



EnterpriseOne Xe Change Management PeopleBook

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Change Management Overview

The J.D. Edwards Change Management system allows you to monitor changes to a job or project through multiple revisions and approval stages. The Change Management system has the following features:

- An approval process that lets you move a change request through a series of approval stages
- The ability to create requotes, which provide an audit trail for multiple quotations and stages of approval outside of the General Accounting and Job Cost systems
- The ability to monitor changes by change request numbers
- The ability to monitor changes by subledger detail
- The ability to create an audit trail in General Ledger for line items in the change request system as they are modified and approved
- The ability to calculate the best amount of a change request line item based on its original, quoted, and final amounts
- The ability to manage change requests by attaching related change requests to a planned change order and attaching related planned change orders to a change order
- A document control feature that is shared with the Subcontract Management system
- A search facility that supports a wide range of search criteria, such as job number, ledger type, supplier, account cost code, and cost type
- The ability to commit change requests to Subcontract Management

Change Management Process

The J.D. Edwards Change Management system is a flexible system of interrelated programs that let you create a change management process to suit your organization. You can set up a very simple process by using only change requests to track changes to the accounts affected by changes to a job. Or, you can create a more comprehensive process to automatically move change requests through an approval process, send information about changes to other J.D. Edwards systems such as Subcontract Management, and track details about changes to a job.

The following topics discuss a typical change management process that incorporates many of the extended features of the Change Management system.



Creating Change Requests

The change management process begins with change requests. You create change requests to track changes such as those to costs or to accounts charged or credited. When you create a change request, you assign detail status codes to each line item of account distribution information. These detail status codes indicate the line item's current stage in the approval process. As you revise account distribution information for a line item, you can update the status codes to move the change request to the next approval stage. If you set up your detail status codes to refer to account ledgers, you can automatically update ledgers with revised amounts when you update the status of a change request.

Creating Planned Change Orders and Change Orders

After you create change requests, you can group related change requests by attaching them to planned change orders (PCOs). You can group related PCOs by attaching them to change orders (COs). Grouping change requests and PCOs makes it easier to locate information about related changes.

Modifying Change Requests

After you create change requests, you might need to modify them.

Audit Trail

As a job progresses, you might need to modify change requests. The J.D. Edwards Change Management system lets you set a processing option so that the system creates an audit trail. When you set the Audit Trail processing option, the system writes information to the Account Ledger table (F0911).

Requotes

You can also track changes by generating requotes. A requote is a version of the change request. When you modify a change request, you can save the modified version as a requote. Then, when you need to view a history of changes, you can view the versions to compare the changes.

Status Updates

As your job progresses, you change the status of the change requests that are associated with it. The Change Management system lets you create detail status codes that you use to track the approval stage of the change request. You can associate ledger types with detail status codes. When you assign a status code that has a ledger type associated with it to a line item on a change request, you can update the appropriate ledger from the Change Management system. You can update detail status codes individually, or you can use the Global Status Update program to update numerous accounts simultaneously.

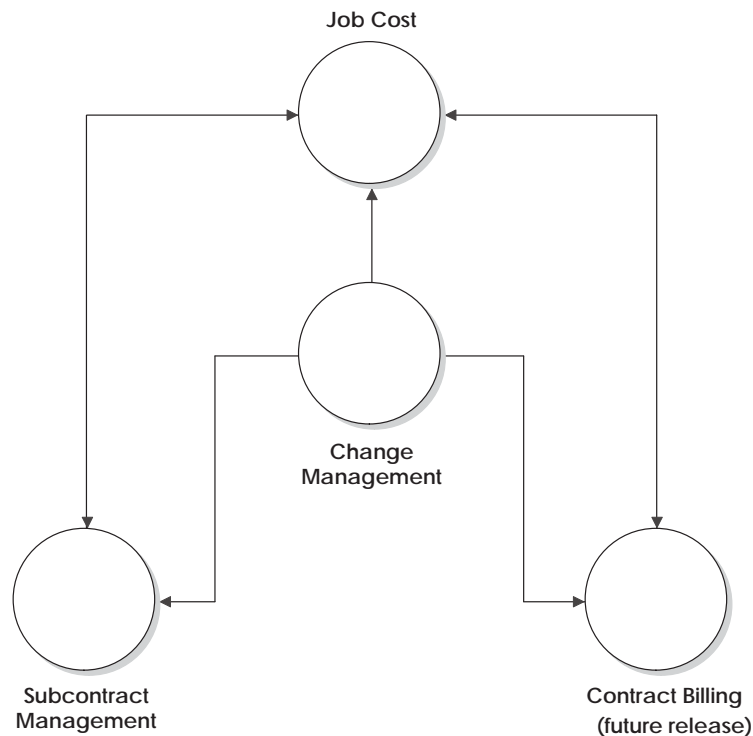
Reviewing Modifications

You can review the history of modifications made to a change request by viewing requotes, account ledger history, and by viewing original, quoted, and final amounts for affected accounts. You can also review all of the change requests for a job that have the same cost code, cost type, supplier, or ledger type.

System Integration

The Change Management system is a focal point for integrating the Job Cost and Subcontract Management systems. The Change Management system integrates with the Subcontract Management system so that you can send information from a subcontract account on a detail line on a change request to the Subcontract Management system. Therefore, you only need to enter information about a change request in the Change Management system. Any time after a change request is created, you can enter information about related documents and activities, such as engineering drawings, submittals, and tasks that need to be performed.

The following graphic shows the integration of the Change Management, Job Cost, and Subcontract Management systems:



When you create a change request, you must provide information about which accounts are affected by each line item in the change request. When you set up detail status codes, you will associate some of the detail status codes with the ledgers associated with those accounts. When you update a change request's detail status code to a status code that has a ledger associated with it, the Change Management system updates the account balances for the ledger types specified. For example, you can define a detail status code that automatically updates the Job Cost budget ledger. Then, when you make a status change to a line item that has that status code assigned to it, the system moves amounts and quantities from the old ledger to the new ledger, thus keeping the ledgers balanced.

Coexistence

Coexistence is an environment setup in which WorldSoftware programs and OneWorld applications access the same database. The Change Management system in OneWorld is not coexistent with the Change Management system in WorldSoftware.

Menu Overview

Change Management Main Menu (G53)

Daily Processing (G5310)

- Change Management Setup G5311
- Change Management Inquiries G5312
- Change Management Reports G5313

System Setup (G5341)

- Change Management User Defined Codes G5342

Tables and Descriptions

The Change Management system uses the following tables:

Change Request Master (F5301B)	<p>Stores change request master information, such as:</p> <ul style="list-style-type: none">• Job number• Change request number• Description• Status• Planned change order (PCO) number
Change Request Details (F5311)	<p>Stores detail information for change requests, such as:</p> <ul style="list-style-type: none">• Detail status code for each cost, revenue, and subcontract account• Line number• Ledger type• Requote number• Account cost code• Account cost type• Original, quoted, final, and best amounts for each account type• Subcontract number for subcontract accounts• Closed flag
Planned Change Order Master (F5314)	<p>Stores information for planned change orders (PCOs), such as:</p> <ul style="list-style-type: none">• Status• Closed flag• CO number of the change order to which the PCO is attached
Change Order Master (F5315)	<p>Stores information regarding a change order, such as:</p> <ul style="list-style-type: none">• Status• Closed flag
Job Master (F0006)	<p>Stores job master information, including the job description, job number, job type, company, and category codes.</p>
Account Ledger (F0911)	<p>Stores detail transactions in the general ledger. There is one record per transaction. The Account Ledger table tracks revisions to account balance amounts and quantities by providing a detailed audit trail of transactions.</p>

Subcontract Management Master (F4311)	Stores master information for subcontract management, including subcontract numbers and vendor addresses.
Change Request Detail Status Update (F53101)	Stores the detail status codes that show the ledger the system updates with the amount type and quantity for cost, revenue, and subcontract accounts.
Log Master Revisions (F4303)	Tracks information for contracts, including: <ul style="list-style-type: none">• Job number• Change request number• Log type• Log number• Status• Dates
Account Master (F0901)	Stores account definitions, including account numbers and descriptions. There is one record per account. The Account Master table enables the adjustment of the percentage of completion for jobs during profit recognition processing by using the header account created when a job master record is created.
Account Balances (F0902)	Stores information about amount and unit ledger types used in detail status codes for change requests.
Job Specific UDCs Master (F53005)	Stores by job the user defined code information that is specific to the Change Management system.
Ledger Type Master (F0025)	Stores rules for specific ledger types, such as: <ul style="list-style-type: none">• Budget amounts• Budget units• Annual close budget• Summarize and close
Automatic Accounting Instructions (F0012)	Stores the rules that determine how the system creates automatic balancing entries, special interim totals for reports, and general information about the chart of accounts.
User Defined Codes (F0005)	Stores user defined codes and their descriptions.

Daily



Change Request Creation

You use change requests to record and monitor changes to a job as the job progresses. A change request is the lowest level in the change management hierarchy, and contains the detailed information that you need to track changes to a job. After you create change requests, you can attach related change requests to the next level in the hierarchy – the planned change order. Attaching related change requests to a planned change order makes it easier to locate specific change requests.

Creating change requests consists of the following tasks:

- ☐ Understanding change requests
- ☐ Entering change requests

See Also

- *Change Management Hierarchy Creation* for more information about the change management hierarchy



Understanding Change Requests

Before you create change requests, you should decide how to organize them and should understand the components of change requests. Understanding change requests consists of the following tasks:

- ☐ Organizing change requests
- ☐ Understanding change request components
- ☐ Understanding detail status codes

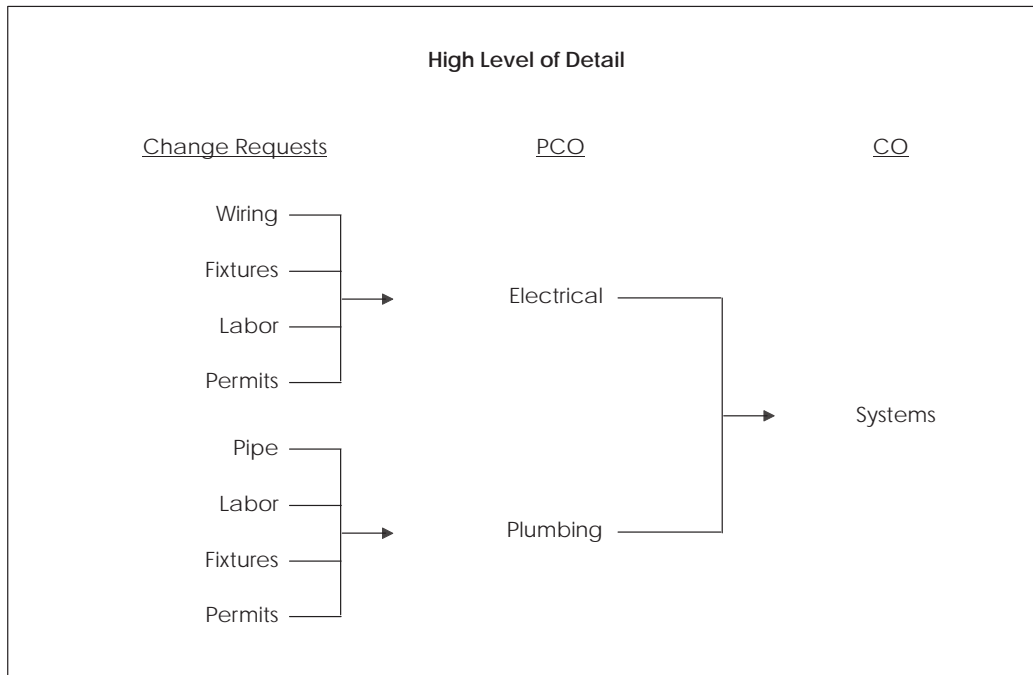
Organizing Change Requests

Before you create any change requests for a job, you should decide how detailed you want your change request hierarchy to be. You can use a high level or a low level of detail. Whether you decide to use a high level or low level of detail, you can still attach related change requests to planned change orders (PCOs) and related PCOs to change orders (COs) to further organize your change requests.

A large job might have hundreds of changes. You can organize the changes in many ways to suit your needs. For example, you can create hundreds of change requests, each of which has only a few line items, or you can create fewer change requests, each of which has and place many line items.

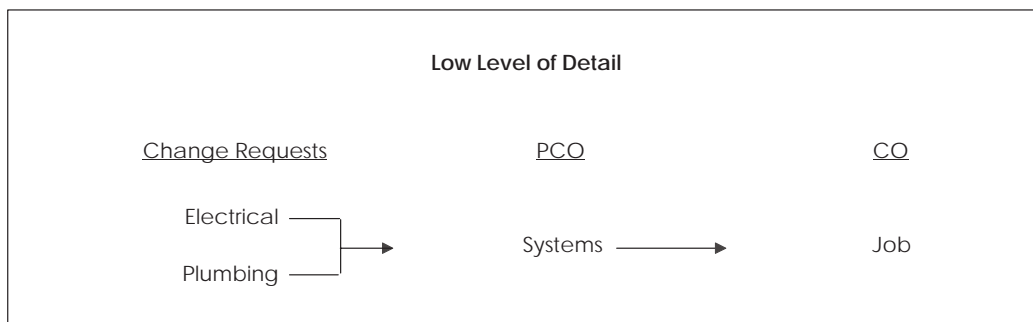
When you create hundreds of change requests, you create a change request hierarchy that has a high level of detail. Each change request in a high-detail level hierarchy is very specific. For example, you might create a change request that contains only line items for electrical wiring changes for the month of May, one that has wiring changes for June, one that has changes to fixtures for May, one with fixture changes for June, and so on. Each change request might have only a few line items, but you will have many change requests to keep track of.

The following graphic shows an example of a hierarchy with a high level of detail:



When you create fewer change requests that each have many line items, you create a low-detail level hierarchy. For example, you might create a change request for all electrical changes. That one change request might contain changes for wiring, fixtures, labor, and permits over the entire course of the job. Such a change request will likely have dozens of line items, but you will only have one change request to review when you are searching for information or need to modify a line item.

The following graphic shows an example of a hierarchy with a low level of detail:



Benefits and Drawbacks of Hierarchy Detail Levels

The decision to use a high level of detail or a low level of detail might depend on the number of jobs or the number of changes that you need to track. Before you decide how to organize your change requests, you should also understand how the Global Status Update program works. Because the Global Status Update program lets you move groups of accounts on a change request through the approval process, how you group your change requests might affect how you use the Global Status Update program.

The following table lists some of the benefits and drawbacks of each level:

High-detail level

Benefits include:

- All line items are very closely related.
- Since all line items are closely related, the Global Status Update program might be easier to use.
- Planned Change Order reports show totals for all change requests attached to the PCO.

Drawbacks include:

- You must review many change requests to find the one with the line items you want.

Low-detail level

Benefits include:

- Fewer change requests.
- If all lines and accounts on the change request will move through the approval process at the same time, you can save time by using the Global Status Update program to change them to the next status.

Drawbacks include:

- Many line items on each change request.
- Sorting through line items might be difficult.
- When using the Global Status Update program when accounts on a change request will not move through the approval process as a group, you must be careful not to change detail status codes that you do not want to change.

See Also

- *Understanding Global Status Updates* for more information about using the Global Status Update program

Understanding Change Request Components

A change request always includes the following items:

- A job number to link the change request to a job.
- A description to define the type of change request.
- Account distribution information for each line item to provide details about the accounts affected by the change. The account distribution information includes the type of account (cost, revenue, subcontract) and the original, quoted, and final amounts for the account types that are displayed. You can enter positive and negative monetary amounts.
- A detail status code to provide the approval stage of the change request.

In addition, a change request can include the following information:

- Subcontract information to link information from the subcontract account on a detail line on a change request to the appropriate contract in the Subcontract Management system.
- General information to help identify the change request, such as the originator, the person who requested it, and the responsible manager.
- Information about related documents, such as submittals, transmittals, and engineering drawings.
- Extended text to further explain the change request.

Understanding Detail Status Codes

You use detail status codes to indicate the approval stage of an account on a change request. Detail status codes are user defined codes that define the following:

- Which ledgers in the Job Cost system to update
- The record type (cost, revenue, or subcontract)
- The amount and quantity type of the line item (original, quoted, final, or best)

Different status codes often represent different stages of the process. For example, you might have codes for accounts that are submitted, rejected, committed to Subcontract Management, and approved. At any time during the approval process, you can update the detail status code manually or by using the Global Status Update program.

When you set up detail status codes in the Change Request Detail Status Code Update table (F53101), you associate each of them with an amount type (original, quoted, final, or best) and with a record type (cost, revenue, or

subcontract). You also associate ledger types with some of the detail status codes. Associating amount, record, and ledger types with detail status codes lets you use the status codes to specify how the system updates account balance information at various approval stages.

