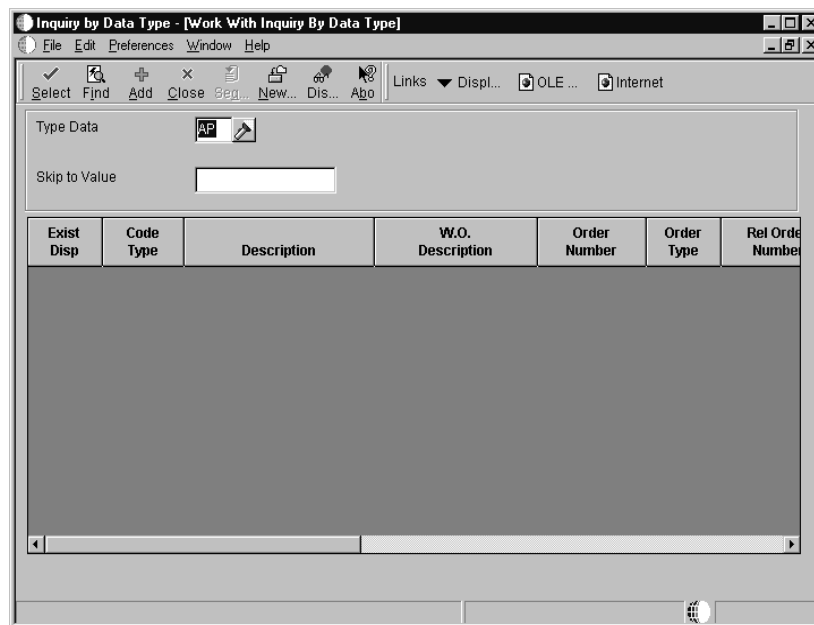
1. On Work With Inquiry By Data Type, complete the following field and click Find:

   • 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.

Field	Explanation
Type Data	A user defined code (00/WT) that indicates the type of data being entered within the supplemental database. The code is often an abbreviation for the data that it represents. For example, EC might represent Engineering Change.

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 defaultded.
```
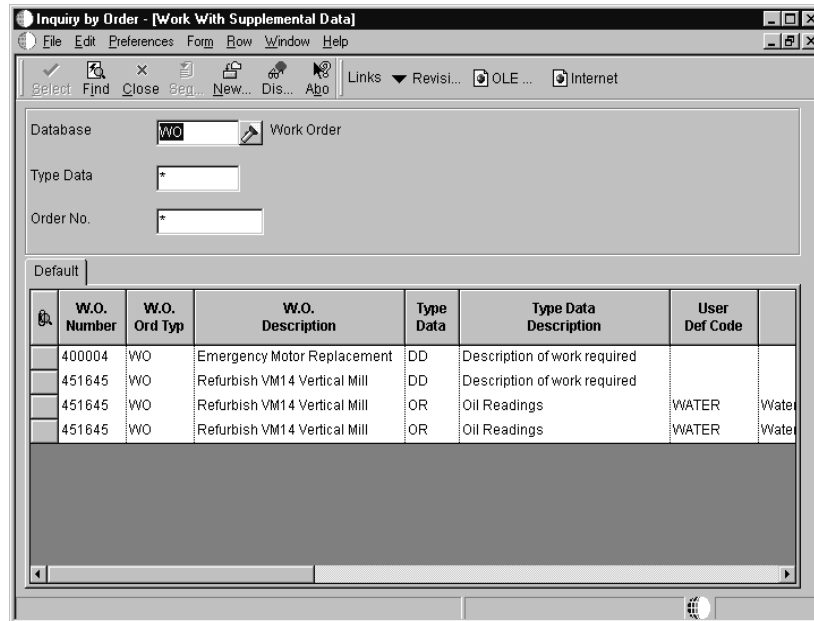
▶ **To review supplemental data by work order**

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

1. On Work With Supplemental Data, complete the following field and click Find:

   • Order No.

2. To view additional information, click the appropriate tabs or choose the appropriate options from the Row menu.

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                                           _____
```

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.

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.

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.

7. If necessary, revise any of the fields that contain information from the parent work order.

8. Enter any additional information, such as category codes and record types, to the work order.

Field	Explanation
Parent Number	This is the parent work order number. You can use this number to: • Enter default values for newly added work orders, such as Type, Priority, Status, or Manager. • Group work orders for project setup and reporting. . . . . *Form-specific information* . . . . You can copy information from a parent work order to create a new work order. On the new work order, you need to complete some fields for unique information. If you leave the remaining fields blank, the system completes them with values from the parent work order.

Creating Work Orders for a Project

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 then enter additional information that is specific to each work order.

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:

   - Address 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.

7. On Enter Work Orders, revise any fields that must contain unique information (rather than default information from the parent work order).

To access English documentation updates, see
https://knowledge.jdedwards.com/JDEContent/documentationcbt/overview/about_documentation_updates.pdf

8. Enter any additional information, such as category codes and record types, to the work order.

9. Repeat steps 6 through 8 for each project work order that you need to revise.

Field	Explanation
Parent W.O. No	This is the parent work order number. You can use this number to: • Enter default values for newly added work orders, such as Type, Priority, Status, or Manager. • Group work orders for project setup and reporting.
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other address book members.
Job or BU	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant. Business unit security can prevent you from locating business units for which you have no authority.
Phase	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time. Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
Task	A user defined name or remark.
Start Date	This is a start date for the work order or engineering change order. You can enter the date manually or let the system enter it for you. If the work order is associated with a parent work order, the system enters the start date from the parent work order. If there is no associated parent work order, the system enters the system date.
Complete Date	The date the work order or engineering change order is completed or canceled.
Hours	The estimated hours that are budgeted for this work order.