Detail status codes update ledger information only if you associate a ledger type with the status code. When you update an account in a detail line with a detail status code that is associated with a ledger type, the system updates the appropriate ledger. You typically associate a ledger type with a status code that signifies that the detail line item on the change request is approved. When you attach a ledger type to a detail status code, you also specify which amount type (original, quoted, final, or best) the system uses when updating the associated ledger.

You define detail status codes in the Change Request Detail Status Code Update table (F53101).

Note: Do not confuse status codes that are defined in the Change Request Detail Status Code Update table (F53101) with status codes that are defined in the User Defined Codes table (F0005). Status codes that are defined in the User Defined Codes table provide information for a change request and are informational only. They do not update ledgers.

See Also

- *Setting Up Change Request Detail Status Codes* for more information about setting up detail status codes

Entering Change Requests

Change requests track changes to a job as it progresses. You can enter a single line item or multiple line items for each change request. Typically, you set up a change request that relates to a specific aspect of the job. For example, if the job is to construct an office building, change request 1 might be for tracking foundation details, change request 2 for framing details, and so on.

Change requests consist of the following:

- General change request information
- Account distribution information for cost, revenue, and subcontract accounts
- Subcontract information that allows you to send the account distribution information to the appropriate contract in the Subcontract Management system
- Detail status codes to track the approval status

Entering change requests consists of the following tasks:

- ☐ Entering basic change request information
- ☐ Entering account distribution information
- ☐ Copying account balances

After you have entered basic information for your change requests, you can enter additional information, exit to other programs, print reports, create quotes, and update statuses. You use the Form and Row exits from the Change Request Entry form to access these features.

See Also

- *Organizing Change Requests* for information about factors that might affect your decisions about grouping change requests

Form Menu Features

The Form menu on the Change Request Entry form includes the following options:

Account Master Pick

You can choose which accounts will be included in a change request through the chart of accounts already set up for the job. You can define whether you want the header account or the detail account description displayed for cost, revenue, and subcontract accounts.

Requotes

You can create requotes to track changes you make to account distribution information. A requote is a version of the detail line. After you create a requote, you can use it to compare changes made to the detail line. Choose from the following options:

- Prior Requote. Use this option to view the previous requote.
- Next Requote. Use this option to view requotes created after the original requote.
- Generate Requote. Use this option to create a new requote.

See *Generating Requotes* for more information.

Copy Amounts

The Copy Amounts option on the Form menu lets you copy amounts for all line items on a change request for columns that are currently displayed. This option saves time with data entry when you need to update all amounts. Choose from the following options:

- Original to Quoted. This option copies the original amount to the quoted amount.
- Quoted to Final. This option copies the quoted amount to the final amount.

Note: The Copy Amounts option on the Row menu lets you copy amounts for a specific line on a change request.

See *Copying Account Balances* for more information.

Global Status

You can globally update the detail status code for cost, revenue, and subcontract accounts for all detail line items on a change request. This option saves time with data entry. When you choose Global Status, the system prompts you to specify the codes that you want to change.

Note: The Global Status Update program updates only the detail status codes for the columns (cost, revenue, and subcontract) that are displayed.

See *Understanding Global Status Updates* for more information.

Create PCO

You can automatically create a planned change order (PCO) and attach an existing change request to it. When you use this option, the system attaches the current change request to a PCO that the system creates. The PCO will have the same title as the change request, a PCO status of Submitted, and the current date for the PCO submitted date.

PCO Entry

You can exit directly to the Planned Change Order Entry program (P5314) to view change requests attached to PCOs or to create a PCO.

See *Creating a Planned Change Order* for more information.

CO Entry

You can exit directly to the Change Order Entry program (P5315) to view PCOs attached to COs or to create a new CO.

See *Creating a Change Order* for more information.

Log Revision

You can exit to the Log Master Revisions (P4303) program in the Subcontract Management system. This program tracks and controls money for jobs by vendor and contract. You can set up prerequisites and enter additional data.

See *Maintaining Subcontract Logs* for more information.

Save Columns

You can save a column version for the Change Request Entry program. This option defines which columns the system displays when you access the program. After you save a column version, you can set a processing option to have the system display the saved column version when you access the Change Request Entry program.

Delete Change Request	You can delete a change request if you have not entered detail information for the change request.
Print Summary/Detail	<p>You can print a Change Request Summary or Detail report. A processing option controls whether the report is a summary or detail report, and which version the system uses.</p> <p>See <i>Printing Change Management Reports</i> for more information.</p>
Attachments	<p>You can attach documents, images, and other media to change requests from the Media Objects form.</p> <p>See <i>Attaching Media Objects</i> in the <i>OneWorld Foundations Guide</i>.</p>

Row Menu Features

The Row menu on the Change Request Entry form includes the following options:

G/L Account Inquiry	You can inquire on a specific account (cost, revenue, or subcontract) in the change request through the Account Ledger Inquiry program (P09200).
Additional Details	<p>You can change some information regarding cost, revenue, or subcontract details in your change request. Data for cost and revenue accounts is informational only.</p> <p>When you select the Subcontract Details tab, you can search for and complete subcontract information and can submit a subcontract account to the Subcontract Management system.</p>
Copy Amounts	<p>You can copy amounts for a selected line item on a change request for columns that are currently displayed. Choose from the following options:</p> <ul style="list-style-type: none">• Original to Quoted. This option copies the original amount to the quoted amount.• Quoted to Final. This option copies the quoted amount to the final amount. <p>Note: The Copy Amounts option on the Form menu lets you copy amounts for all line items on a change request.</p> <p>See <i>Copying Account Balances</i> for more information.</p>

Subcontracts

When you choose a row containing a subcontract account that has an associated contract number, you can exit to the Order Header form in the Purchase Order (P4310) program and view or complete additional subcontract information.

Delete Detail Line Item

You can delete a detail line item if it was entered in error. You can only delete a detail line item if you have not assigned to it a detail status code that has a ledger type associated with the status code, or if it is not closed. You can only delete a detail line item that has a subcontract account if the account has not been committed to the Subcontract Management system.

Attachments

You can attach documents, images, and other media to change requests from the Media Objects form.

See *Attaching Media Objects* in the *OneWorld Foundations Guide*.

Before You Begin

- ☐ Verify that the job exists in the Job Cost system.
- ☐ Verify that detail status codes are set up in the Change Request Detail Status Code Update (F53101) table. See *Setting Up Change Request Detail Status Codes* to review the codes.

See Also

- *Creating a Job Master Record* in the *Job Cost Guide* for more information about setting up a job
- *Organizing Change Requests* for information about how to group related information on change requests

Entering Basic Change Request Information

When you create a change request, you can enter one line item or multiple line items. Each line item can have any combination of cost, revenue, and subcontract accounts.

Information in the header area of a change request, such as the header status, priority, dates, and job-specific user defined codes, is shared. When you create change requests, assure that all line items are able to share the header information.

Information in the detail area of a change request, such as the cost, revenue, and subcontract accounts affected by the change, can be different for each line item.

Technical Considerations

Ledger types

If you use a detail status code that has a ledger type attached to it, the system copies information into the Account Ledger table (F0911) as follows:

- The description of the general information for the change request is copied into the Alpha Explanation field (EXA).
- The description of the account distribution information for the change request is copied into the Remark Explanation field (EXR).
- The change request number is copied into the second reference field (R2).

To enter basic change request information

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Add:
 - Job Number
2. On Change Request Entry, complete the following fields on the Header tab:
 - Change Request Number
 - Description
 - Status Code
 - Owner Change Required
 - Type Change Request
 - Priority Code

3. To display the appropriate columns for the type of account (cost, revenue, or subcontract) for which you are entering a change request, click the Display tab and then choose the type of columns that you want to work with. You can enter information only for the columns that are displayed.
 - To display columns for cost accounts, choose Cost Column.
 - To display columns for revenue accounts, choose Revenue Column.
 - To display columns for subcontract accounts, choose Subcontract Column.
 - To display columns for cost and revenue accounts, choose Cost, Revenue Columns.
 - To display columns for cost and subcontract accounts, choose Cost, Subcontract Columns.
 - To display columns for revenue and subcontract accounts, choose Revenue, Subcontract Columns.
 - To display all columns, choose All Columns.

The screenshot shows the 'Change Request Entry' window with the 'Columns' section expanded. The 'Columns' section contains a 'Column Version' text field and several checkboxes for selecting columns to display. The 'Detail Description' table below shows a single row with the value 'Major Materials'.

Detail Description	N	P	Cost Sts	Cost LT	Cost Original	Cost Quoted	Cost Final	Cost PI
Major Materials	N		Q	KA	56,000.00			

4. To save the selected columns as a column version that you can specify in a processing option, choose Save Columns from the Form menu.
5. On Change Management Column Version, complete the following field and click OK:
 - Change Management Version

Choose the columns that you want before entering additional data for the change request. You can choose accounts only for the columns that are displayed.

6. Choose Account Master Pick from the Form menu.
7. On G/L Account Search, click Find.

In the detail area of the form, the system displays the chart of accounts that are set up for the job.

Obj Acct	Sub Acct	Description	L D	P E	Budg Patt	UM	CAT 1	CAT 2	Fre Acct
1343	0404005	Fringes	8						
1343	5985100	Fringes	8						
1350	0202000	Equipment	8			LS			
1350	0202023	Equipment	8			LS			
1350	0202026	Equipment	8			LS			
1350	0303003	Equipment	8			LS			
1350	0404001	Equipment	8			LS			
1350	0707005	Major Materials	8			%			
1351	0100077	Small Materials	8			LS			
1351	0101109	Small Materials	8			LS			

8. Choose the accounts that you want to include in the change request, and then choose an option from the Row menu.

Note: You can only choose an option that applies to the types of columns that are displayed on the Change Request Entry form. For example, you can only choose Cost Detail if cost columns are displayed, and you can only choose All Detail if all column types are displayed. The options are:

- To include the header information for a cost account, choose Cost, then Cost Header. To include the detail information for a cost account, choose Cost, and then Cost Detail.
- To include the header information for a revenue account, choose Revenue, then Revenue Header. To include the detail information for a revenue account, choose Revenue, and then Revenue Detail.
- To include the header information for a subcontract account, choose Subcontract, then Subcontract Header. To include the detail information for a subcontract account, choose Subcontract, and then Subcontract Detail.
- To include the header information for all accounts, choose All Accounts, then All Header. To include the detail information for all accounts, choose All Accounts, and then All Detail.

The system completes the appropriate account number fields on the detail lines of the Change Request Entry form.

9. Click the Additional Selections tab and complete the following optional fields:

- Name – Remark
- Change Request Reference Number 1
- Change Request Reference Number 2
- Change Request Reference Number 3

Detail Description	N P	Cost Sts	Cost LT	Cost Original	Cost Quoted	Cost Final	Cost PT
Major Materials	N	Q	KA	56,000.00			

10. Click the Addresses/Dates tab and complete the following optional fields:

- Address Number – Originator
- Address Number – Requested By
- Address Number – Approved by
- Submitted Date
- Approval Date
- Planned Start Date
- Planned Finish Date
- User Date 1
- User Date 2
- User Date 3

11. Click the Category Codes tab and complete the following optional fields, and then click OK:

- Initiated By
- Area
- Category Code – Change Orders 03
- Category Code – Change Orders 04
- Category Code – Change Orders 05
- Category Code – Change Orders 06
- Category Code – Change Orders 07
- Category Code – Change Orders 08
- Category Code – Change Orders 09
- Category Code – Change Orders 10

Note: Category Code – Change Orders fields 6 through 10 are job-specific user defined codes.

Field	Explanation
Job Number	The number of the job, or project, with which the change request is associated. This number must be set up in the Business Unit Master table (F0006).
Change Request	The number assigned to the change request for a particular job.
Status Code	A code that indicates the status of the change request. It is for information only and is not attached to a ledger type. This code should not be confused with the status codes that are defined in the Change Request Detail Status Update table (F53101).
Owner Change Req	<p>A code that indicates whether owner approval is required before work can begin on the change request. You can use this code to indicate whether the work is in or out of scope of the original contract. If the work is out of scope, owner approval is required. This field is for reporting purposes only and does not affect the processing of the change request.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> Y Requires owner approval. N Does not require owner approval. Blank The field is ignored.
Type	A user defined code (53/TY) that indicates the type of change request.

Field	Explanation								
Priority Code	<p>A user defined code (53/PR) that indicates the priority of the change request. Examples of priority codes include the following:</p> <table> <tr> <td>H</td><td>High</td></tr> <tr> <td>M</td><td>Medium</td></tr> <tr> <td>L</td><td>Low</td></tr> <tr> <td>U</td><td>Urgent</td></tr> </table>	H	High	M	Medium	L	Low	U	Urgent
H	High								
M	Medium								
L	Low								
U	Urgent								
Column Version	<p>A code that indicates a specific version. A version is a user defined set of specifications. These specifications control how applications and reports run. You use versions to group and save a set of user defined processing option values, data selections, and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.</p>								
Remark	<p>A generic field that you use for a remark, description, name, or address.</p>								
Reference 1	<p>Any number used to identify a specific source document or originating entry that might be related to a change request.</p>								
Originator	<p>The address book number of the person who originated the change request. The system verifies this number against the Address Book.</p>								
Requested By	<p>The address book number of the person who initiated the change request. The system verifies this number against the Address Book.</p>								
Resp Manager	<p>The address book number of the person who approves the change request.</p>								
Submitted Date	<p>The date that an item is to arrive or that an action is to be complete.</p>								
Approval Date	<p>The date on which the person with the appropriate authority approves a requisition.</p>								
Planned Start Date	<p>The date when the item or line of work is to start.</p>								
Planned Finish Date	<p>The date when the item or line of work is to finish.</p>								
User Date 1	<p>User defined Julian date 1.</p>								
Initiated By	<p>User Defined Codes (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.</p>								

Field	Explanation
Area	User Defined Codes (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.
Category Code 3	User Defined Codes (10 separate codes are allowed) which can be used to generate selective reporting based on user assigned values of these codes.

Related Tasks

Changing account numbers

You can change an account number for a line item only if no detail status code with a ledger type attached to it has been assigned to the account in the line item.

Deleting line item information

You can delete all line item information for a change request only if no ledger types are attached to any detail status codes in any line items, if the change request is not closed, and if a subcontract account on the detail line item has not been committed to the Subcontract Management system.

Deleting change requests

You can delete a change request only if you have not entered information for the change request in any of the following tables:

- Account Balances (F0902)
- Account Ledger (F0911)
- Change Request Details (F5311)
- Planned Change Order (F5314)
- Contract Log (F4303)

Entering Account Distribution Information

You can enter any combination of the following categories of account distribution information for each line item that you create in a change request:

- Cost or budget information that is associated with your company
- Revenue information that is associated with the owner
- Subcontract information that is associated with suppliers

You must enter a detail status code for each type of account (cost, revenue, or subcontract) for each line item. If the detail status code has a ledger type assigned to it, the status code causes the system to update the account balance for that ledger. You set up different status codes for each account type so that

you can use the same account number for cost, revenue, and subcontract accounts, and cause the system to update different ledgers for the accounts.

You can enter account distribution information in either of the following ways:

- Enter multiple accounts. When you enter multiple accounts, the system creates a separate line item for each account that you choose from the G/L Account Search form. The system also supplies the description and unit of measure associated with the account. The system adds the line items starting with the first blank line on the Change Request Entry form.
- Enter accounts to line items one at a time. This option is useful when you want to add accounts after the line items have been created. For example, if you access a line item that has only a cost account, you can manually add the information for a revenue account to the line.

Account distribution information is stored in the Change Request Master table (F5301B) and the Change Request Details table (F5311).

See Also

- *Understanding Detail Status Codes* for information about using detail status codes

Entering account distribution information consists of the following tasks:

- Entering cost account information
- Entering revenue account information
- Entering subcontract account information
- Entering general detail line information



To enter cost account information

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following fields and click Find:
 - Business Unit
2. Choose the request for which you want to enter cost account information and click Select.

3. On Change Request Entry, complete any of the following fields in the detail area and click OK:

If the Change Request Entry form does not display the cost fields, click the Display tab and choose an option that includes cost accounts. In addition, if you selected accounts using the Account Master Pick option on the Form menu, the system completes the Cost Account Number, Cost UM, Cost Description, and Cost G/L Date fields.

If you set the processing options to require account numbers and dates, you must enter account numbers before you can enter amounts and detail status codes.