Field	Explanation
Manager	The address book number of a manager or planner.
	Note: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the information displays automatically on any work orders that you create if the category code criterion is met. (You can either accept or override the default value.)

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, a work order's life cycle can include the following statuses:

- Request for work to be performed

- Approval for work to proceed

- Waiting for materials

- Work in progress

- Work complete

- Closed

Work order processing consists of the following tasks:

❏ Locating work orders

❏ Working with work order approvals

❏ Revising work orders

❏ Printing work orders

❏ Working with charges to work orders

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 Maintenance 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.

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

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.

Working with work order approvals consists of the following tasks:

❑ Approving work orders

❑ Reviewing the approval history of work orders

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

   • Document (Order No, Invoice, etc.)

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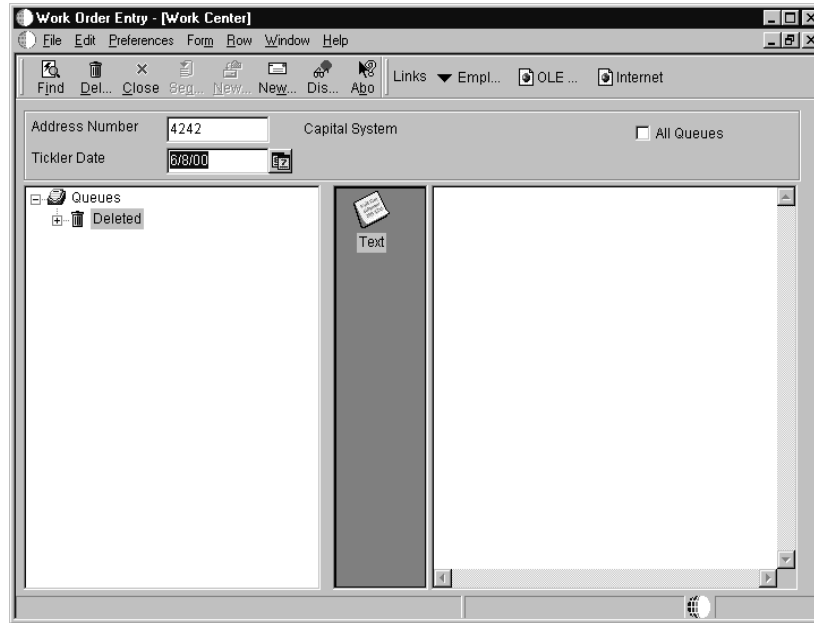
3. On Work Center, approve or reject the work order.

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

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

    - Document (Order No, Invoice, etc.)

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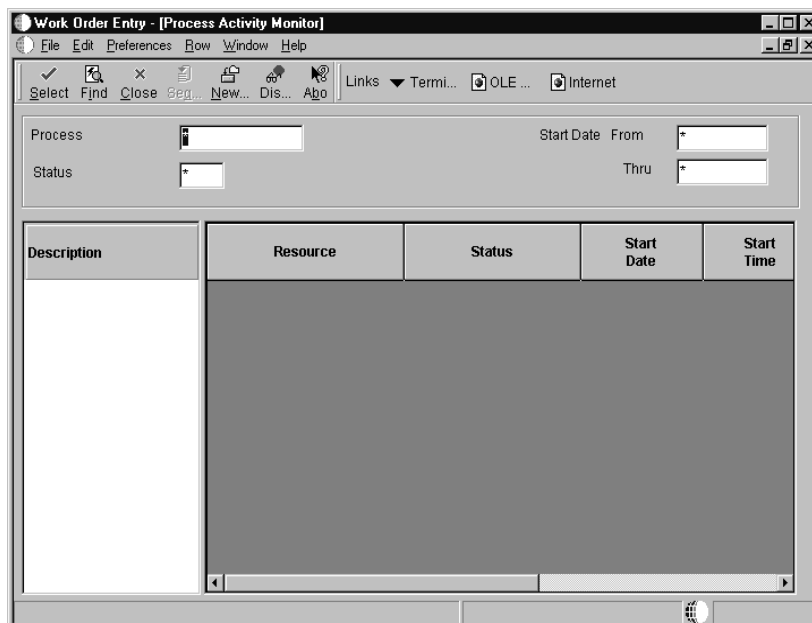
3. On Process Activity Monitor, review any notes that the approver might have entered for the work order.

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 for 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:

   - W.O. Status

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

Field	Explanation
W.O. Status	A user defined code (00/SS) that describes the status of a work order, rate schedule, or engineering change order. Any status change from 90 through 99 triggers the system to automatically update the date completed.

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 work orders consists of the following tasks:

❏ Printing a single work order

❏ Printing multiple work orders

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.

▶ **To print single work orders**

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

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.

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.

See Also

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

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

Working with charges to work orders consists of the following tasks:

❏ Adding charges to work orders

❏ Reviewing charges by job or business unit

❏ Reviewing charges by work order

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 *Issuing Inventory* in the *Inventory Management Guide*.

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.