- Cost Sts
- Cost LT
- Cost Original
- Cost Quoted
- Cost Final
- Cost PT
- Cost Original Unit Rate
- Cost Quoted Unit Rate
- Cost Final Unit Rate
- Cost UM
- Cost Original Quantity
- Cost Quoted Quantity
- Cost Final Quantity
- Cost Account Number
- Cost Description
- Cost Subledger
- Cost SubType
- Cost G/L Date
- Cost Best to Zero

Field	Explanation
Cost Sts	A user defined code that specifies the status of a cost change request for a selected job and line item. This code is used in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Cost LT	A user defined code (09/LT) that identifies a ledger type.
Cost Original	The original amount for a cost change request detail item.
Cost Quoted	The quoted amount for a cost change request detail item.
Cost Final	The final amount for a detail item for a request for a cost change.
Cost PT	The pricing type associated with cost information. Change requests typically use the following pricing types: U Unit Price Change L Lump Sum Change
Cost Original Unit Rate	The original cost of a unit rate that is associated with a change request detail line item.
Cost Quoted Unit Rate	The quoted cost of a unit rate that is associated with a change request detail line item.
Cost Final Unit Rate	The final cost for a unit rate that is associated with a change request detail line item.
Cost UM	A user defined code (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.

Field	Explanation
Cost Original Quantity	The original quantity associated with a cost change request detail line item.
Cost Quoted Quantity	The quoted quantity associated with a cost change request detail line item.
Cost Final Quantity	The final quantity associated with a cost change request detail line item.
Cost Account Number	The combined business unit, object, and subsidiary portions of an account number.
Cost Subledger	A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so on. If you enter a subledger, you must also specify the subledger type.
Cost SubType	A user defined code (00/ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system edits the subledger. This can be either hard-coded or user defined. Valid values include: A Alphanumeric field, do not edit N Numeric field, right-justify and zero fill C Alphanumeric field, right-justify and blank fill
Cost G/L Date	The general ledger date associated with the line item for cost information.
Cost Best to Zero	A code that indicates whether the best cost amount for a change request detail line item should be zero.

To enter revenue account information

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following fields and click Find:
 - Business Unit
 - Change Request Number
2. Choose the request for which you want to enter revenue account information and click Select.

3. On Change Request Entry, complete any of the following fields in the detail area and click OK:

If the Change Request Entry form does not display the revenue fields, click the Display tab and choose an option that includes revenue accounts. If you selected accounts using the Account Master Pick option on the Form menu, the system completes the Revenue Account Number, Revenue UM, Revenue Description, and Revenue G/L Date fields.

- Rev Sts
- Revenue LT
- Revenue Original
- Revenue Quoted
- Revenue Final
- Rev TO
- Rev PT
- Revenue Original Unit Rate
- Revenue Quoted Unit Rate
- Revenue Final Unit Rate
- Revenue UM
- Revenue Original Quantity
- Revenue Quoted Quantity
- Revenue Final Quantity
- Revenue Account Number
- Revenue Description
- Revenue Subledger
- Revenue SubType
- Revenue G/L Date
- Rev Best to Zero
- Contract Number
- Contract Type
- Contract Change Order
- Contract Company
- Owner Number
- Owner Pay Item

- Contract Commit Flag
- Date Contract Pushed

Field	Explanation
Rev Sts	A user defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. This code is used in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Revenue LT	A user defined code (09/LT) that identifies a ledger type.
Revenue Original	The original amount for a revenue change request detail item.
Revenue Quoted	The quoted amount for a revenue change request detail item.
Revenue Final	The final amount for a revenue change request detail item.
Rev TO	A code that specifies whether this change affects contract terms other than price, such as an extension in time or a change in schedule. Codes are: Y Yes, the change does affect terms. N No, the change does not affect terms.
Rev PT	The pricing type associated with revenue information. Change requests normally use the following pricing types: U Unit Price Change L Lump Sum Change

Field	Explanation
Revenue Original Unit Rate	The original revenue unit rate associated with a change request detail line item.
Revenue Quoted Unit Rate	The quoted revenue unit rate associated with a change request detail line item.
Revenue Final Unit Rate	The final revenue unit rate associated with a change request detail line item.
Revenue UM	A user defined code (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.
Revenue Original Quantity	The original quantity associated with a revenue change request detail line item.
Revenue Quoted Quantity	The quoted quantity associated with a revenue change request detail line item.
Revenue Final Quantity	The final quantity associated with a revenue change request detail line item.
Revenue Account Number	The combined business unit, object, and subsidiary portions of an account number.
Revenue Subledger	A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so on. If you enter a subledger, you must also specify the subledger type.
Revenue SubType	A user defined code (00/ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system edits the subledger. This can be either hard-coded or user defined. For example, valid values include: A Alphanumeric field, do not edit N Numeric field, right-justify and zero fill C Alphanumeric field, right-justify and blank fill
Revenue G/L Date	The general ledger date associated with the line item for revenue information.
Rev Best to Zero	A code that indicates whether the best revenue amount for a change request detail line item should be zero.
Contract Number	The contract number used in the Contract Billing system. This number, along with the contract type and contract company, provides the link between the Contract Billing and Change Management systems. It will allow you to copy revenue information for a change request into the Contract Billing system.

Field	Explanation
Contract Type	The contract number used in the Contract Billing system. This number, along with the contract type and contract company, provides the link between the Contract Billing and Change Management systems. It will allow you to copy revenue information for a change request into the Contract Billing system.
Contract Change Order	The change number of the contract. The change order number of the base contract is always initialized to 000. Each time you enter a change order for a contract, the system automatically increases the change order number by one. For example, the base contract is the change order number 000, the first change order is 001, the second is 002, and so on.
Contract Company	<p>A number that, with the document number, document type and G/L date, uniquely identifies an original document, such as invoice, voucher, or journal entry.</p> <p>If you use the Next Numbers by Company/Fiscal Year feature, the Automatic Next Numbers program (X0010) uses the document company to retrieve the correct next number for that company.</p> <p>If two or more original documents have the same document number and document type, you can use the document company to locate the desired document.</p>
Owner Number	The address book number to which the system posts billing and accounts receivable transactions.
Owner Pay Item	Use this field to identify billing lines within a contract. You can enter a 15-character, alphanumeric value in this field. To facilitate reporting and invoice formatting, J.D. Edwards recommends that you use a numeric value for the billing line number.
Contract Commit Flag	A code that indicates whether a detail line item on a change request was committed to the Contract Billing system. The system displays P if the detail line was committed in proof mode, and displays F if the detail line was committed in final mode.
Date Contract Pushed	The date that a revenue detail record was pushed or committed to Contract Billing.

► To enter subcontract account information

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following fields and click Find:
 - Business Unit
 - Change Request Number
2. Choose the request for which you want to enter subcontract information and click Select.
3. On Change Request Entry, complete any of the following fields and click OK:

If the Change Request Entry form does not display the subcontract fields, click the Display tab and select an option that includes subcontract accounts. If you selected accounts using the Account Master Pick option on the Form menu, the system completes the Subcontract Account Number, Subcontract UM, Subcontract Description, and fields.

- Sub Sts
- Subcontract LT
- Subcontract Original
- Subcontract Quoted
- Subcontract Final
- Sub TO
- Sub PT
- Subcontract Original Unit Rate
- Subcontract Quoted Unit Rate
- Subcontract Final Unit Rate
- Subcontract UM
- Subcontract Original Quantity
- Subcontract Quoted Quantity
- Subcontract Final Quantity
- Subcontract Account Number
- Subcontract Description
- Subcontract Subledger
- Subcontract SubType

- Sub G/L Date
- Sub Best to Zero
- Subcontract Contract No
- Subcontract Contract Type
- Subcontract Order Suffix
- Subcontract Company
- Subcontract Line No
- Supplier Number
- Subcontract Commit Flag
- Date Subcontract Pushed

Field	Explanation
Sub Sts	A user defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Subcontract LT	A user defined code (09/LT) that identifies a ledger type.
Subcontract Original	The original amount for a subcontract change request detail item.
Subcontract Quoted	The quoted amount for a subcontract change request detail item.

Field	Explanation
Subcontract Final	The final amount for a subcontract change request detail item.
Sub TO	A code that specifies whether this change affects contract terms other than price, such as an extension in time or a change in schedule. Valid values are: Y Yes, the change affects terms. N No, the change does not affect terms.
Sub PT	The pricing type associated with subcontract information. Change requests typically use the following pricing types: U Unit Price Change L Lump Sum Change
Subcontract Original Unit Rate	The original subcontract unit rate associated with a change request detail line item.
Subcontract Quoted Unit Rate	The quoted subcontract unit rate associated with a change request detail line item.
Subcontract Final Unit Rate	The final subcontract unit rate that is associated with a change request detail line item.
Subcontract UM	A user defined code (00/UM) that identifies the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, hour, and so on.
Subcontract Original Quantity	The original quantity associated with a subcontract change request detail line item.
Subcontract Quoted Quantity	The quoted quantity associated with a subcontract change request detail line item.
Subcontract Final Quantity	The final quantity associated with a subcontract change request detail line item.
Subcontract Account Number	The combined business unit, object, and subsidiary portions of an account number.
Subcontract Subledger	A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number or an address book number. If you enter a subledger, you must also specify the subledger type.
Subcontract SubType	A user defined code (00/ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system edits the subledger. This can be either hard-coded or user defined. Valid values include: A Alphanumeric field, do not edit N Numeric field, right-justify and zero fill C Alphanumeric field, right-justify and blank fill
Sub G/L Date	The general ledger date associated with the line item for subcontract information.

Field	Explanation
Sub Best to Zero	A code that specifies whether the best subcontract amount for a change request detail line item should be zero.
Subcontract Contract No	The contract number used in the Subcontract Management system. This number, along with the contract type and contract company, provides the link between the Subcontract Management system and the Change Management system. It allows you to commit a subcontract account on a detail line on a change request to the Subcontract Management system.
Subcontract Contract Type	A user defined code (00/DT) that is associated with a contract in the Subcontract Management system. This field, along with the contract number and the contract company, links the change request to the Subcontract Management system.
Subcontract Order Suffix	The change order number of the contract. The default change number of the original base contract is 000. Each time you add a change order, the system automatically increments the number by 1. Change order number 1 has a value of 001, change order number 2 has a value of 002, and so forth.
Subcontract Company	A number that, along with contract number and contract type, uniquely identifies a subcontract.
Subcontract Line No	A number that identifies multiple occurrences (such as line numbers on a purchase order or other document). Generally, the system assigns this number, but in some cases you can override a system-assigned number.
Supplier Number	The address book number of the supplier or subcontractor.
Subcontract Commit Flag	A code that indicates whether a detail line item on a change request was committed to the Subcontract Management system. The system displays P if the detail line was committed in proof mode, and displays F if the detail line was committed in final mode.
Date Subcontract Pushed	The date that a subcontract detail record was committed to the Subcontract Management system.

► **To enter general detail line information**

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following fields and click Find:
 - Business Unit
 - Change Request Number
2. Choose the request for which you want to enter general detail line information and click Select.
3. On Change Request Entry, complete any of the following fields and click OK:
 - Required Days
 - Extended Days
 - Quote Due Date
 - Quote Receive Date
 - Chg.Reg Detail Closed

Supplier Number	Required Days	Extended Days	Quote Due Date	Quote Receive Date	Chg.Reg. Detail Closed
3480					0

Field	Explanation
Required Days	The number of days required for the change.
Extended Days	The estimated number of days that the change will extend the work to be performed.
Quote Due Date	The date that a quote is due for a line item in the change request.
Quote Receive Date	The date that a quote is received for a line item in the change request.
Chg.Reg Detail Closed	A code that indicates whether a change request detail line, planned change order, or change order is closed. No further action is necessary. Valid values are: 0 Open 1 Closed

Copying Account Balances

You can copy account balances from one amount type (original or quoted) to another when entering or updating detail line items on change requests. For example, after you enter an amount in the Cost Original field, you can copy the amount to the Cost Quoted field, and can copy the amount in the Cost Quoted field to the Cost Final field. Copying amounts saves data input time and assures that you do not transpose amounts.

When you use the Copy Amounts option on the Form menu, you copy amounts for all account types and for all lines on the change request. For example, if a change request has two detail lines with cost accounts, two lines with revenue accounts, and two lines with both subcontract and revenue accounts, when you use the Original to Quoted copy option from the Form menu, the system copies the amount in the Original field to the Quoted field for all six detail lines, and overwrites any existing amount in the Quoted field with the new amount.

When you use the Copy Amounts option on the Row menu, you copy amounts for all account types on the line that you select. The system overwrites any existing amounts.

Note: The system copies amounts only for the account types whose columns are displayed in the grid. For example, if you display only cost and revenue columns, the system copies amounts for those accounts, but does not copy amounts for subcontract accounts.

► To copy account balances

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following fields and click Find:
 - Business Unit
 - Change Request Number
2. On Change Request Entry, click the Display tab and choose the column types whose accounts you want to copy.

The screenshot shows the 'Change Request Entry' window with the 'Display' tab selected. The 'Columns' section has the following options:

- ☒ All Columns
- ☐ Cost Column
- ☐ Revenue Column
- ☐ Subcontract Column
- ☐ Cost, Revenue Columns
- ☐ Cost, Subcontract Columns
- ☐ Revenue, Subcontract Columns

The 'Open/Closed Change Requests' section has a checkbox for 'Show Open Only' which is currently unchecked. Below the tabs is a table with the following data:

Detail Description	N P	Cost Sts	Cost LT	Cost Original	Cost Quoted	Cost Final	Cost PT
Major Materials	N	Q	KA	56,000.00			

3. To copy all account types on all lines, on Change Request Entry choose Copy Amounts from the Form menu, and then choose either Original to Quoted or Quoted to Final.
4. To copy all account types on a specific line, on Change Request Entry select the line you want to work with.
5. From the Row menu, choose Copy Amounts, and then choose either Original to Quoted or Quoted to Final.

Processing Options for Change Request Entry (P5310)

Edit Tab

Use this processing option to specify system requirements for account numbers and dates. You can use the Account Master Pick option on the Form menu to list and choose valid account numbers for the job. The system also completes the G/L date when you use Account Master Pick. Alternatively, you can use the flashlight button in the cost, revenue, and subcontract Account Number fields to select an account number, or you can manually enter the account number. When you choose an account number or manually enter one, the system completes the G/L Date field if you do not enter a date.

1. Account Numbers and Dates

Use this processing option to specify whether the system always requires master account numbers and G/L dates. Valid values are:

- Blank Require account numbers and dates only if the detail status code for the account is attached to a ledger type.
- 1 Always require account numbers and dates.

Audit Tab

Use this processing option to specify how the system creates audit trail records for modifications to change requests. You can specify that the system creates new records each period that replace existing records, creates new records that are in addition to existing records, or doesn't create any records. This option applies only to change requests that are updated from the Change Request Entry program.

1. Audit Trail - (F0911s)

Use this processing option to specify how the system creates audit trail records in the Account Ledger table (F0911). Valid values are:

- Blank Create audit trail records per period change. The system determines whether an account ledger record that has the G/L date of the period end exists. If a record exists, the system updates the record with the new information. If a record does not exist, the system creates a record.
- 1 Create multiple audit trail records. The system creates new records without determining if other account ledger records exist.
 - 2 Do not create audit trail records.

Default Tab

Use these processing options to specify default values for the Owner Change Required field, the G/L date, subledgers and subledger types, change request

total calculations, automatic PCO numbers, and column versions. You can override the default values on the Change Request Entry form.

1. Owner Change Required

Use this processing option to specify the default value for the Owner Change Required field. If you leave this option blank, the system uses a default value of N.

2. G/L Date

Use this processing option to specify the default value for the G/L date. Valid values are:

Blank Use the date from the Company Fiscal Date Patterns.

1 Use the current system date.

3. Subledger and Subledger Type

Use this processing option to specify the default value for the subledger and the subledger type. Valid values are:

Blank Do not enter a value in the Subledger or Subledger Type field.

1 Enter the change request number in the Subledger field and enter J in the Subledger Type field.

4. Cost, Revenue, Subcontract Totals

Use this processing option to specify how the system calculates change request totals. Valid values are:

- 1 Use original amounts to calculate change request totals.
- 2 Use quoted amounts to calculate change request totals.
- 3 Use final amounts to calculate change request totals.
- 4 Use best amounts to calculate change request totals.

If you leave this option blank, the system uses best amounts to calculate change request totals. The system calculates the best amount based on which of the following combinations of original, quoted, and final amounts you enter for an account type on the Change Request Entry form:

- If you enter a final amount alone or in any combination with other amounts, the system uses the final amount as the best amount
- If you enter a quoted and an original amount, but do not enter a final amount, the system uses the quoted amount as the best amount

- If you enter only an original amount, the system uses the original amount as the best amount

5. Create PCO Number

Use this processing option to specify the number that the system uses as the planned change order (PCO) number when you create a new planned change order. Valid values are:

Blank Use the change request number as the PCO number. The system uses the number of the first change request that you attach to the planned change request.

- 1 Use the next available number as the PCO number.

6. Column Version

Use this processing option to specify the column version that the system uses when you access the Change Request Entry form. If you specify a version, the system retrieves the selected user columns. If you leave this processing option blank, the system displays all columns.

You create column versions to use in the Change Request Entry program by using the Save Columns option on the Form menu.

Note: You can look up the existing column names for Change Management by using the Column Versions – User Overrides option on the Change Management System Setup menu. Inquire with Application equal to the Change Request Entry program (P5310) to find the column versions for the Change Request Entry program.

7. Restrict Column Version

Use this processing option to specify whether to restrict changes and additions to column versions. Valid values are:

Blank Restrict changes and additions to column versions.

- 1 Allow changes and additions to column versions.

Amounts Tab

Use these processing options to specify the following:

- How the system updates cost and revenue amounts from subcontract amounts
- Whether the system displays a warning message when cost or revenue amounts do not equal subcontract amounts

1. Revenue Amounts Updated from Subcontract Amounts

Use this processing option to specify how the system updates revenue amounts from subcontract amounts. When you select option 1, 2, or 3, you cannot complete the revenue fields affected by the options. The system completes the revenue amount and detail status code fields for you. For example, if you choose option 1, the system makes the revenue amount fields uneditable and completes those fields with the amounts you enter in the corresponding subcontract account fields. The system also uses the detail status code you enter for the subcontract account for the revenue detail status code. Valid values are:

Blank The system does not update revenue amounts.

- 1 Revenue amounts equal all subcontract amounts. The system writes the subcontract original, quoted, and final amounts for an account to the original, quoted and final amount fields for the corresponding revenue account.
- 2 Revenue original amount equals subcontract best amount. The system calculates the best amount for the subcontract account and writes it to the Revenue Original field for the corresponding revenue account. If the best amount changes after the system writes to the Revenue Original field, the system updates the field to indicate the current best amount.
- 3 Revenue amounts equal subcontract amounts plus cost amounts. The system adds the amounts for each type of quantity amount for the subcontract and cost accounts and writes them to the original, quoted, and final amount fields for the corresponding revenue account. For example, if you complete the Cost Original and Subcontract Original fields for a detail line, the system completes the Revenue Original field with the total of the Cost Original and Subcontract Original fields.

2. Display when Revenue and Subcontract Amounts Unequal

Use this processing option to specify whether the system displays a message when revenue and subcontract amounts are unequal. Valid values are:

Blank Do not display message.

- 1 Display message.

3. Cost Amounts Updated from Subcontract Amounts

Use this processing option to specify how the system updates cost amounts from subcontract amounts. When you select option 1 or 2, you cannot complete the cost fields affected by the options. The system completes the cost amount and detail status code fields for you. For example, if you choose option 1, the system makes the cost amount fields uneditable and completes those fields with the amounts that you enter in the corresponding subcontract account fields. The system also uses the detail status code that you enter for the subcontract account for the cost detail status code. Valid values are:

Blank The system does not update cost amounts.

- 1 Cost amounts equal all subcontract amounts. The system writes the subcontract original, quoted, and final amounts for an account to the original, quoted, and final amount fields for the corresponding cost account.
- 2 Cost original amount equals subcontract best amount. The system calculates the best amount for the subcontract account and writes it to the Cost Original field for the corresponding cost account. If the best amount changes after the system writes to the Cost Original field, the system updates the field to indicate the current best amount.

4. Cost and Subcontract Amounts Unequal

Use this processing option to specify whether the system displays a message when cost and subcontract amounts are unequal. Valid values are:

Blank Do not display message.

- 1 Display message.

Contract Tab

Use this processing option to specify whether the system returns a contract number for a revenue or subcontract line item. The system returns a contract number according to this processing option when you use the Account Master Pick option on the Form menu.

1. Return Contract Number

Use this processing option to specify whether the system returns a contract number from the Account Master Pick program for a revenue or subcontract line item. A job number match returns a contract for a revenue line item record. A short account number match returns a contract for a subcontract line item record. Valid values are:

Blank Do not return a contract number.

- 1 Return the subcontract number.
- 2 Return the billing contract number.
- 3 Return the subcontract and the billing contract numbers.

Subcontract Commit Tab

Use these processing options to specify how the system commits a subcontract account on a detail line on a change request to the Subcontract Management system.

1. Process Mode

Use this processing option to specify whether the system runs the Subcontract Commit program in proof or final mode. You should run the program in proof

mode before you run it in final mode so that you can view the report that the system generates. After you review the report and make any needed changes, you can run the program in final mode. When you run the program in final mode, the system updates the appropriate tables and generates a report. Valid values are:

Blank Run the program in proof mode.

1 Run the program in final mode.

2. Subcontract Change Order Number

Use this processing option to specify the subcontract change order number that the system assigns to the subcontract account in a detail line on a change request. The subcontract change order number is the number assigned to a change order created in the Subcontract Management system. Valid values are:

Blank Use the number from the existing subcontract change order.

1 Use the value that you specify in the Subcontract Change Order Number processing option.

Note: You can only use the number from the existing subcontract change order if no payments have been made for the subcontract. If payments have been made and you do not specify a value in the Subcontract Change Order Number processing option, the system uses the next available number.

Subcontract Change Order Number

Use this processing option to specify the number of the subcontract change order to which the system commits the subcontract account. The subcontract change order number is the number assigned to a change order created in the Subcontract Management system. If you leave this option blank, the system uses the next available number for the subcontract change order.

3. Subcontract Detail Line Item

Use this processing option to specify how the system updates the Purchase Order Detail table (F4311) when you commit a subcontract account in a detail line to the Subcontract Management system. Valid values are:

Blank Create a new line item for a subcontract for the Purchase Order Detail table.

1 Update an existing line item for a subcontract for the Purchase Order Detail table. The amount committed replaces the current amount for that line item if no payments have been made.

4. G/L Account

Use this processing option to specify the G/L account to be used when the system commits a subcontract account in a detail line to the Subcontract Management system. Valid values are:

Blank Use the existing account.

1 Use the account specified in the AAIs for Change Management.

5. Subcontract Status

Use this processing option to specify the detail status code that the system assigns to a subcontract account in a detail line when you commit the line item to the Subcontract Management system. Verify that the status code has been set up in the Change Request Detail Status Code Update program (P53101).

6. Log Revisions: Log Type

Use this processing option to specify the log type that the system assigns to a log.

7. Log Revisions: Pay Effect

Use this processing option to specify the pay effect code that the system assigns to a log when the system creates a log. Valid codes are:

Y Issue warning message.

N Do not issue warning message.

8. Subcontract/PO Entry (P4310)

Use this processing option to specify the version that the system uses when it commits a subcontract account. The commit process uses server XT4311Z1, which uses the version you choose for P4310.

Before you specify a version, review the version's processing options to ensure that the version meets your requirements. If you leave this option blank, the system uses version ZJDE0015.

Versions Tab

Use these processing options to specify the version that the system uses for applications and reports when you access the Planned Change Order Entry and Change Order Entry programs from the Change Request Entry program. In addition, you can specify the version for the Change Request Summary Report, and specify whether to run the report in summary or detail mode. If you do not specify a version for these options, the system uses version ZJDE0001 for

applications and uses version XJDE0001 for reports. If you do not specify otherwise, the system produces a detail report.

1. Planned Change Order Entry (P5314)

Use this processing option to specify the version that the system uses for change request reports when you access the Planned Change Order Entry program. Before you specify a version, review the version's processing options to ensure that the version meets your needs. The default version is ZJDE0001.

2. Change Order Entry (P5315)

Use this processing option to specify the version that the system uses when you access the Change Order Entry program. Before you specify a version, review the version's processing options to ensure that the version meets your needs. The default version is ZJDE0001.

3. Change Request Summary/Detail Report

Use this processing option to specify whether the system generates the Change Request report as a detail or summary report. Valid values are:

Blank Print a detail report.

1 Print a summary report.

Version

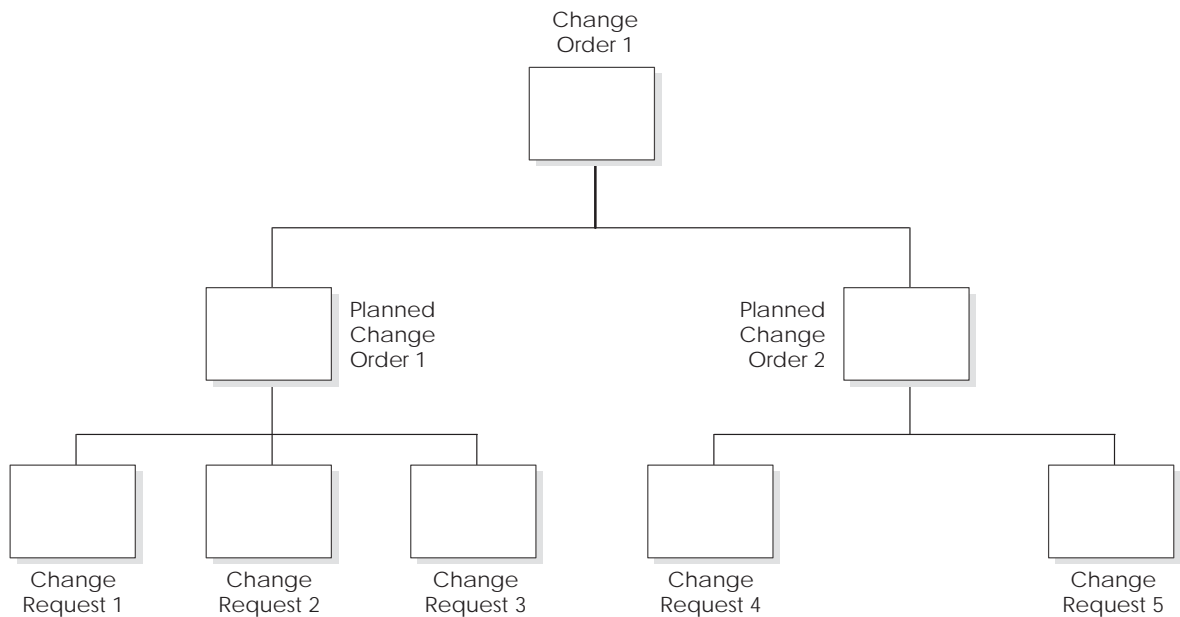
Use this processing option to specify the version that the system uses when you access the Change Request Summary/Detail Report (R534011/R53411).

Before you specify a version, review the version's processing options to ensure that the version meets your needs. If you leave this option blank, the system uses version XJDE0001.

Change Management Hierarchy Creation

If you create a lot of change requests for a job, you might find that keeping track of the change requests or locating information about the changes takes a lot of time. You can make it easier to track and locate information if you attach related change requests to a planned change order (PCO), and attach related PCOs to change orders (COs). When you attach related change requests to PCOs and attach related PCOs to COs, you create a change management hierarchy.

The following graphic illustrates a Change Management hierarchy:



The PCO and CO levels in the hierarchy are optional. If you do not have a lot of change requests, you might not create the PCO level. Similarly, if you do not have a lot of PCOs, you might not create the CO level.



Locating information is easier when you begin your search at a higher level of the hierarchy because you can search through groups of change requests that are related. For example, if you are tracking changes to a job that consists of constructing a new office building, you might attach all change requests for electrical work to one PCO, and attach all change requests for plumbing work to a different PCO. Then, if you need to find information about an electrical contractor, you do not have to search all change requests. You know that all changes related to electrical work are attached to the PCO for electrical work, so you can open that PCO and review only those change requests.

A change management hierarchy also makes it easier to track monetary amounts for related change requests. PCOs show total amounts for the change requests that are attached to them, and COs show total amounts for the PCOs that are attached to them.

Change Management hierarchy creation consists of the following tasks:

- ☐ Understanding status codes for planned change orders
- ☐ Working with planned change orders
- ☐ Working with change orders

See Also

- *Organizing Change Requests* for information about grouping change requests

Understanding Status Codes for Planned Change Orders

You can create a planned change order (PCO) by accessing the Planned Change Order Entry (P5314) program or by using the Create PCO option on the Form menu on the Change Request Entry form. When you create a PCO from Planned Change Order Entry, you must assign to the PCO a status code other than the status code that indicates that the PCO is approved. You can only assign a status code that indicates that the PCO is approved when you modify the PCO.

When you create a PCO from the Change Request Entry program, the system automatically assigns to the new PCO the status code that indicates that the PCO is submitted.

You define the status code that means that the PCO is approved in Planned Change Order Status Setup. You then specify in a processing option that the system use that status code for approvals.

Note: After you update a PCO to the approved status, the only change you can make to the PCO is to close it. You cannot attach additional change requests or change any header information.

See Also

- *Setting Up User Defined Codes for Change Management* for information about setting up status codes for planned change orders

Working with Planned Change Orders

A planned change order (PCO) is a grouping of change requests that enables you to track change requests for a job. You create PCOs so that you can attach related change requests to them to make tracking and locating information easier. Attaching related change requests to a PCO also allows you to approve related change requests simultaneously instead of individually accessing the change requests to approve line items on them.

When you create a PCO, you can immediately attach related change requests to it, or you can attach change requests at a later time.

Working with PCOs consists of the following tasks:

- ☐ Creating a planned change order
- ☐ Attaching change requests to a planned change order

Creating a Planned Change Order

You can create a planned change order (PCO) and then attach related change requests to it. Attaching change requests to a PCO allows you to:

- Easily locate information about the changes
- Track amount totals for the change requests
- Use a global update to move the attached change requests through your approval process



To create a planned change order

From the Change Management Setup menu (G5311), choose Planned Change Order Entry.

1. On Work With Planned Change Orders, complete the following field and click Add:
 - Job Number

2. On Planned Change Order Entry, complete the following fields:

- Planned Change Order

If you leave the Planned Change Order field blank, the system assigns a number.

- Description
- PCO Status Code

Change Request	Req. No.	Header Description	Status Code	Owner Change	Type	Priority Code	Required Days
12		Framing Materials	N	N	C	M	
102		Framing Labor	N	N	C	M	

3. Complete the following optional fields and click OK:

- Required/Extended Days
- Requested By
- Approved By
- Submitted Date
- Approved Date

Field	Explanation
Job Number	The number of the job, or project, with which the change request is associated. This number must be set up in the Business Unit Master table (F0006).
Planned Change Order	A number that uniquely identifies a planned change order for a particular job in the Change Management system. The system also links the planned change order number to the change requests attached to the planned change order so that you can identify the change requests that are associated with the planned change order.
PCO Status Code	A code that indicates the status of a planned change order.
Required/Extended Days	The number of days required for the change.
Requested By	The address book number of the person who initiated the change request.
Approved By	The address book number of the person who approves the change request.
Submitted Date	The date that an item is to arrive or that an action is to be complete.
Date – Approved (Julian)	The date on which the person with the appropriate authority approves a requisition.

Attaching Change Requests to a Planned Change Order

After you enter basic information for a planned change order (PCO), you can attach change requests to it. You can add any number of change requests to a PCO. Since all account types on change requests move through the approval process at the same time when you use the global update function, you should carefully consider which change requests you attach to each PCO.

To attach change requests to PCOs, do one of the following:

- ☐ Attaching existing change requests
- ☐ Creating and attaching new change requests

See Also

- *Organizing Change Requests* for more information about organizing change requests
- *Creating a Planned Change Order* for information about creating planned change orders

Attaching Existing Change Requests

You can attach existing change requests to a PCO when you create the PCO or at a later time. To attach a change request to a PCO, it must have the same job number as the PCO.

► To attach existing change requests

From the Change Management Setup menu (G5311), choose Planned Change Order Entry.

1. On Work With Planned Change Orders, complete the following field and click Find:
 - Job Number
2. Choose the PCO to which you want to attach a change request and click Select.
3. On Planned Change Order Entry, choose Select Change Requests from the Form menu.
4. On Change Request Search, click Find.

Change Request	Req. No.	Description	Status Code	Owner Change	Type	Priority Code	PCO Number
100		Landscaping management		N			
101		Landscaping materials		N			

5. Choose the change request that you want to attach to the PCO and click Select.
6. On Planned Change Order Entry, click OK.

Creating and Attaching New Change Requests

You can create a change request and attach it to a PCO without having to first open the Change Request Entry program.

► To create and attach new change requests

From the Change Management Setup menu (G5311), choose Planned Change Order Entry.

1. On Work With Planned Change Orders, complete the following field and click Find:
 - Job Number
2. Choose the PCO to which you want to attach a change request and click Select.
3. On Planned Change Order Entry, choose an empty row in the detail area.

Change Request	Req. No.	Header Description	Status Code	Owner Change	Type	Priority Code	Required Days
12		Framing Materials	N	N	C	M	
102		Framing Labor		N			

4. From the Row menu, choose Change Request Entry.
5. On Change Request Entry, choose the master accounts that you want to appear on the change request, complete the fields as needed, and then click OK.