To enter a typical accounts payable voucher:

1. On Speed Voucher Entry, enter the information for the accounts payable voucher.

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

- Account Number – Input (Mode Unknown)

- Subledger – G/L

- Subledger Type

See Also

- *Working with Standard Vouchers* in the *Accounts Payable Guide* for information about entering an accounts payable voucher

Field	Explanation
Account Number	A field that identifies an account in the general ledger. You can use one of the following formats for account numbers: • Standard account number (business unit.object.subsidiary or flexible format) • Third G/L number (maximum of 25 digits) • 8-digit short account ID number • Speed code The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program.
Sub–ledger	A number that identifies a work order in the Service and Contract Billing systems. In general, if you specify a work order, you must also specify W as the subledger type for the work order. A number that identifies a work order in the Service and Contract Billing systems. In general, if you specify a work order, you must also specify W as the subledger type for the work order.
Sub Type	A user defined code (00/ST) that you use with the Work Order (Subledger) field. For a work order, the subledger type must be W. Note: If you use accounts payable speed code entry, you can leave this field blank.

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 number of the Master
    Business Function Processing Option
    Version to be used for Speed Voucher
    Entry.  If left blank, ZJDE0001 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 Simple Project Management (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
    - From Date/Period
    - Thru Date/Period

    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.

Field	Explanation
Job or BU	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant.
	Business unit security can prevent you from locating business units for which you have no authority.
	A code that identifies a separate entity for which you want to track costs within a business. For example, a business unit might be a job, project, work center, or branch/plant.
	Business unit security can prevent you from locating business units for which you have no authority.
Ledger Type	A user defined code (09/LT) that specifies the type of ledger, such as AA (Actual Amounts), BA (Budget Amount), or AU (Actual Units). You can set up multiple, concurrent accounting ledgers within the general ledger to establish an audit trail for all transactions.
Phase	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.
	Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
	Note: A processing option for the SAR Entry lets you enter a default value for this field. The value than displays automatically in the System Code field on the SAR Entry form when you add a new SAR. You can either accept or override the default value.
From Date/Period	The beginning date of the range in a search. If you do not specify a beginning date, the system uses the current date.
Thru Date/Period	The ending date for the period that you want to review. If you leave this field blank, the system uses the ending date of the current period specified for the company.

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

Work Order Reports consists of the following tasks:

❏ Printing cost reports

❏ Printing project management reports

See Also

- *Working With Batch Versions* in the *OneWorld Foundation Guide* 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 cost reports consists of the following tasks:

❑ Printing the Cost Summary report

❑ Printing the Cost Detail report

Printing the Cost Summary Report

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

Processing Options for 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.

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

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

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 project management reports consists of the following tasks:

❏ Printing the Work Order Summary

❏ Printing the Detailed Task Description

❏ Printing the Project Status Summary

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

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

Processing Options for Print Work Order Summary (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)

```
Ledger Type

      Enter Ledger Type of the project
      for printing. Enter blank to print         _____
      all ledger types
```

Setup

To access English documentation updates, see
https://knowledge.jdedwards.com/JDEContent/documentationcbt/overview/about_documentation_updates.pdf

System Setup

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

System setup consists of the following tasks:

❑ Setting up user defined codes

❑ Setting up standard procedures

❑ Setting up default managers and supervisors

❑ Setting up approvals for work orders

❑ Setting up formats for record types

❑ Setting up supplemental data for work orders

❑ Setting up accounting rules for work orders

Understanding 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 Guide*

User Defined Codes for Work Orders

The following are user defined codes for Work Orders:

Type codes (00/TY)	Type codes classify work orders by type, such as R for rework orders and D for design orders.
Priority codes (00/PR)	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.
Status codes (00/SS)	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.
Phase or Matter codes (00/W1)	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 category codes (00/W2–W0)

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.

Record type codes (00/RT)

Record type codes organize the descriptive information that you enter for your work orders, such as S for safety provisions and E for 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 for Work Orders* for more information.

Setting Up Standard Procedures

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 retyping 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 Orders Setup 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, complete the following fields:

   • User Defined Code

   • Description

5. Choose the row that you entered and then choose General Message from the Row menu.

6. To enter new message text, complete the following field with a description of the standard procedure:

   • Description

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:

    -   Product Code

    -   User Defined Codes

    -   Message Number

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.

Field	Explanation
Product Code	A user defined code (98/SY) that identifies a J.D. Edwards system.
User Defined Codes	A code that identifies the table that contains user defined codes. The table is also referred to as a UDC type.
Message Number	A list of valid codes for a specific user defined code list.

Processing Options for Standard Procedures (P00191)

```
Defaults

1.  Enter the desired System Code.

        System Code                              _____

        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 effective on Work Order Entry and Scheduling Workbench and is based on any combination of the first three work order category codes that appear on these forms.

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

1. On Work With Work Order Default Codes, click Add.
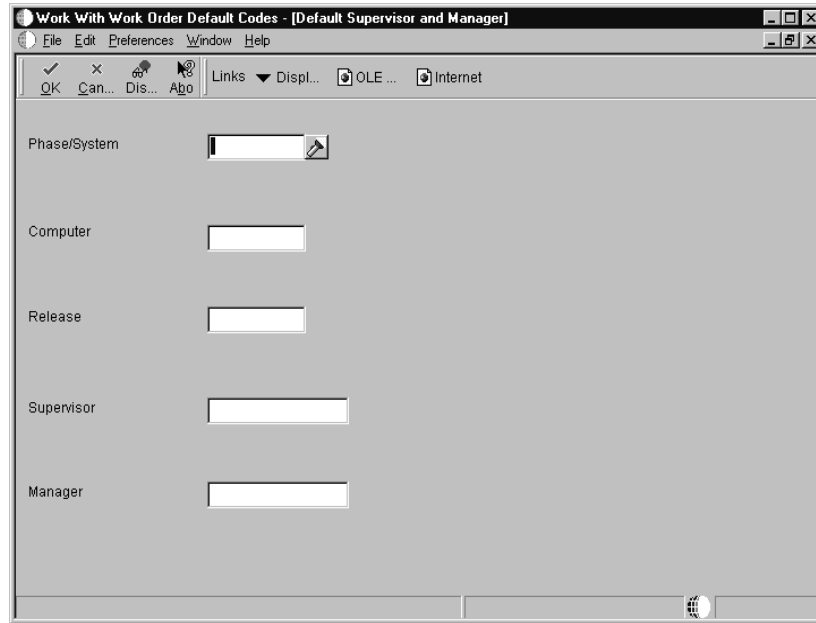
2. On Default Supervisor and Manager, complete any combination of the following fields:

- Categories – Work Order 01
- Categories – Work Order 03
- Categories – Work Order 02

3. To indicate which supervisor and manager are responsible, complete the following fields:

- Supervisor
- Address Number – Manager

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

Field	Explanation
Phase/System	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.
	Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
	Note: A processing option for the SAR Entry lets you enter a default value for this field. The value than displays automatically in the System Code field on the SAR Entry form when you add a new SAR. You can either accept or override the default value.
Computer	A user defined code (00/W3) that indicates the type or category of the work order.
	Note: A processing option for some forms allows you to enter a default value for this field. The system enters the default value automatically in the appropriate fields on any work orders that you create on those forms and on the Project Setup form. You can either accept or override the default value.
	Note: A processing option for the SAR Entry lets you enter a default value or this field. The value then displays automatically in the Release To Fix field on the SAR Entry form when you add a new SAR. You can either accept or override the default value.
Release	A user defined code (00/W2) that indicates the type or category of a work order.
	Note: A processing option for some forms lets you enter a default value for this field. The system enters the default value automatically in the appropriate fields on any work orders that you create on those forms and on the Project Setup form. You can either accept or override the default value.
	Note: A processing option for the SAR Entry lets you enter a default value for this field. The value then displays automatically in the Computer field on the SAR Entry form when you add a new SAR. You can either accept or override the default value.

Field	Explanation
Supervisor	The address book number of the supervisor.
	Note: A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. Set up the default values on the default Managers and Supervisor form. The system will automatically display the information you specified on all work orders you create if the category code criterion is met. You can override the default value.
Manager	The address book number of a manager or planner.
	Note: A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. You set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the default information displays automatically on any work orders that you create if the category code criterion is met. You can either accept or override the default value.

To access English documentation updates, see
https://knowledge.jdedwards.com/JDEContent/documentationcbt/overview/about_documentation_updates.pdf

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 approvals for work orders consists of the following tasks:

❏ Setting up activity rules for work orders

❏ Setting up approval routes for work orders

❏ Setting up user profiles

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
- 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 Orders Setup menu (G4841), choose Work Order Activity Rules.

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

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.

To access English documentation updates, see
https://knowledge.jdedwards.com/JDEContent/documentationcbt/overview/about_documentation_updates.pdf

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 Code

- 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:

- Reject Status

Field	Explanation
Order Type	A user defined code (00/DT) that identifies the type of document. The Engineering Change Management system uses type EN for engineering change orders. . . . . *Form-specific information* . . . . Enter the work order document type for which these rules apply.

Field	Explanation
WO Type	A user defined code (00/TY) that indicates the classification of a work order or engineering change order. You can use work order type as a selection criterion for work order approvals.
WO Status	A user defined code (00/SS) that describes the status of a work order, rate schedule, or engineering change order. Any status change from 90 through 99 triggers the system to automatically update the date completed.
Next Status	The next status for a work order, according to the work order activity rules, as the work order moves through the approval route. You must define a status code as a work order status in the Work Order Activity Rules table before you can use it as a next status.
Allowed Status 1	This is an optional field that indicates a status that can be assigned as the next step in the order process. Although this is not the preferred or expected next step, this status is an allowed override. The system does not allow you to initiate an order line step or status that is not defined as either the expected next status or an allowed status. Other allowed status codes let you bypass processing steps. In processing options, these codes are often referred to as override next status codes. You must define a status code as a work order status in the Work Order Activity Rules table before you can use it as a next status or another allowed status.
Subledger Inactive	A code in WorldSoftware or an option in OneWorld that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive. Examples are jobs that are closed, employees that have been terminated, or assets that have been disposed. If a subledger becomes active again, set this field back to blank. If you want to use subledger information in the tables for reports but want to prevent transactions from posting to the master record, enter a value other than blank in this field.
Maint. Status	A user defined code (12/MS) that indicates the maintenance status of a piece of equipment, such as 50 for maintenance due or 60 for waiting for parts. Note: Status code 98 is reserved for canceled maintenance. Status code 99 is reserved for completed maintenance. Status code 01, the default, is reserved for initial maintenance setup.

Field	Explanation
Lock Flag	A code that determines whether a work order can be changed at a particular status. The lock applies to records in both the Work Order Master table (F4801) and the Work Order Instruction table (F4802). Values are: Blank Do not lock the work order. 1 Lock the work order. 2 Lock the work order with a completion date. 3 Do not lock the work order with a completion date.
Reject Status	The status that the work order will default to if an approver rejects a work order.

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.

▶   **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:

   - Address Number – Parent

3. Type WFS in the following field:

   - Organization Structure Type

4. Type AMTO in the following field:

   - Associated Data Item

5. Click any of the following options:

   - First Response

   - Higher Level Override (Y/N)

   - Authorization Required (Y/N)

6. For each approver in the route, complete the following fields:

   - Display Sequence– 7.2

   - Address Number

7. Complete the following optional fields for each approver and click OK:

   - Threshold Value

   - Name – Remark

   - Begin Eff Date

   - Ending Effective Date – Julian

   - Escalation Hours/Minutes

Field	Explanation
Parent Number	The address book number of the parent company. The system uses this number to associate a particular address with a parent company or location. For example: • Subsidiaries with parent companies • Branches with a home office • Job sites with a general contractor This address must exist in the Address Book Master table (F0101) for validation purposes. Any value you enter in this field updates the Address Book Organizational/Structure table (F0150) for the blank structure type. The value you enter in the Parent Number field updates the Address Organization Structure Master table (F0150) if the Structure Type field is blank. . . . . *Form-specific information* . . . . The Address Book number of the primary level in a hierarchy, or reporting relationship. A parent in one hierarchy can be a child in another hierarchy. A hierarchy can be organized by business unit, employee, or position. For example, you can create a hierarchy that shows the reporting relationships between employees and supervisors.
Structure Type	A user defined code (01/TS) that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, e-mail). When you create a parent/child relationship for the Accounts Receivable system, the structure type must be blank. . . . . *Form-specific information* . . . . Identifies the type of distribution list, such as WFS for workflow, ORG for group, and EML for e-mail.
Associated Data Item	The data item used to retrieve the formatting information that the system uses on the Threshold Value.
First Response	If this option is turned on, it indicates that if a workflow message is sent to the members of a distribution list, only one of them must respond. When the first response is received by the workflow system, the other messages to the other members of the group are canceled, and the activity is marked as complete. If this option is turned off, all members of the group to which the workflow message is sent must respond before the system marks the activity as complete.

Field	Explanation
Higher Level Override	If this option is turned on and a person in a higher level group manually approves a workflow transaction (by a workbench program), then all lower level groups will be marked as bypassed.
	If this option is turned off and a person in a higher level group manually approves the transaction, the action is logged and all lower level groups are still required to approve the transaction.
Authorization Required	If this option is turned on and a person in the distribution list enters a workflow transaction that goes through the distribution list, the next higher person must be sent the message, even if the threshold has not been reached for the higher person.
	If this option is turned off, no higher person is required to see the message as long as it is below the threshold.
Group	A number that reorders a group of records on the form.
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members.
Threshold Value	The value used to determine if certain individuals within the distribution list should be included in the approval of a workflow activity. This can be any numeric value such as an amount, quantity, and percentage.
Remark	A generic field that you use for a remark, description, name, or address.
Begin Eff Date	The date on which the address number appears in the structure. The Beginning Effective Date field prevents the address number from occurring in the structure until the beginning effective date is the same as the current date. If left blank, the address number always occurs in a structure unless there is an ending effective date.
End Eff Date	The date on which the address book record will cease to exist in the structure.
Escalation Hours	The amount of time that must elapse before a message is escalated.

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.

► **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 the following field:

- Address Number

4. Complete any of the remaining optional fields.

Processing Options for User Profile (P0092)