The Change Request Entry form closes and you return to the Planned Change Order Entry form.

Change Request Entry - [Change Request Entry]

File Edit Preferences Form Row Window Help

OK Find Can... New... Dis... Abo Links Acct M... Previo... Next OLE ... Internet

Header Additional Selections Addresses/Dates Category Codes Display

Job Number 1620 Birmingham Steel - Memphis Status Code N Notice to Proceed
 Change Request 12 Requote Owner Change Req N Not Required
 Description Framing Materials Type C Contingency
 Required/Extended Days Priority Code M Medium
 Job Totals Best Cost 334,265.00 Revenue 178,150.00 Subcontract 162,920.00
 Totals BEST Cost 56,000.00 Revenue Subcontract

Detail Description	N P	Cost Sts	Cost LT	Cost Original	Cost Quoted	Cost Final	Cost P
Major Materials	N	Q	KA	56,000.00			

6. On Planned Change Order Entry, choose Select Change Request from the Form menu.
7. On the Change Request Search form, complete the following field in the QBE row with the number of the change request that you created:
 - Change Request

Planned Change Order Entry - [Change Request Search]

File Edit Preferences Window Help

Select Find Close Seg... New... Dis... Abo Links Displ... OLE ... Internet

Job Number 1620 Birmingham Steel - Memphis

104	Change Request	Req. No.	Description	Status Code	Owner Change	Type	Priority Code	PCO Number

8. Choose the change request and click Select.

The system adds the change request to the PCO.

See *Entering Basic Change Request Information* and *Entering Account Distribution Information* for more information about creating change requests.

Related Tasks

Deleting a PCO

To delete a PCO, choose Delete PCO from the Form menu. You can delete a PCO only if the PCO has not been approved or closed.

Deleting a change request from a PCO

To delete a change request from a PCO, select a change request on the Planned Change Order Entry form, and then choose Remove Change Request from the Row menu. You can delete a change request from a PCO only if the PCO has not been approved or closed.

Processing Options for Planned Change Order Entry (P5314)

Status Tab

Use these processing options to specify the following:

- The status code that indicates whether the planned change order is approved and that prompts the system to display the Global Status Update form
- The detail status codes to which the system changes cost, revenue, and subcontract accounts when you run the Global Status Update program

1. PCO Approved Status

Use this processing option to specify the status code for an approved planned change order (PCO). When a PCO is at an approved status, the system runs the Global Status Update program. Ensure that the code that you enter has been set up in the user defined codes for Planned Change Order Status (53/PC).

2. Cost Next Status

Use this processing option to specify the next detail status code for a cost account when the system runs the Global Status Update program. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

3. Revenue Next Status

Use this processing option to specify the next detail status code for a revenue account when the system runs the Global Status Update program. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

4. Subcontract Next Status

Use this processing option to specify the next detail status code for a subcontract account when the system runs the Global Status Update program. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

Default Tab

Use these processing options to specify how the system generates the number for a new change order, and to specify whether to create an audit trail.

1. Create CO Number

Use this processing option to specify the number the system assigns to a new change order (CO) when you create the change order. This processing option affects only COs that you create when you create a new CO from the Planned Change Order Entry (P5314) program. Valid values are:

- Blank Use the PCO number. The system uses the number of the first PCO that you attach to the CO as the CO number.
- 1 Use the next available number.

2. Audit Trail – F0911s

Use this processing option to specify how the system creates audit trail records in the Account Ledger table (F0911). This processing option affects changes to account ledgers only when you update the ledgers when you execute a global status update from the Planned Change Order Entry program. Valid values are:

- Blank Create audit trail records per period change. The system determines if an account ledger record that has the G/L date of the period end exists. If a record exists, the system updates the record with the new information. If a record does not exist, the system creates a record.
- 1 Create multiple audit trail records. The system creates new records without determining if other account ledger records exist.
 - 2 Do not create audit trail records.

Versions Tab

Use these processing options to define the following:

- Which version the system uses when you run the Change Request Entry, Change Order Entry, and Planned Change Order Entry programs
- Whether the Change Request Entry, Change Order Entry, and Planned Change Order reports contain detailed or summarized information

1. Change Request Entry Version (P5310)

Use this processing option to specify the version that the system uses when you access the Change Request Entry program.

Before you specify a version, review the version's processing options to ensure that the version meets your needs. The default version is ZJDE0001.

2. Change Order Entry Version (P5315)

Use this processing option to specify the version that the system uses when you access the Change Order Entry program. Before you specify a version, review the version's processing options to ensure that the version meets your needs. The default version is ZJDE0001.

3. Planned Change Order Report

Use this processing option to specify whether the system generates the Planned Change Order report as a detail or summary report. Valid values are:

Blank Print summarized information on the report.

1 Print detailed information on the report.

4. Version

Use this processing option to specify the version that the system uses when you access the Planned Change Order report. Before you specify a version, review the version's processing options to ensure that the version meets your needs. The default version is XJDE0001.

Working with Change Orders

Change orders (COs) are the top level of the Change Management hierarchy. You create COs to group planned change orders (PCOs). COs display amount totals for the PCOs attached to them. Attaching PCOs to a CO makes it easier to locate information about the PCOs.

Working with COs consists of the following tasks:

- ☐ Creating a change order
- ☐ Attaching planned change orders to a change order

Creating a Change Order

You create change orders so that you can group planned change orders.

To create a change order

From the Change Management Setup menu (G5311), choose Change Order Entry.

1. On Work With Change Orders, complete the following field and click Add:
 - Job Number
2. On Change Order Entry, complete the following fields:
 - Change Order

If you leave the Change Order field blank, the system assigns a number.

- Description
- CO Status Code

3. Complete the following optional fields and click OK:

- Requested By
- Approved By
- Required/Extended Days
- Submitted Date
- Approval Date

Field	Explanation
Change Order	A number that uniquely identifies a change order for a particular job in the Change Management system. The system also links the change order number to the planned change orders that are attached to the change order so that you can identify the planned change orders that are associated with the change order.
CO Status Code	A code that indicates the status of a change order.
Requested By	The address book number of the person who initiated the change request.
Approved By	The address book number of the person who approves the change request.
Required/Extended Days	The number of days required for the change.

Field	Explanation
Submitted Date	The date that an item is to arrive or that an action is to be complete.
Approved Date	The date on which the person with the appropriate authority approves a requisition.

Attaching Planned Change Orders to a Change Order

After you enter basic information for a CO, you can attach PCOs to it. You can attach a PCO regardless of its approval status.

To attach planned change orders

From the Change Management Setup menu (G5311), choose Change Order Entry.

1. On Work With Change Orders, complete the following field and click Find:
 - Job Number
2. Choose the CO to which you want to attach a PCO and click Select.
3. On Change Order Entry, choose Select PCO from the Form menu.
4. On Planned Change Order Search, complete the following field and click Find:
 - Planned Change Order Number

PCO Number	PCO Description	PCO Status	PCO Approved Total	Resp Manager	Approved Date	Required Days
4	Interior Finish	S	23,020.00	2111		
10	Roofing Equipment	S				

5. Choose the PCO that you want to attach to the CO and click Select.
6. On Change Order Entry, click OK.

Related Tasks

Deleting a CO

To delete a CO, choose Delete CO from the Form menu. You can delete a CO only if the CO has not been approved or closed.

Deleting a PCO from a CO

To delete a PCO from a CO, select the PCO on the Change Order Entry form, and then choose Remove PCO from the Row menu. You can delete a PCO from a CO only if the CO has not been approved or if it is not closed.

Processing Options for Change Order Entry (P5315)

Status Tab

Use these processing options to specify the following:

- The status code that indicates whether the change order is approved and that prompts the system to display the Global Status Update form
- The detail status codes to which the system changes cost, revenue, and subcontract accounts when you run the Global Status Update program

1. CO Approved Status

Use this processing option to specify the status code for an approved change order (CO). When a CO is at an approved status, the system runs the Global Status Update program. Ensure that the code that you enter has been set up in the user defined codes for Change Order Status (53/CS).

2. Cost Next Status

Use this processing option to specify the next detail status code for a cost account when the Global Status Update program is executed. Confirm that this status code has been setup in the Change Request Detail Status Code Update (P53101) program.

3. Revenue Next Status

Use this processing option to specify the next detail status code for a revenue account when the Global Status Update program is executed. Confirm that this status code has been set up in the Change Request Detail Status Code Update (P53101) program.

4. Subcontract Next Status

Use this processing option to specify the next detail status code for a subcontract account when the Global Status Update program is executed. Confirm that this status code has been set up in the Change Request Detail Status Code Update (53101) program.

5. PCO Header Status

Use this processing option to specify the PCO header status to which the system changes when you approve a change order. Before you approve the change order, you must confirm that the PCO header status code has been set up in the Planned Change Order Status user defined codes (53/PC).

Default Tab

Use this processing option to specify how audit trail records are created.

1. Audit Trail – F0911s

Use this processing option to specify how the system creates audit trail records in the Account Ledger table (F0911). This processing option affects changes to account ledgers only when you update the ledgers when you execute a global status update from the Change Order Entry program. Valid values are:

Blank Create audit trail records per period change. The system determines if an account ledger record that has the G/L date of the period end exists. If a

record exists, the system updates the record with the new information. If a record does not exist, the system creates a record.

- 1 Create multiple audit trail records. The system creates new records without determining if other account ledger records exist.
- 2 Do not create audit trail records.

Versions Tab

Use these processing options to specify which version the system uses when you access the Planned Change Order Entry program and the Change Order report. You also specify whether the associated reports include detailed or summarized information.

1. Planned Change Order Entry

Use this processing option to specify the version that the system uses when you access the Planned Change Order Entry program (P5314). Before you specify a version, review the version's processing options to ensure that the version meets your needs. If you do not specify a version, the system uses version ZJDE0001 for applications, and uses XJDE001 for reports.

2. Change Order Report

Use this processing option to specify whether the report should include summarized or detailed information. Valid values are:

Blank Print summarized information on the report.

- 1 Print detailed information on the report.

3. Version

Use this processing option to specify the version that the system uses when you access the Change Order Report (R53450). Before you specify a version, review the version's processing options to ensure that the version meets your needs. If you do not specify a version, the system uses version XJDE0001.



Change Request Review

As a job moves through your organization's approval process, you might need to review and revise change requests before they are approved. You can review requotes, ledger information, logs, and other information about the change request.

Change request review consists of the following tasks:

- ☐ Reviewing change requests



Reviewing Change Requests

You can review information about change requests in the Change Management system, and also in the Job Inquiry and Account Inquiry programs.

Reviewing change requests consists of the following tasks:

- ☐ Locating information
- ☐ Understanding fields on the Change Request Entry form
- ☐ Reviewing requotes
- ☐ Reviewing logs
- ☐ Reviewing all accounts for a job
- ☐ Reviewing all accounts on a line
- ☐ Reviewing G/L information
- ☐ Reviewing change requests by job

You can access the Job Status Inquiry (P512000) program from the Change Management system. The Job Status Inquiry program lets you select the information you want the system to display, and lets you save your selections as column versions. When you save your selections as column versions, the system makes those versions available for you to use repeatedly.

See *Working with a Job* and *Setting Up Job Status Inquiry* in the *Job Cost Guide* for information about working with the Job Status Inquiry program.

Locating Information

When reviewing change requests, you will often need to locate specific information. The following table lists some of the information that you might need to find, the form that contains the information, or the procedure that will help you to navigate to the information.

The detail status code that moves the line item to the approved stage	See <i>Setting Up Change Request Detail Status Codes</i> to access the Work With Status Codes form.
The ledger type associated with a detail status code	See <i>Setting Up Change Request Detail Status Codes</i> to access the Work With Status Codes form. Click Find to display existing codes.
The master account associated with a line item	View individual accounts or all accounts for a change request or job. <ul style="list-style-type: none"> To view the account for a specific line item, on Change Order Entry, choose G/L Accounts from the Row menu. To view accounts for all lines in a change request or in a job, choose Account Inquiry from the Change Management Inquiries menu.
The amount type (original, quoted, final, best) the system is totaling	Review the Cost, Revenue, Subcontract Totals processing option for the Change Request Entry program.
The approval stage for all change requests for a job	You can view the detail status codes for cost, revenue, and subcontract accounts. The status codes represent the approval stage of the change request. To view the detail status codes, from the Change Management Inquiries menu, choose Account Inquiry. Complete the job number, and then click Find to display all change requests and their codes.
The original, quoted, and final amounts for the change request	To easily view amounts for all types of accounts on a change request, choose Additional Details from the Row menu on Change Request Entry and view the amounts on the Cost Details, Revenue Details, and Subcontract Details tabs.

The change requests that are not attached to a PCO	The change requests not attached to a planned change order appear on the Change Request Search form. On Planned Order Entry, choose Select Change Req. from the Form menu, then click Find on the Change Request Search form.
The column versions available for change request entry	Choose Column Versions – User Overrides from the Change Management System Setup menu. On Work With User Overrides, enter P5310 in the QBE field for Application, and then press Enter.
The invoice number and who funds were paid to or received from	On Change Request Entry, select a line item, then choose G/L Accounts from the Row menu.
The original budget for an account	You can compare your original job budget for an account to the amounts charged to the account by accessing the account ledger. Choose G/L Inquiry from the Row menu, then choose the type of account you want to view.

Understanding Fields on the Change Request Entry Form

The system completes some of the fields on the Change Request Entry form. In addition, the columns you choose to display in the Change Request Entry form affect the information that is available for you to review. The following table lists information about some of these fields.

Requote	Shows the number of the requote currently displayed.
Blank field to the right of Requote	Shows the date the requote was created.
Job Totals Best	Shows the best total amounts for the cost, revenue, and subcontract accounts for the entire job.
Totals (Original, Quoted, Final, or Best)	Shows the total amounts for the cost, revenue, and subcontract accounts for the change request currently displayed. If the Cost, Revenue, or Subcontract fields to the right of the Totals field are blank, then the change request does not have amounts for those fields. You choose whether the system displays the total of the original, quoted, final, or best amounts by setting a processing option.

Column Version

Displays the name of the column version you entered on the Default tab for the processing options.

Grid Column fields

The columns you select on the Display tab on the Change Order Entry form affect which columns you can work with when:

- Entering account information
- Copying amounts
- Using the Global Status Update program
- Selecting accounts from the G/L Account Search form
- Selecting accounts from the G/L Inquiry option on the Row menu
- Exiting to the Subcontract Management system from the Change Request Entry form

For example, if you select Cost Columns, the system displays only cost account information on the Change Request Entry form, and does not let you inquire about revenue accounts or exit to the Subcontract Management system.

Unavailable fields

The system grays-out fields to which changes are not allowed. For example, after you commit a subcontract account to the Subcontract Management system in final mode, the system makes all subcontract fields unavailable for editing.

Reviewing Requotes

When you access the Change Request Entry form, the system displays the current change request. You can view previous values for the change request in the order in which they were created, from the most current version to the oldest, by using the Prior Requote option. After you use the Prior Requote option, you can view the previous versions, from the oldest to the newest, by using the Next Requote option.

To review requotes

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.

3. On Change Request Entry, choose the line item that you want to review, and then choose one of the following options on the Form menu:
 - To review the previous requote for the change request, choose Requotes, and then Prior Requote.
 - To review requotes for the change request that were created after the original requote, choose Requotes, and then Next Requote.

Reviewing Logs

The system automatically creates a log when you commit a subcontract account to the Subcontract Management system. You can review the log and make any necessary changes.

► To review logs

From the Change Management Inquiries menu (G5312), choose Log Revisions.

1. On Change Management Log Details, complete the following fields and click Find:
 - Job Number
 - Change Request

Log Type	Description	Log Status	Explanation -Remark-	Required Date	Pay Effect
T	Payment for framing	N	CR: 0000009		N

2. Review the information.

Reviewing All Accounts for a Job

You can view all accounts for all change requests for a job by reviewing the Change Request by Account report. When you produce this report you can:

- Specify what information is contained in the report by selecting different report versions in the Change Request Entry processing options
- Produce this report as a detail or a summary report by setting a processing option
- Review the report online or print the report



To review all accounts for a job

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, choose Print Summary/Detail from the Form menu.
4. On Report Output Destination, select a destination and click OK.

Reviewing All Accounts on a Line

You can view all accounts on a line to review account details, such as:

- The account number and subledger numbers
- The original, quoted, final, and best amounts for all accounts
- The contract number and the supplier

Information about cost, revenue, and subcontract accounts is displayed on separate tabs to make viewing account numbers and totals easier.

► **To review all accounts on a line**

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, choose the detail line that you want to review, and then choose Additional Details from the Row menu.
4. On Cost, Revenue, Subcontract Details, click the appropriate tabs to review account information.