```
A/B Validation

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

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.

Note: When you change the format of a record type, the system updates the format of that record type for all work orders.

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 Orders Setup menu (G4841), choose Detail Spec. Over Titles.

1. On Work With Record Types, click Add.

2. On Record Type Revisions, complete the following field:

  • Record Type

3. To define text for column headings, complete the following fields:

  • Subtitle 1

  • Subtitle 2

  • Subtitle 3

Field	Explanation
Record Type	The detail specification record type. Record types are user defined. You can set them up on the Detail Specification Types form and use them to describe certain types of work order or engineering change order information.
Subtitle 1	A subtitle, description, remark, name, or address.
	The text that you type in this field appears as a column heading on the Work Order Detail Entry form for the record type indicated.

Setting Up Supplemental Data for Work Orders

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 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 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 Guide*

▶   **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.

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

- Amount 2

- Quantity

- Effective From

- Effective Thru

- User Date

- User Days

- User Address

- User Document

Field	Explanation
Display Mode	A code that specifies the format of a data type. This code determines the display mode for supplemental data. Valid codes are:
	C Code format, which displays the form for entering code-specific information. These codes might be associated with the User Defined Codes (F0005) table.
	N Narrative format, which displays the form for entering narrative text.
	P Program exit, which allows you to exit to the program you specified in the Pgm ID field.
	M Message format, which displays the form for entering code-specific information. The system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.
	. . . . *Form-specific information* . . . .
	This is a required field for setting up any data type.
Display Mode	A subtitle, description, remark, name, or address.
	The text that you type in this field appears as a column heading on the Work Order Detail Entry form for the record type indicated.

Field	Explanation
Type Data	A code that you assign to supplemental data so that you can group data by categories.
	. . . . *Form-specific information* . . . .
	This is a required field for setting up any data type. You can use an existing data type, or you can create a new data type by entering one or two characters for the code.
Display Sequence	A number that reorders a group of records on the form.
	. . . . *Form-specific information* . . . .
	This is an optional field for setting up data types. You can specify a display sequence number for each data type. When you use the Work With Supplemental Data form, the data types appear in the order you specified.
Data Class	A user defined code (00/CL) that identifies a group of data types in the Central Information File.
	. . . . *Form-specific information* . . . .
	This is an optional field for setting up any data type. Data classifications must be set up in UDC Data Classifications (00/CL) before you can use them.
	Complete this field if you want to categorize your data types by the kind of information they contain. For example, if you have both narrative and code format data types that contain information about products purchased, you might want to assign the same data classification to both of these data types.
Search Type	A user defined code (01/ST) that identifies the kind of address book record that you want the system to select when you search for a name or message. Examples include the following: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists T Tax authority
	. . . . *Form-specific information* . . . .
	This is an optional field for setting up any data type. Search types must be set up in UDC Search Type (01/ST) before you can use them.

Field	Explanation
UDC	The title of a supplemental data column that relates to a user defined code. For example, if the supplemental data type relates to the educational degrees of employees (BA, MBA, PHD, and so on), the heading could be Degree. This column contains user defined codes.
	. . . . *Form-specific information* . . . .
	Data you enter in the UDC (alias GDC1) field overrides the UDC (alias KY) column heading name in the detail area on the General Description Entry form. You can set up this field as a generic field or as a field that is associated with user defined codes.
	If you leave the corresponding Product Code (alias SY) and Record Type (alias RT) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the UDC (alias KY) column.
	If you complete the corresponding System Code (alias SY1) and Record Type (alias TR1) fields, then on the General Description Entry form, the system validates the data you enter in the data entry field for the UDC (alias KY) column.
	This is an optional field for setting up supplemental data types in code format.
System Code	A user defined code (98/SY) that identifies a J.D. Edwards system.
	. . . . *Form-specific information* . . . .
	The System Code (alias SY1) and Record Type (alias RT1) fields work together to associate a UDC table with the Remark 1 (alias GDC3) field. The system uses the UDC table to verify data that you enter in the Remark (alias RMK) field on the General Description Entry form.
	For example, if you enter 08 in the System Code (alias SY1) field and SK in the Record Type (alias RT1) field, then on the General Description Entry form, the data you enter in the Remark (alias RMK) field must exist in the Human Resources system (08), UDC table Skills (SK).
	If you leave the System Code (alias SY1) and Record Type (alias RT1) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the Remark (alias RMK) column.
	This is an optional field for setting up supplemental data types in code format.

Field	Explanation
Record Type	A code that identifies the table that contains user defined codes. The table is also referred to as a UDC type.
	. . . . *Form-specific information* . . . .
	The Record Type (alias RT) and Product Code (alias SY) fields work together to associate a UDC table to the UDC (alias GDC1) field. The system uses the UDC table to verify data that you enter in the UDC (alias KY) field on the General Description Entry form.
	For example, if you enter 08 in the Product Code (alias SY) field and SK in the Record Type (alias RT) field, then on the General Description Entry form, the data you enter in the UDC (alias KY) field must exist in the Human Resources system (08), UDC table Skills (SK).
	If you leave the Record Type (alias RT) and Product Code (alias SY) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the UDC (alias KY) column.
	This is an optional field for setting up supplemental data types in code format.
Remark 1	The title of a supplemental data column.
	. . . . *Form-specific information* . . . .
	Data you enter in the Remark 1 (alias GDC3) field overrides the Remark (alias RMK) column heading in the detail area on the General Description Entry form. You can set up this field as a generic field or as a field that is edited against a UDC table.
	If you leave the corresponding System Code (alias SY1) and Record Type (alias RT1) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the Remark (alias RMK) column.
	If you complete the corresponding System Code (alias SY1) and Record Type (alias RT1) fields, then on the General Description Entry form, the system validates the data you enter in the data entry field for the Remark (alias RMK) column.
	This is an optional field for setting up supplemental data types in code format.

Field	Explanation
Remark 2	The title of a supplemental data column.
	. . . . *Form-specific information* . . . .
	Data you enter in the Remark 2 (alias GDC4) field overrides the Remarks Line 2 (RMK2) column heading in the detail area on the General Description Entry form. You can set up this field as a generic field or as a field that is edited against a UDC table.
	If you leave the corresponding System Code (SY2) and Record Type (RT2) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the Remarks Line 2 (alias RMK2) column.
	If you complete the corresponding System Code (SY2) and Record Type (RT2) fields, then on the General Description Entry form, the system validates the data you enter in the data entry field for the Remarks Line 2 (alias RMK2) column.
	This is an optional field for setting up supplemental data types in code format.
Amount 1	The title of a supplemental data column that relates to an amount. For example, if the data type relates to bid submittals, the heading could be Bid Amounts. This column contains statistical or measurable information.
	. . . . *Form-specific information* . . . .
	Data you enter in the Amount 1 (alias GDC1) field overrides the User Defined Amount (alias AMTU) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data types in code format.
Amount 2	The title of a supplemental data column that relates to an amount. For example, if the data type relates to stock options, the heading could be Strike Price. This column contains statistical or measurable information.
	. . . . *Form-specific information* . . . .
	Data you enter in the Amount 2 (alias GDC7) field overrides the User Defined Amount #2 (alias AMTV) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data types in code format.