	QUANTITY	UM	PT	UNIT PRICE	AMOUNT	DATE
ORIGINAL		HR			8,500.00	6/30/05
QUOTED		Hour			8,500.00	6/30/05
FINAL					8,700.00	6/30/05
BEST					8,700.00	

Reviewing G/L Information

You can review general ledger information for each account type on a detail line by using the G/L Inquiry option. The G/L Inquiry option lets you review all general ledger information including:

- The account number
- Posted and unposted amounts
- The original budget for the account
- The invoice number, purchase order number, and document number

► To review G/L information

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, choose the detail line that you want to review, and then choose one of the following options on the Row menu:
 - To review cost information, choose G/L Inquiry, and then Cost G/L
 - To review revenue information, choose G/L Inquiry, and then Revenue G/L
 - To review subcontract information, choose G/L Inquiry, and then Subcontract G/L

Do Ty	Doc Number	Doc Co	G/L Date	Explanation	LT 1 Amount	LT 1 Debit	P C	LT2 PC
CX	3361	00050	6/30/05		2,350.00	2,350.00	P	
				Column Total	2,350.00	2,350.00		
				Ledger Total	2,350.00	2,350.00		
				Original Budget				

See *Reviewing Account Ledgers* in the *General Accounting Guide* for more information about the general ledger.

Reviewing Change Requests by Job

You can display the accounts on a change request for a job by the:

- Account type

- Account code
- Ledger type
- Supplier

Specifying how the system displays change request information lets you quickly find the information that you want.

► To review change requests by job

From the Change Management Inquiries menu (G5312), choose Account Inquiries.

On Work With Account Change Request Inquiry, complete the following fields and click Find:

- Job Number
- From Cost Code
- To Cost Code
- From Cost Type
- To Cost Type
- Supplier
- Ledger Type

Change Request	Description	Req. No.	Line Number	Cost ST	Cost LT	Cost Account
4	Framing Materials		1.000	A	JA	1620.1351.04040020
8	Roofing Materials		1.000	A	JA	1620.1351.04040020

Field	Explanation
Job Number	The number of the job, or project, with which the change request is associated. This number must be set up in the Business Unit Master table (F0006).
From Cost Code	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.
To Cost Code	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.
From Cost Type	<p>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.</p> <p>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.</p>
To Cost Type	<p>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.</p> <p>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.</p>
Address Number – Supplier	The address book number of the supplier or subcontractor.
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.

Processing Options for Change Request Account Inquiry (P53220)

Versions Tab

Use these processing options to specify which version the system uses when you access the Change Request Entry, Change Order Entry, and Planned Change Order programs.

1. Change Request Entry (P5310)

Use this processing option to specify the version that the system uses when you access the Change Request Entry program. Before you specify a version, review the version's processing options to ensure that the version meets your needs. The default version is ZJDE0001.

2. Planned Change Order Entry (P5314)

Use this processing option to specify the version that the system uses when you access the Planned Change Order Entry program. Before you specify a version, review the version's processing options to ensure that the version meets your needs. The default version is ZJDE0001.

3. Change Order Entry (P5315)

Use this processing option to specify the version that the system uses when you access the Change Order Entry program. Before you specify a version, review the version's processing options to ensure that the version meets your needs. The default version is ZJDE0001.



Revising Change Requests, PCOs, and COs

As change requests, planned change orders (PCOs), and change orders (COs) move through your organization's approval process, you will need to make changes to them. You will often update amounts and status codes, and maintain an audit trail.

Revising change requests, PCOs, and COs consists of the following tasks:

- ☐ Revising change requests
- ☐ Revising planned change orders
- ☐ Revising change orders
- ☐ Approving change request accounts, PCOs, and COs

Approval Process

You use the J.D. Edwards Change Management system to track changes to change requests as the requests move through your organization's approval process. The Change Management system lets you automatically update account ledgers and subcontracts. The system also calculates your best amount.

A typical approval process consists of the following tasks:

- Review existing change requests, PCOs, and COs
- Modify change requests
- Determine final amount
- Update detail status codes
- Determine best amount
- Send information to the Subcontract Management system
- Approve PCOs and COs
- Close lines on the change requests
- Close PCOs and COs



Review Existing Change Requests, PCOs, and COs

Your organization might require you to periodically review change requests to determine which change requests need to be updated. You might print reports to review, review selected change reports online, or use some other method to review change requests. You can review related change requests by reviewing the PCO to which they are attached. You can also generate PCO reports to review information about the change requests attached to the PCO.

Modify Change Requests

As a job progresses, you might make many changes to a change request. Among other changes, you can change the quoted and final amounts for accounts, add or delete line items from a change request, and update detail status codes. When you change account distribution information for a change request, you can create a requote. A requote is a version of the change request. If you make numerous changes to the account distribution information, you might create many requotes. You can use the requotes to review a history of the changes made.

Determine Final Amount

Before you approve a change request, you typically determine a final amount for each account type in the change request. You determine final amounts by completing the Cost Final, Revenue Final, and Subcontract Final fields on the Change Request Entry form. You can complete the fields manually, or you can use the Copy Amount option from the Form or Row menu.

You do not have to have final amounts to approve a change request; however, each account on each change request that is attached to a PCO must have a final amount before you can approve the PCO. The system requires final amounts when you approve a PCO because the system prompts you to run a global status update for the accounts on the change requests that are attached to the PCO.

See Also

- *Copying Account Balances* for more information about copying amounts

Update Detail Status Codes

As you move a change request through various approval stages, you constantly update its status using detail status codes. You define detail status codes in the Change Request Detail Status Update table (F53101). A detail status code defines the stage in the approval process for each account type (cost, revenue, subcontract) in a line item of a change request. Each account type on a detail line can be at a different approval stage. When you set up detail status codes, you can associate ledger types with the detail status codes that represent later stages in the process. Assigning one of these detail status codes to an account, automatically updates the ledger associated with the detail status code. Detail

status codes have other attributes assigned to them to define such things as whether the code represents cost, revenue, or subcontract information and whether the amount that will update the ledger is the original, quoted, final, or best amount.

Determine Best Amount

You can set up codes for original, quoted, final, and best amounts when you set up detail status codes. The system calculates the best amount based on which of the following combinations of original, quoted, and final amounts you enter for an account type on the Change Request Entry form:

- If a final amount is entered alone or in combination with other any amounts, the final amount is the best amount.
- If a quoted and an original amount are entered but no final amount is entered, the quoted amount is the best amount.
- If only an original amount is entered, the original amount is the best amount.

The system automatically and continuously determines the best amount.

See Also

- *Setting Up Change Request Detail Status Codes* for more information about setting up the codes for best amounts

Send Information to the Subcontract Management System

You can send information about a subcontract account on a change request to the relevant contract in the Subcontract Management system at any time during the approval process. Typically, this is done after final approval. The information that is used to amend a job's projected final cost and subcontract commitments is also retained in the Change Management system.

See Also

- *Committing Subcontracts to Subcontract Management* for more information about committing detail lines on a change request to the Subcontract Management system

Approve PCOs and COs

One of the benefits of attaching related change requests to a PCO is that you can approve all lines on all change requests at the same time. When you approve a PCO, the system displays the Global Status Update form. By completing the fields on the Global Status Update form, you can update the status of some or all

of the accounts on the change requests attached to the PCO. After you approve a PCO, the only change you can make to it is to close it.

When you approve a CO, the system displays the Global Status Update form. By completing the fields on the Global Status Update form, you can update the status of some or all of the accounts on the associated change requests. After you approve a CO, you cannot make any changes to it other than closing it.

Close Lines on the Change Request

After you approve the accounts on the detail lines of a change request, you can close the detail lines. Typically, you close the line when all accounts on the line are at their final stage in the approval process. After you close a line, you cannot make any modifications to it. You can, however, attach change requests that have closed lines to PCOs.

Closing lines on change requests makes it easier to view the lines that are still open. If you choose the Show Open Only option on the Display tab of the Change Request Entry form, the system displays only the lines that are open.

Close PCOs and COs

You can close a PCO when you finish working with the change requests that are attached to it. Typically, you close the PCO when all accounts on the attached change requests are at their final stage in the approval process. When you close a PCO, the system closes all lines on the attached change requests. After you close a PCO, you cannot make any changes to it.

You can close a CO when you finish working with the PCOs attached to it. Typically, you close the CO when you close all of the PCOs that are attached to it. After you close a CO, you cannot make any changes to it.

Revising Change Requests

Information in a change request is often revised during the life cycle of the change request. For example, you might change amounts or dates, update status codes, and add lines to a change request. When you revise account distribution information, you can create a requote to record the new information. You use requotes to track and review the history of the changes made to the account information. After a detail line has moved through the approval process to its final stage, you can close the line so that no further changes can be made to it.

You can add lines to any change request, even those that have all lines closed. When you add or delete line items from change requests, the changes appear in the planned change order (PCO) to which the change request is attached. The system displays a warning message when you make any change to a change request that is attached to a PCO.

Note: You cannot revise a change request that is attached to a closed PCO or CO.

See Also

- *Entering Change Requests* for information about adding and deleting line items

Revising change requests consists of the following tasks:

- ☐ Revising amounts
- ☐ Updating detail status codes
- ☐ Generating requotes
- ☐ Closing detail lines on change requests

Revising Amounts

You can revise the amounts in the detail lines on a change request, and you can enter amounts in fields that are not yet completed. You can update or enter amounts either manually or by using the Copy Amounts option. As you revise amounts, you can generate requotes to maintain a copy of each version of the change request.

See Also

- *Copying Account Balances* for information about using the Copy Amounts option
- *Generating Requotes* for information about creating requotes

► To revise amounts manually

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, enter amounts for any of the following:
 - Cost Original
 - Cost Quoted
 - Cost Final
 - Revenue Original
 - Revenue Quoted
 - Revenue Final Quantity
 - Subcontract Original
 - Subcontract Quoted
 - Amount Final for Subcontract

Note: The system does not prevent you from changing an amount for an approved account. If you change an amount for an account that has a detail status code that caused the system to update a ledger, the system will update the ledger with the new amount or make an adjusting entry to the ledger.

Field	Explanation
Job Number	The number of the job, or project, with which the change request is associated. This number must be set up in the Business Unit Master table (F0006).
Cost Original	The original amount for a cost change request detail item.
Cost Quoted	The quoted amount for a detail item for a request for a cost change.

Field	Explanation
Cost Final	The final amount for a detail item for a request for a cost change.
Revenue Original	The original amount for a revenue change request detail item.
Revenue Quoted	The quoted revenue amount for a line item in the change request.
Revenue Final Quantity	The final revenue quantity for a line item in the change request.
Subcontract Original	The original amount for a subcontract change request detail item.
Subcontract Quoted	The quoted subcontract amount for a line item in the change request.
Subcontract Final	The final subcontract amount for a line item in the change request.

Updating Detail Status Codes

You can revise detail status codes at any time during the approval process. You usually set up detail status codes for each stage of your organization's approval process. If you associate a ledger type with a detail status code, you can update the ledger when you update an account's detail status code.

You can update detail status codes manually or by using the Global Status Update program. When you use the Global Status Update program, you can update all status codes, or you can specify the types of accounts for which you want to update the detail status code.

To update status codes, do one of the following:

- Update detail status codes manually
- Update detail status codes using Global Status Update

See Also

- *Setting Up Change Request Detail Status Codes* for information about creating detail status codes

Technical Considerations

Updating ledgers

If you associate a ledger type with a detail status code, the system updates the ledger when you enter a detail status code in the Global Status Update program or in the Change Request Entry program. If you update the status field with a status code that updates a different ledger, the system updates the second ledger but does not reverse the entry to the first ledger. You must reverse the entry manually.

► To update detail status codes manually

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, complete any of the following fields to specify a different detail status code, and then click OK:
 - Cost Sts
 - Rev Sts
 - Sub Sts

If a different ledger type is associated with the new detail status code, the system updates the appropriate ledgers.

Field	Explanation
Cost Sts	A user defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Rev Sts	A user defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Field	Explanation
Sub Sts	A user defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

► To update detail status codes using Global Status Update

From the Change Management Setup menu (G5311), choose Change Request Entry.

- On Work With Change Requests, complete the following field and click Find:
 - Job Number
- Choose a change request and click Select.

- On Change Request Entry, choose Global Status from the Form menu.

4. On Global Status Update, complete the following fields to specify the status that you want to change from and the status that you want to change to:
 - Cost Status
 - Revenue Status
 - Subcontract Status
 - Status Code

If you leave the default value (*) in the From field for an account type, the system changes all accounts of that type to the detail status code you specify in the To field.

Field	Explanation
Cost Status	A user defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Revenue Status	A user defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

Field	Explanation
Subcontract Status	A user defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Change Req. Header Status	A code that indicates the status of the change request. It is for information only and is not attached to a ledger type. This code should not be confused with the status codes that are defined in the Change Request Detail Status Update table (F53101).

Generating Requotes

When you change account distribution information in a line on a change request, you can save the change as a new version of the change request. The new version is called a requote. You can use requotes to track changes to the account distribution information in a change request because the system saves each requote. You can view the sequence of requotes for a change request to determine what changes were made and the date that the changes were made.

Requotes save a copy of changes that are made to detail lines. They do not save changes that are made to the header.

To generate requotes

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, make the needed changes to the account distribution information.

4. From the Form menu, choose Requotes, and then Generate Requote.

The system saves the changes and assigns the next sequential number to the requote.

Note: If you make changes to account distribution information, you can overwrite the previous information by clicking OK instead of using the Requote function.

Technical Considerations

Changing requests

You can only change the last requote.

Using Copy Amount with Requotes

If you update amounts using Copy Amount from either the Form or the Row menu, you must click OK before choosing Requote from the Form menu.

Deleting requests

If you have generated more than one requote for a job and change request number and you want to delete any of them, you must delete requests in the following sequence:

- Delete the most current requote
- Delete each previous requote in the order in which it was created

Deleting a requote does not affect any other requests.

Closing Detail Lines on Change Requests

After you approve the accounts on the detail lines of a change request, you can close the line items. Typically, you close the line when all accounts on the line are at their final stage in the approval process. After you close a line, you cannot make any modifications to it.

You close lines on change requests to prevent further changes to the line. Closing lines on change requests also makes it easier to view the lines that are still open. If you choose the Show Open Only option on the Display tab of the Change Request Entry form, the system displays only the lines that are open.

You can close lines on change requests individually, or you can close all lines on a change request when you close the PCO to which the change request is attached.

To close detail lines on a change request

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, complete the following field for the detail line that you want to close:
 - Close Flag

The system shades the line and makes the fields uneditable.

Field	Explanation
Close Flag	A code that indicates whether a change request detail line, planned change order, or change order is closed. No further action is necessary. Valid values are: <ul style="list-style-type: none"> 0 Open 1 Closed

Revising Planned Change Orders

As change requests move through your approval process, you will often need to review information about the change requests. You can more easily review related change requests by reviewing the planned change order (PCO) to which they are attached. After reviewing a PCO and the change requests that are attached to it, you can revise the PCO.

You can revise a PCO until you approve it. After you approve it, the only change you can make to the PCO is to close it. You use a processing option to specify the status code that means the PCO is approved.

When you revise planned change orders, you can:

- Add or delete change requests
- Change all header fields except:
 - The Planned Change Order field
 - Fields that are uneditable (grayed-out)
- Close the planned change order

See Also

- *Attaching Change Requests to a Planned Change Order* for more information about adding or deleting change requests
- *Approving Planned Change Orders* for more information about status codes



To revise planned change orders

From the Change Management Setup menu (G5311), choose Planned Change Order Entry.

1. On Work With Planned Change Orders, complete the following field and click Find:
 - Job Number
2. Choose a planned change order and click Select.
3. On Planned Change Order Entry, make the needed changes and click OK.

Revising Change Orders

You can revise change orders (COs) until you approve them. After you approve a CO, the only change you can make to the CO is to close it. You use a processing option to specify the status code that means the CO is approved.

When you revise change orders, you can:

- Add or delete planned change orders
- Change all header fields except:
 - The Change Order Number
 - Fields that are uneditable (grayed-out)
- Close the change order

See Also

- *Approving Change Orders* for more information about the status codes
- *Attaching Planned Change Orders to a Change Order* for information about adding or deleting planned change orders



To revise change orders

From the Change Management Setup menu (G5311), choose Change Order Entry.

1. On Work With Change Orders, complete the following field and click Find:
 - Job Number
2. Choose a change order and click Select.
3. On Change Order Entry, make the needed changes and click OK.

Approving Change Request Accounts, PCOs, and COs

You approve accounts on change requests, PCOs and COs so that you can move them to the next stage in your organization's change management process.

Approving accounts on a change request means that you update the detail status code for the account to a status that represents an approval. If you attached ledger types to the detail status codes that represent approvals, the system updates the ledgers with the amount and type specified by the detail status code when you approve the change request. If you did not attach ledger types to detail status codes, your organization's approval process might require you to manually update certain ledgers, notify others of the approval, or take some other action.