Field	Explanation
Quantity	The title of a supplemental data column that relates to quantities. For example, if you want to track quantity to be scrapped, a column heading might be Scrapped.
	. . . . *Form-specific information* . . . .
	Data you enter in the Quantity (alias GDC0) field overrides the Quantity Ordered (alias UORG) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data types in code format.
Effective From	The title of a supplemental data column that relates to a date. For example, a possible column heading for the date field linked to a data type for education might be Graduation.
	. . . . *Form-specific information* . . . .
	Data you enter in the Effective From (alias GDC5) field overrides the Effective Date (alias EFT) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data types in code format.
Effective Thru	The title of a supplemental data column that relates to a date. For example, if you set up a record type for professional licenses, a possible column title for the date field might be Expires.
	. . . . *Form-specific information* . . . .
	Data you enter in the Effective Thru (alias GDC6) field overrides the Ending Date (alias EFTE) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data types in code format.
User Date	The title of a supplemental data column that relates to a date. For example, a possible column heading for the date field linked to the education data type might be Graduation.
	. . . . *Form-specific information* . . . .
	Data you enter in the User Date (alias GDCA) field overrides the User Def Days (alias DYUD) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data types in code format.

Field	Explanation
User Days	The title of a supplemental data column that relates to a heading of a supplemental data column heading for the User Defined Days field (DYUD). For example, a possible column heading for the days field linked to scheduling data type might be Lead Time. This column contains numbers.
	. . . . *Form-specific information* . . . .
	Data you enter in the User Days (GDCC) field overrides the User Def Days (alias DYUD) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data types in code format.
User Address	The title of a supplemental data column that relates to addresses. For example, a possible column heading for the address field linked to an education data type might be the College Address.
	. . . . *Form-specific information* . . . .
	Data you enter in the User Address (alias GDCD) field overrides the User Address (alias AN8) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data types in code format.
User Document	The title of a supplemental data field that relates to a document number. For example, if your company handles accounts receivables, a possible column heading might be Invoices. This column contains document numbers.
	. . . . *Form-specific information* . . . .
	Data you enter in the User Document (alias GDC8) field overrides the Related PO/SO No (alias RORN) column heading name in the detail area on the General Description Entry form.
	This is an optional field for setting up supplemental data type in code format.

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 Time Accounting Setup menu (G05BT4), choose Debit - Labor/Billing/Equipment.

1. On Work With Accounting JE Rules - Labor/Billing/Equipment, click Add.
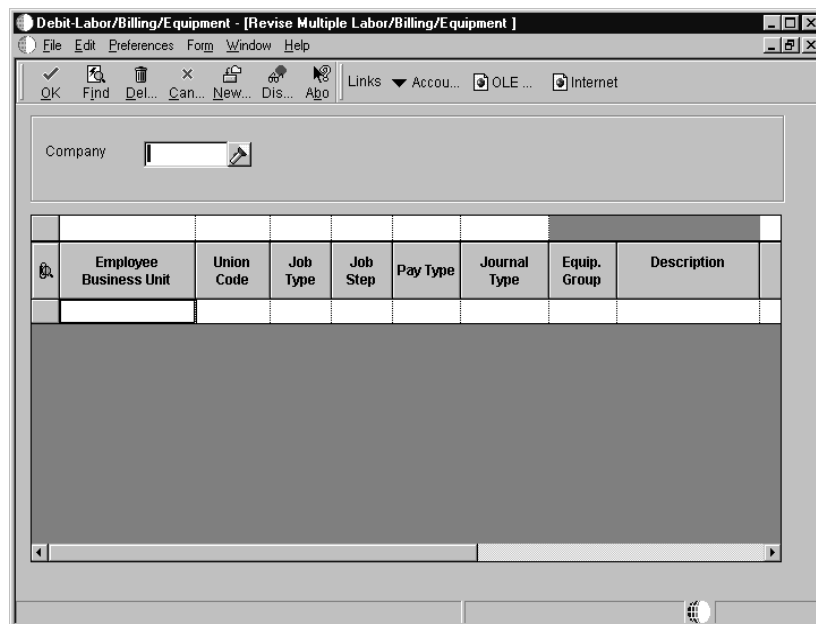
2. On Revise Multiple Labor/Billing/Equipment, complete the following fields:

    - Company

    - Journal Type

    - Object Account

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

Field	Explanation
Company	A code that identifies a specific organization, fund, entity, and so on. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.
	Note: You can use Company 00000 for default values, such as dates and automatic accounting instructions. You cannot use Company 00000 for transaction entries.
Journal Type	A code that represents the type of transaction for which an account is to be derived.

Field	Explanation
Object Account	The portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories. For example, dividing labor into regular time, premium time, and burden.
	Note: If you are using a flexible chart of accounts and the object account is set to 6 digits, J.D. Edwards recommends that you use all 6 digits. For example, entering 000456 is not the same as entering 456, because if you enter 456, the system enters three blank spaces to fill a 6-digit object.

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.

Global updates consists of the following tasks:

❏ Updating the phase and equipment number

❏ Purging closed 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 table (F4801). See *Backing Up OneWorld Tables* in the *Server and Workstation Administration Guide*.

❏ Communicate to the users that no one accesses or modifies the Work Order Master table while you run this procedure.

Purging Closed Work Orders

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

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.

Appendices

Appendix A: Workflow Concepts and Setup

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

The appendix includes the following information:

- Overview that describes the major features of Workflow Management as it applies to Work Orders
- Table of terms and concepts specific to Workflow Management
- Section describing workflow setup considerations for Work Orders
- Example of a workflow process for a typical work order

About 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

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:

- 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.

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.

Workflow processes

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:

- 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.

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.

For more information about Workflow processes, see *Considerations for Setting Up Workflow Processes* elsewhere in this appendix.

Workflow activities

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:

- Function
- Interactive application
- Batch application
- Run executable
- Message
- Halt process
- Process

For a more detailed description of each type of activity, see *Considerations for Setting Up Workflow Activities* elsewhere in this appendix.

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, choose a process and click Select, or click Add.

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

See Also

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

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

Start

If approve
(Activity condition)

If reject
(Activity condition)

Send action
message
(Message
activity)

Accept

Reject

Update the
database
(Function activity)

Notify originator
that request has
been rejected
(Message
activity)

Send notification
to user
(Message activity)

End
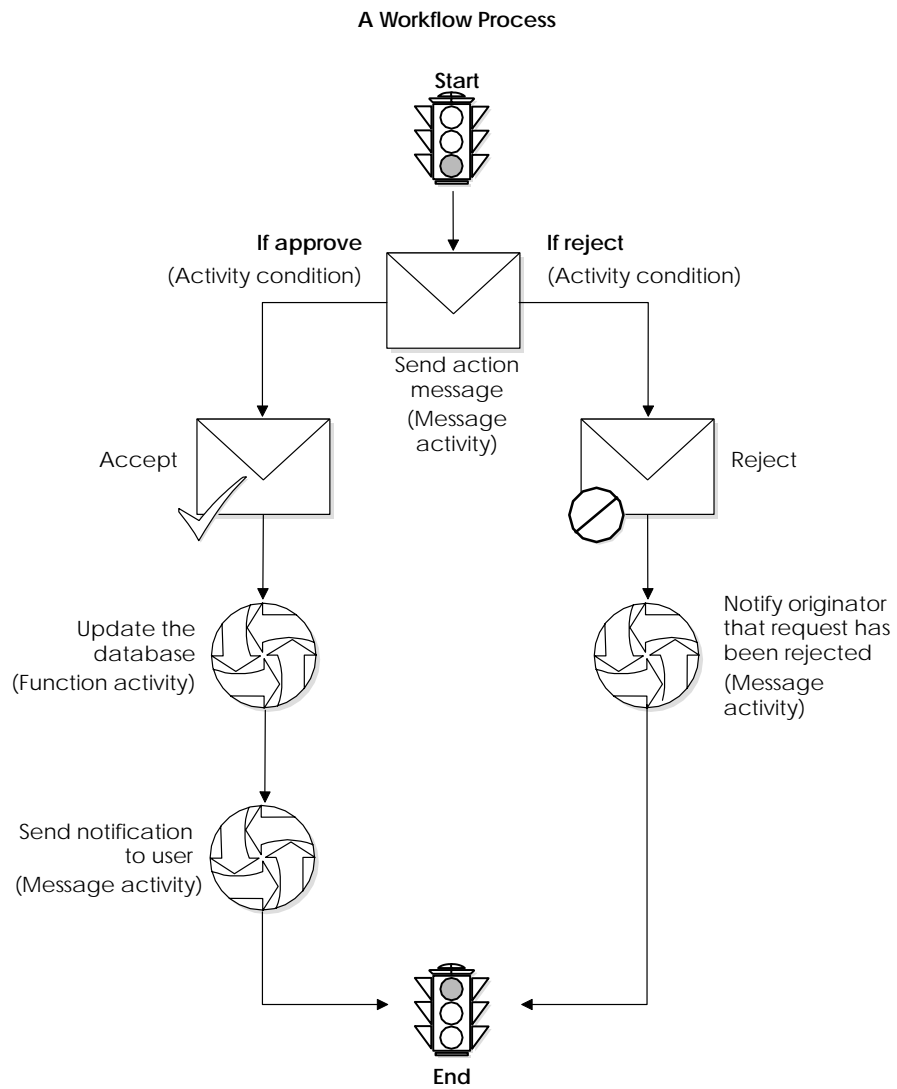
Workflow Revisions Form, Relationship Tab

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

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

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.

See Also

- *Adding Activities to a Process* in the *Enterprise Workflow Management Guide* 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 Guide*

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.

Create Work Order
or Change Work
Order Status

Work Order
Activity Rules
(F4826)

Based on Document Type
(DCTO) and Work Order Type
(TYPS), Work Order Activity
Rules determine if the status
change is allowed.

Is Work Order Status
Change Allowed?

No

Error

Yes

Begin Workflow

WOActRules

WOType

Act

Con or
OrgRule

N Act

Act

Con or
OrgRule

N Act

Start
Start
Start
WOType
Approve
Approve
NextStat
End

Doc Type WO
Doc Type EN
Doc Type

Approve
Reject

WOType
Approve
End
End
NextStat
End
End

Start
Start
Start
WOType1
WOType3
End

Type1
Type3
Type

WOType1
WOType3
End
End
End

WOType1

WO1App1

Act

Con or
OrgRule

N Act

Act

Con or
OrgRule

N Act

Start
BeginProc
BeginProc
BeginProc
BeginProc
Approve
Approve
Capacity
Commit
Message
RejectStat
NextStatus
End

AppStat
CapStat
CommStat
NoActivity
Approved
Rejected

BeginProc
Approve
Capacity
Commit
End
NextStatus
Message
End
End
RejectStat
End
BeginProc

Start
Start
Start
Start
WO1App1
WO1App2
End

Approve 1
Approve 2
Approve

WO1App1
WO1App2
End
ENd
End

Commits Inventory
to the Work Order
Runs Capacity Plan
Generation

WOActRules = Work Order Activity Rules Process
WOType = Work Order Type Process
WOType1 = Work Order Type 1 Process
WO1App1 = Work Order Type 1 Approve 1 Process
Con or OrgRule = Conditional or Organizational Rule
Act = Activity
N Act = Next Activity

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