When you approve PCOs and COs, you move them to the next stage in your approval process. When you approve a PCO, the system automatically changes the status of all accounts on the change requests attached to the PCO to the statuses you specify in the Global Status Update program. When you approve a CO, the system automatically changes the status of the attached PCOs and all changes all statuses on the change requests attached to the PCOs to the statuses you specify in the Global Status Update program.

In general, you approve the accounts on a change request and approve PCOs and COs only when you enter final amounts for the accounts and you do not expect any other changes to the accounts.

Approving change requests, PCOs, and COs consists of the following tasks:

- ☐ Understanding global status updates
- ☐ Approving accounts on change requests
- ☐ Approving planned change orders
- ☐ Approving change orders

See Also

- *Approval Process* for additional information about the approval process

Understanding Global Status Updates

You can update the detail status codes for the accounts on change requests individually, or you can use the Global Status Update program to update them. You access the Global Status Update program from the Form menu on the Change Order Entry form. The system also displays the Global Status Update form when you approve a planned change order (PCO) or a change order (CO). Regardless of whether you access the Global Status Update form from the Change Request Entry program, the Planned Change Order Entry program, or the Change Order Entry program, you use the Global Status Update form to update the detail status codes for the accounts on change requests.

You can change the status of specific types of accounts (cost, revenue, and subcontract). You can change all accounts of a type to the same new status, or change only the accounts that have the same status code to a new status. For example, you can change *all* cost accounts to approved, or you can change to approved only the cost accounts that currently have a status of pending. If you specify that only the cost accounts with a specified status are updated, the system does not update the cost accounts that have a different status.

Change Request Entry - [Global Status Update]

File Edit Preferences Window Help

OK Cancel Dismiss Abort Links Display OLE Internet

Job Number 1620 Birmingham Steel - Memphis

CR Number 12 Framing Materials

CR: Updates all status' for each grid row.
PCO/CO: Updates status' for all attached change requests.

UPDATE STATUSES:	From	To
Cost Status	*	A
Revenue Status	*	A
Subcontract Status	*	A
Change Req. Header Status	*	A

Specifying Which Accounts to Update

The system changes only the accounts that are at the status that you specify in the From fields to the status specified in the To fields. If you do not complete the From fields with a value other than *, the system changes all accounts to the status that you specify in the To fields. If you do not complete the To field for a specific account type, the system does not change any statuses for that account type.

For example, assume that two cost accounts have a status of “pending cost confirmation” (detail status code = C) and two cost accounts have a status of “pending owner approval” (detail status code = P). For this example, assume that the detail status code for an approval is A. If you enter C in the Cost Status From field and enter A in the Cost Status To field, the system updates only the accounts that are pending cost confirmation. If you do not change the detail status code in the Cost Status From field to a value other than *, but do complete the Cost Status To field with an A, the system changes all four accounts to approved. If you do not complete any of the cost status fields and instead complete only revenue fields, the system changes revenue statuses but does not change any cost statuses.

Update Considerations

When you use the Global Status Update program, you should consider the following:

- You must specify in the To column a detail status code for each account type that you want to change to a new code. For example, if you want to change the detail status code for cost and revenue accounts, you must specify the new code in the To column for the Cost Status and Revenue Status fields. You do not have to specify a detail status code in the Subcontract Status field in the To column if you do not want to change the status of any subcontract accounts.
- You do not have to specify a detail status code in the From column for a specific type of account if you want the system to change the code for all accounts of that type. For example, if you want the system to change the detail status code for all cost accounts to A regardless of the current detail status code, you can enter A in the To column for the Cost Status field and leave the wildcard character (*) in the From column.
- You do not have to specify a detail status code in the To column for account types that you do not want to change. For example, if you do not want to change the detail status code for any revenue accounts, leave the To column for the Revenue Status field blank.
- You can use processing options to specify the default value for the detail status code you want to apply to each account type. You can set different values for the Planned Change Order Entry and the Change Order Entry programs. In addition, you can override the default value in the Global Status Update form.

When you use the Global Status Update program, the system:

- Changes the detail status codes to the codes that you specify in the To column for each account type. You can specify that the system change the detail status code to a code representing an approval, or you can specify any other valid detail status code.
- Updates the ledger when you click OK on the Global Status Update form if you change to a detail status code that has a ledger type associated with it.
- Changes all accounts of a type when you do not specify a detail status code in the From column. For example, if you leave the wildcard character (*) in the From column for the Revenue Status field, the system changes all revenue accounts to the status that you specify in the To column for the Revenue Status field.
- Changes only accounts that are at the status specified in the From column when you enter a value in the From column.
- Changes the header status for the change request when you specify a new status in the appropriate Header Status field.

Technical Considerations

Closed lines

The Global Status Update program does not update the detail status codes for details lines that are closed or lines that are committed to the Subcontract Management system.

Final amounts

Every account on every line of all change requests attached to a planned change order must have a final amount entered before you can access the Global Status Update program from the Planned Change Order Entry or the Change Order Entry program.

Multiple updates

You can update the detail status code as often as necessary. The system does not prevent you from changing the code from approved to another code.

Approving Accounts on Change Requests

You can approve the accounts on change requests individually, or you can use the Global Status Update program to approve all accounts of a specified type on a change request. The method that you use depends on how you organized your change requests and on whether all accounts of a specified type on a change request are ready to be approved at the same time.

If all accounts of a specified type are currently at the same status and are ready to be approved, you can use the Global Status Update program to quickly update all accounts to a detail status code that represents an approval. If you need to approve only a few accounts, or if not all of the accounts of a certain type are ready to be approved, you should update each account individually.

See Also

- *Organizing Change Requests* for information about organizing change requests
- *Understanding Global Status Updates* for information about using the Global Status Update program to approve change request accounts

Approving Accounts when Approving PCOs and COs

After you create a PCO and attach change requests to it, you can use several methods to approve the accounts on the change requests. You can individually change the detail status codes for the lines on the change request, or you can approve all change requests attached to a PCO by approving the PCO or by approving the CO to which the PCO is attached. When you approve the PCO or CO, the Change Management system updates the accounts that are assigned to the status code that you use for approval. Before you can approve a PCO, you must enter final amounts for the change requests attached to the PCO.

If all accounts for all lines on all change requests that are attached to a PCO have final amounts and are ready to be approved, you can update their detail status codes by approving the PCO to which they are attached. If some of the accounts are not ready to be approved or do not have final amounts, individually update the accounts through the Change Request Entry program.

See Also

- *Approving Planned Change Orders* for more information about approving planned change orders

Approving Accounts from the Change Request Entry program

You can approve accounts on change requests individually, or you can use the Global Status Update program to approve multiple accounts.

To approve accounts from the Change Request Entry program, do one of the following:

- Approve individual accounts
- Approve multiple accounts

To approve individual accounts

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Order Entry, change any of the following fields to a status that represents that the account is approved, and then click OK:
 - Cost Sts
 - Rev Sts
 - Sub Sts

Field	Explanation
Job Number	The number of the job, or project, with which the change request is associated. This number must be set up in the Business Unit Master table (F0006).
Cost Sts	A user defined code (53/ST) that specifies the status of a cost change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Rev Sts	A user defined code (53/ST) that specifies the status of a revenue change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).
Sub Sts	A user defined code (53/ST) that specifies the status of a subcontract change request for a selected job and line item. The system uses this code in the approval process of the change request, and determines which ledger type is updated in the Account Balances table (F0902).

► To approve multiple accounts

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, choose Global Status from the Form menu.
4. On Global Status Update, change the following fields to reflect the status that you want to change from and the status you want to change to and click OK:
 - Cost Status
 - Revenue Status
 - Subcontract Status
 - Status Code

If you leave the asterisk (*) in the From field for an account type, the system changes all accounts of that type to the detail status code that you specify in the To field.

UPDATE STATUSES:	From	To
Cost Status	*	A
Revenue Status	*	A
Subcontract Status	*	A
Change Req. Header Status	*	A

Approving Planned Change Orders

You can approve PCOs after all information on them is complete. You approve a PCO by changing the status code for the PCO to the code specified in the processing options as the code that indicates that the PCO is approved.

In general you change the PCO status to approved only if all accounts on the attached change requests are also approved or are ready to be approved when you approve the PCO. Before you can approve a PCO, all accounts on all change requests attached to the PCO must have a final monetary amount.

When you approve a PCO, the system displays the Global Status Update form. The Global Status Update form lets you specify which account types on the change requests attached to the PCO you want to update to an approved status.

Note: After you approve a PCO, you cannot make any changes to it.

See Also

- *Entering Account Distribution Information* for information about completing the final amount fields
- *Understanding Global Status Updates* for more information about using the Global Status Update form

Before You Begin

- ☐ Set the Approved PCO Status processing option so that the system recognizes which code you want to use to indicate that a PCO is approved. If you do not set this processing option, the system does not know which code is associated with an approval and does not prompt you to complete the information for a global status update.

► To approve planned change orders

From the Change Management Setup menu (G5311), choose Planned Change Order Entry.

1. On Work with Planned Change Order, complete the following field and click Find:
 - Job Number
2. Choose a planned change order and click Select.
3. On Planned Change Order Entry, update the PCO Status Code to a code that represents that the PCO is approved, and then click OK.

Change Request Entry - [Global Status Update]

File Edit Preferences Window Help

OK Cancel Dis... Abort Links Displ... OLE... Internet

Job Number 1620 Birmingham Steel - Memphis

CR Number 12 Framing Materials

CR: Updates all status' for each grid row.
PCO/CO: Updates status' for all attached change requests.

UPDATE STATUSES:	From	To
Cost Status	*	A
Revenue Status	*	A
Subcontract Status	*	A
Change Req. Header Status	*	[Status Code] [Dropdown Arrow]

4. On Global Status Update, change the following fields to reflect the status you want to change from and the status you want to change to and click OK:

- Cost Status
- Revenue Status
- Subcontract Status
- Status Code

If you leave the asterisk (*) in the From field for an account type, the system changes all accounts of that type to the detail status code that you specify in the To field.

Approving Change Orders

You can approve COs after all information on them is complete. You approve a CO by changing the status code for the CO to the code specified in the processing options as the code that indicates that the CO is approved.

In general, you change the CO status to approved only if all accounts on the change requests that are attached to the PCOs that are attached to the CO are also approved or are ready to be approved. Before you can approve a CO, all accounts on all attached change requests must have a final monetary amount.

When you approve a change order, the system displays the Global Status Update form. The Global Status Update form lets you specify which account types on

the change requests attached to the PCOs that are attached to the CO you want to update to an approved status.

Note: After you approve a CO, you cannot make any changes to it.

See Also

- *Understanding Global Status Updates* for more information about using the Global Status Update form
- *Entering Account Distribution Information* for information about completing the final amount fields

Before You Begin

- ☐ Set the Approved CO Status processing option so that the system recognizes which code you want to use to indicate that a CO is approved. If you do not set this processing option, the system does not know which code is associated with an approval and does not prompt you to complete the information for a global status update.

To approve change orders

From the Change Management Setup menu (G5311), choose Change Order Entry.

1. On Work with Change Orders, complete the following field and click Find:
 - Job Number
2. Choose a change order and click Select.
3. On Change Order Entry, update the CO Status Code to a code that represents that the CO is approved, and then click OK.

Change Request Entry - [Global Status Update]

File Edit Preferences Window Help

OK Cancel Dismiss Abort Links Display OLE Internet

Job Number Birmingham Steel - Memphis

CR Number Framing Materials

CR: Updates all status' for each grid row.
PCO/CO: Updates status' for all attached change requests.

UPDATE STATUSES:	From	To
Cost Status	<input type="text" value="*"/>	<input type="text" value="A"/>
Revenue Status	<input type="text" value="*"/>	<input type="text" value="A"/>
Subcontract Status	<input type="text" value="*"/>	<input type="text" value="A"/>
Change Req. Header Status	<input type="text" value="*"/>	<input type="text" value="A"/>

4. On Global Status Update, change the following fields to reflect the status you want to change from and the status that you want to change to and click OK:

- Cost Status
- Revenue Status
- Subcontract Status
- Status Code

If you leave the asterisk (*) in the From field for an account type, the system changes all accounts of that type to the detail status code you specify in the To field.



Subcontract Information Commitment

At any time after you assign a contract number to a subcontract account in a detail line on a change request, you can send the subcontract account information to the appropriate contract in the Subcontract Management system. This update process is known as committing the subcontract account. When you commit a subcontract account, you can either update an existing subcontract line or you can create a new subcontract line.

You usually commit a subcontract account after you have moved it through the approval process. You can only send information from the most recent requote.

J.D. Edwards recommends that you commit subcontract information in proof mode before you commit it in final mode. When you commit subcontract information in proof mode, the system generates a report for you to review but does not update any ledgers. After verifying the information and making any necessary changes, you can commit the subcontract in final mode. After you commit in final mode, you cannot make any changes to the subcontract information in the Change Management system.

Committing subcontract information consists of the following tasks:

- ☐ Entering contract information for subcontracts
- ☐ Committing subcontracts to Subcontract Management
- ☐ Maintaining subcontract logs



Entering Contract Information for Subcontracts

Before you can send subcontract information in a detail line on a change request to the appropriate supplier subcontract in the Subcontract Management system, you must enter information about the subcontract. When you enter the subcontract information, the system adds information about the subcontract account to the Subcontract Details/Commit form. You can view information about the subcontract account and can commit the subcontract to the Subcontract Management system from the Subcontract Details/Commit form.

You can set a processing option to have the system automatically complete contract information.

Before You Begin

- ☐ Verify that the contract information that you want to enter for a change request exists in the Purchase Order Header table (F4301).



To enter contract information for subcontracts

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Requests, complete the following field and click Select:
 - Job Number
2. On Change Request Entry, choose the detail line to which you want to add subcontract information.
3. Choose Additional Details from the Row menu.
4. On Cost, Revenue, Subcontract Details, click the Subcontract Details tab.

Change Request Entry - [Cost, Revenue, Subcontract Details]

File Edit Preferences Form Window Help

OK Can... Dis... Abo Links ▼ Contr... OLE ... Internet

Job Number 1620 Birmingham Steel - Memphis

Change Request 3 Foundation Equipment

Cost Details Revenue Details **Subcontract Details**

Status Subcontract G/L Date

Description Subcontract Bill Item Code

Contract Terms Only N

Supplier Subcon Subledger

Account Number Subcontract

	QUANTITY	UM	PT	UNIT PRICE	AMOUNT	DATE
ORIGINAL						
QUOTED						
FINAL						
BEST						

- From the Form menu, choose Subcontract Management, and then Subcontract Search.

Change Request Entry - [Subcontract Detail Search]

File Edit Preferences Window Help

Select Find Close Seg... New... Dis... Abo Links ▼ Displ... OLE ... Internet

Job Number 1620

Line Number	Contract Number	Or Ty	Order Co	Ord Suf	Supplier	Ship To Number	Buyer Number	Description
1.000	6082	OS	00050	000	3480	1620		Subcontract
2.000	6082	OS	00050	001	3480	1620		Subcontract
3.000	6082	OS	00050	002	3480	1620		Framing Labor
1.000	6120	OS	00050	000	3480	1620		Subcontract
1.000	6200	OS	00050	000	3480	1620		Subcontract
1.000	6218	OS	00050	000	3480	1620		Subcontracts

Find records

- On Subcontract Detail Search, click Find.
- Choose the subcontract information that you want to add to the detail line, and then click Select.

The subcontract information appears on the Subcontract Details tab.

8. Complete the following optional field and click OK:

- Subcontract Bill Item Code

The subcontract details appear in the detail line.

Field	Explanation
Job Number	The number of the job, or project, with which the change request is associated. This number must be set up in the Business Unit Master table (F0006).
Subcontract Bill Item Code	A category code associated with the Account Master table (F0901). This is a user defined code (09/01).

Committing Subcontracts to Subcontract Management

You can send the following subcontract information in a detail line on a change request to the appropriate subcontract in the Subcontract Management system:

- Subcontract account information
- Pricing type
- Quantity
- Unit price
- Unit of measure
- Amount (Final)
- Description

Sending subcontract information to the Subcontract Management system is called committing to the Subcontract Management system. You can commit subcontract accounts from the Change Request Entry program or from the Subcontract Details/Commit program.

When you commit subcontract accounts from the Change Request Entry program, you can commit only one account at a time. When you commit subcontract accounts from the Subcontract Details/Commit program, you can commit multiple subcontract accounts if you select multiple lines.

To commit subcontract accounts to the Subcontract Management system, complete one of the following tasks:

- Commit from the Change Request Entry program
- Commit from the Subcontract Details/Commit program

Before You Begin

- ☐ Verify that the contract number and contract type suffix are entered for the contracts to which you want to send information, and that the company and supplier names are entered. See *Entering Contract Information for Subcontracts* for more information about entering subcontract information.
- ☐ Verify that the change request line that you want to commit is open and that the subcontract account includes a final amount.
- ☐ Verify that the Subcontract Commit processing options are set.

► To commit from the Change Request Entry program

From the Change Management Setup menu (G5311), choose Change Request Entry.

1. On Work With Change Request Entry, complete the following field and click Find:
 - Job Number
2. Choose a change request and click Select.
3. On Change Request Entry, choose the detail line that you want to commit, and then choose Additional Details from the Row menu.
4. On Cost, Revenue, Subcontract Details, click the Subcontract Details tab.
5. From the Form menu, choose Subcontract Management, and then choose Subcontract Commit.

► To commit from the Subcontract Details/Commit program

From the Change Management Inquiries menu (G5312), choose Subcontract Details/Commit.

1. On Subcontract Detail/Commit, choose the accounts that you want to commit.

The screenshot shows a software window titled "Subcontract Detail/Commit - [Subcontract Detail/Commit]". The window has a menu bar (File, Edit, Preferences, Row, Window, Help) and a toolbar with icons for Select, Find, Close, Seg..., New..., Sub..., Dis..., and Abo. Below the toolbar is a "Job Number" field with the value "1620" and a search icon. The main area contains a table with the following data:

Job Number	Change Request	Req. No.	Detail Description	Status Code	Contract Number	Contract Type	
1620	2		Labor	A	6120	OS	00C
1620	5		Labor	A	6082	OS	00C
1620	9		Labor	A	6200	OS	00C
1620	16		Regular Time	Z	6082	OS	00C
1620	17		Premium Time	Q	6120	OS	00C
1620	17		Labor	Z	6082	OS	00C
1620	18		Regular Time	Z	6082	OS	00C
1620	19		Premium Time	Z	6218	OS	00C
1620	20		Major Materials	Z	6200	OS	00C
1620	21		Regular Time	A	6120	OS	00C

2. From the Row menu, choose Subcontract Commit.

The system commits the subcontract to the Subcontract Management system. If you commit in final mode, the system changes the detail status code to the code specified in the processing options.

Technical Considerations

Committing in proof and final mode

You can commit a subcontract in either proof or final mode by setting a processing option. After you commit in final mode, you cannot make any changes to the subcontract information in the Change Management system.

To prevent accidentally committing a subcontract in final mode, you can set the processing option in the Change Request Entry program to one mode and set the processing option in the Subcontract Details/Commit program to the other mode. For example, you can set the processing option in the Change Request Entry program to commit subcontracts in proof mode and set the processing option in the Subcontract Details/Commit program to commit in final mode. If you set the programs to different modes and always use one program for committing in proof mode and the other for committing in final mode, you minimize the chance for error.

Committing subcontracts in proof mode from the Change Request Entry form is a good practice because you must make any necessary changes to the subcontract account from the Change Request Entry program. After you make any necessary changes, such as updating the detail status code or updating monetary amounts, you can commit the subcontract information. When you commit the subcontract, the system generates a report that you can review to make sure that all amounts and accounts are correct. You can then re-commit the subcontract and review the new report. When all entries are correct, you can commit in final mode from the Subcontract Detail/Commit program.

Detail status codes for committed subcontracts

In general, you commit subcontract information to the Subcontract Management system when the subcontract accounts are approved and when you do not expect any changes to the accounts. Many organizations create a special detail status code for subcontract accounts that have been committed in final mode so that they can easily determine which subcontract accounts have been committed. You can set the processing option for the status of a submitted subcontract to automatically update the detail status code assigned to a committed account to the special status code.

Printing the Subcontract Amendment Report

The system generates the Subcontract Amendment report when you commit a subcontract account on a detail line on a change request to the Subcontract Management system in either proof or final mode.

You can use the Subcontract Amendment Report from Change Management report as an amendment to a contract. It provides signature lines for approvals.

The Subcontract Amendment Report from Change Management report includes the following:

- Contract number and type
- Change number
- Change request number and amount
- Date subcontract was committed
- Subsidiary account and object account numbers

Processing Options for Subcontract Detail and Commit (P53301)

Processing Tab

Use these processing options to specify the following:

- The subcontract change order number and the G/L account number to which the request will be committed in Subcontract Management
- Whether the system updates Subcontract Management by creating a new line item or by updating an existing line item
- The status code to which the change request will be updated when it is committed
- Whether the program runs in proof or final mode

1. Commitment Processing

Use this processing option to specify whether the system runs the program in proof or final mode. You should first run the program in proof mode so you can view the report before running it in final mode. When you run the program in final mode, the system updates tables and generates a report. Valid values are:

Blank Proof mode.

1 Final mode.

2. Commitment Processing: Subcontract Change Order Number Option

Use this processing option to specify the subcontract change order number that the system assigns to the change request. Valid values are:

Blank Use the number from the existing subcontract change order.

- 1 Use the value that you specify in the Subcontract Change Order Number processing option.

Subcontract Change Order Number

Use this processing option to specify the number of the subcontract change order that the system commits the request to. If you leave this field blank, the next subcontract change order number will be used.

3. Commitment Processing: Subcontract Detail Line Item

Use this processing option to specify how the system updates the Purchase Order Detail table (F4311) when the system commits a change request. Valid values are:

Blank Create a new line item for a subcontract for the Purchase Order Detail table.

- 1 Update an existing line item for a subcontract for the Purchase Order Detail table. The amount committed replaces the current amount for that line item if no payments have been made.

4. Commitment Processing: G/L Account

Use this processing option to specify the G/L account to be used when the system commits a change request. Valid values are:

Blank Use the existing account.

- 1 Use the account specified in the AAI's for Change Management.

5. Commitment Processing: Subcontract Status

Use this processing option to specify the detail status code that the system assigns to the change request when it is committed to Subcontract Management. Verify that this status code has been set up in the Detail Status Code Update program.

5a. Audit Trail

Use this processing option to specify how the system creates audit trail records in the Account Ledger table (F0911). Valid values are:

Blank Create audit trail records per period change. The system determines whether an account ledger record that has the G/L date of the period end exists. If a record exists, the system updates the record with the new information. If a record does not exist, the system creates a record.

- 1 Create multiple audit trail records. The system creates new records without determining if other account ledger records exist.
- 2 Do not create audit trail records.

Log Revisions Tab

Use these processing options to specify the log type to use and the function of the pay effect flag when creating Contract Log Revisions.

1. Commitment Processing: Log Type

Use this processing option to specify the log type that the system assigns when you create Contract Log Revisions. For a list of valid values, click on the visual assist button next to the field.

2. Commitment Processing: Pay Effect

Use this processing option to specify the pay effect flag that the system assigns when you create Contract Log Revisions.

Versions Tab

Use this processing option to specify the version that the system uses when you run the Subcontract/Purchase Order Entry program.

1. Commitment Processing: Subcontract/PO Entry (P4310)

Use this processing option to specify the version that the system uses when it commits a change request. The commitment process uses server XT4311Z1, which uses the version that you choose for Purchase Orders (P4310).

When you choose a version, review the version's processing options to ensure that the version meets your requirements. If you leave this option blank, the systems uses version ZJDE0015.

Maintaining Subcontract Logs

The Change Management system automatically creates a log when you commit a subcontract to the Subcontract Management system in final mode. A log is a record that the system creates so that you can track information that is supplemental to the information in a contract.

The system includes general information in each log, such as log type and log status. A log can also contain either of the following types of information to refer to a document or activity:

- Supplier address book number
- Contract number and contract type from the Subcontract Management system

Logs can also include other information relevant to the contract, such as meeting dates, notes, and so on.

You can create logs manually or modify logs that the system creates. You can include information such as submittals and transmittals. A submittal is information that you need to receive from a subcontractor, such as proof of insurance. A transmittal is information that you need to send to a subcontractor, such as permission to proceed. You can also add descriptive text about the document or activity.

Log revisions are stored in the Subcontract Log table (F4303). Descriptive text is stored in Media Objects.

Maintaining subcontract logs consists of the following task:

- ☐ Modifying a log for a change request

Modifying a Log for a Change Request

The Change Management system automatically creates a log when you commit a subcontract to the Subcontract Management system. You can modify the log to add information that is not tracked by the Subcontract Management system. You can also create logs manually.

► To modify a change request log

From the Change Management Inquiries menu (G5312), choose Log Revisions.

1. On Change Management Log Details, complete the following fields:

- Job Number
- Change Request

Log Type	Description	Log Status	Explanation -Remark-	Required Date	Pay Effect
T	Payment for framing	N	CR: 0000009		N

2. Complete the following optional fields:

- Log Type
- Description
- Log Status
- Explanation -Remark-
- Required Date
- Pay Effect
- Issue Date
- Expired Date
- Contract Number
- Contract Type
- Company
- Address Number

- Category Code 1
 - Category Code 2
 - Category Code 3
3. To enter descriptive text, double-click the gray box to the left of the Log Type field in the detail area (unlabeled).
 4. On Media Objects, choose New, and then Text from the File menu.
 5. Enter descriptive text for the log revision.
 6. From the File menu, choose Save & Exit.
 7. On Change Management Log Details, click OK.

Field	Explanation
Job Number	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Change Request	The number assigned to the change request for a particular job.

Field	Explanation
Contract Type	<p>A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. J.D. Edwards has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>The following document types are defined by J.D. Edwards and should not be changed:</p> <ul style="list-style-type: none"> P Accounts Payable documents R Accounts Receivable documents T Payroll documents I Inventory documents O Purchase Order Processing documents J General Accounting/Joint Interest Billing documents S Sales Order Processing documents OS Subcontract OP Purchase Order R2 Contract Billing
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.
Log Type	A user defined code (00/LG) that specifies the type of information in a log entry. The log type is used to group similar types of entries.
Log Status	<p>A code that specifies whether the requirements for the log line have been satisfied. Valid values are:</p> <ul style="list-style-type: none"> Y Yes, the requirements have been satisfied. N No, the requirements have not been satisfied. Blank The requirements have not been satisfied, the log line is not yet in effect, or no status is required.
Required Date	The date that the log entry needs to be received. For example, consider a submittal requirement for an insurance certificate. The date that a copy of the policy or certified proof of coverage document is to be received would be entered in the Required Date field.

Field	Explanation
Pay Effect	<p>A code that indicates whether the submittal requirement is of such importance that regular payments to the subcontractor can be suspended if the submittal requirement is not properly satisfied. This code is normally used in conjunction with submittal log entries.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> Y Issue warning messages if log requirements are not met. N Do not issue warning messages. <p>If Pay Effect is set to Y, various warning messages can appear during progress payment entry when outstanding log requirements exist.</p>
Issue Date	<p>The date that the log entry was issued. For example, for a submittal requirement for an insurance certificate, the effective date for the insurance policy would be entered in the Issue Date field.</p>
Expired Date	<p>The expiration date of the log entry. For example, in the case of a submittal requirement for an insurance certificate, the termination date for the policy would be entered in the Expired Date field. The termination date would then be used by the Submittal Status Update program to update the status field. If the Expired Date is earlier than the date that you run the program, the system sets the status to N for the log entry.</p>
Contract Number	<p>The contract number used in the Contract Billing system. This number, along with the contract type and contract company, provides the link between the Contract Billing and Change Management systems. It will allow you to copy revenue information for a change request into the Contract Billing system.</p>
Company	<p>A number that, along with order number and order type, uniquely identifies an order document (such as a purchase order, a contract, a sales order, and so on).</p> <p>If you use the Next Numbers by Company/Fiscal Year facility, the Automatic Next Numbers program (X0010) uses the order company to retrieve the correct next number for that company. If two or more order documents have the same order number and order type, the order company lets you locate the desired document.</p> <p>If you use the regular Next Numbers facility, the order company is not used to assign a next number. In this case, you probably would not use the order company to locate the document.</p>
Category Code 1	<p>A user defined category code associated with log information.</p>



Reports

Print change management reports to review information about change requests, planned change orders, and change orders.

Reports consists of the following task:

- ☐ Printing Change Management Reports



Printing Change Management Reports

The Change Management system offers a variety of reports that help you review and manage your change request information.

Use Change Management reports to review information including:

- | | |
|------------------------------|--|
| Change requests | <ul style="list-style-type: none">• Detail and summary information• Contract information• Status of each account on a detail line• Account numbers and amounts for each account |
| Planned change orders | <ul style="list-style-type: none">• Detail and summary information |
| Change orders | <ul style="list-style-type: none">• Detail and summary information |
| Subcontracts | <ul style="list-style-type: none">• Log information |

You can also generate integrity reports to the Change Request Details table (F5311), the Planned Change Order Master table (F5314), and the Change Order Master (F5315) table. Integrity reports contain information about discrepancies caused by using more than one currency for a job.

Printing Change Management reports consists of:

- ☐ Printing the Change Request Summary report
- ☐ Printing the Change Request Details by Account report
- ☐ Printing the Change Request Details with Contracts report
- ☐ Printing the Job Planned Change Orders report
- ☐ Printing the Job PCO Summary report
- ☐ Printing the Job PCO Detail report
- ☐ Printing the Job Change Orders report
- ☐ Printing the Job CO Summary report

- ☐ Printing the Job CO Detail report
- ☐ Printing the CO/PCO (F5315/F5314) Integrity report
- ☐ Printing the PCO/CR (F5314/F5311) Integrity report
- ☐ Printing the Log Report/Update report

Printing the Change Request Summary Report

From the Change Management Reports menu (G5313), choose Change Request Summary.

You can choose one job or multiple jobs for the Change Request Summary report. In addition, you can choose the change requests that you want to appear in the report. You can set processing options to specify how the system determines totals for cost, revenue, and subcontract accounts.

For each change request, the Change Request Summary report includes the following:

- Change request and requote number
- Description
- Required, extended, original, and approved dates
- Totals for cost, revenue, and subcontract accounts
- PCO and CO number and status

See Also

- *R534011, Change Request Summary* in the *Reports Guide* for a report sample

Processing Options for Change Request Summary (R534011)

Defaults Tab

Use these processing options to specify which amounts (original, quoted, final, or best) the system uses to calculate totals for cost, revenue, and subcontract accounts.

1. Cost Total

Use this processing option to specify how the system calculates the cost total. Valid values are:

Blank Best amounts
1 Original amounts
2 Quoted amounts
3 Final amounts

2. Revenue Total

Use this processing option to specify how the system calculates the revenue total. Valid values are:

Blank Best amounts
1 Original amounts
2 Quoted amounts
3 Final amounts

3. Subcontract Total

Use this processing option to specify how the system calculates the subcontract total. Valid values are:

Blank Best amounts
1 Original amounts
2 Quoted amounts
3 Final amounts

Printing the Change Request Details by Account Report

From the Change Management Reports menu (G5313), choose Change Request Details.

The Change Request Details by Account report includes detail line information for the change requests or requotes that you choose. For each change request or requote, the report includes the following:

- Change request number
- Description of each line
- Account numbers
- Original, quoted, and final amounts for each account on a detail line
- Status of each account on a detail line

- Total of best amounts for cost, revenue, and subcontract accounts
- PCO and CO information, such as:
 - Number
 - Status
 - Submitted and approved dates

See Also

- *R53411, Change Request Details* in the *Reports Guide* for a report sample

Printing the Change Request Details with Contracts Report

From the Change Management Reports menu (G5313), choose Change Request Details with Contracts.

The Change Request Details with Contracts report lists detail line information for the change requests or requotes that you choose. For each change request or requote, the report lists the following:

- Change request number
- Description of each line
- Account numbers and the original, quoted, final, and best amounts for each revenue and subcontract account on a detail line
- Status of each revenue and subcontract account on a detail line
- Contract information for each revenue and subcontract account, including:
 - Contract number and type
 - Owner
 - Supplier
 - Pay item
 - Commitment date
- PCO and CO information, such as:
 - Number
 - Status
 - Submitted and approved dates

See Also

- *R534021, Change Request Details with Contracts* in the *Reports Guide* for a report sample

Printing the Job Planned Change Orders Report

From the Change Management Reports menu (G5313), choose Job Planned Change Orders.

The Job Planned Change Orders report includes information about totals on the PCOs for a job. The report includes the following:

- Job number and description
- Information about the PCO, including:
 - PCO number and description
 - Status
 - Submitted and approved dates
 - Quoted and approved totals for the cost, revenue, and subcontract accounts

See Also

- *R53440, Job Planned Change Orders* in the *Reports Guide* for a report sample

Printing the Job PCO Summary Report

From the Change Management Reports menu (G5313), choose Job PCO Summary.

The Job PCO Summary report includes information about totals on the PCOs for a job. The report includes the following:

- Job number and description
- Change order number and description
- Information about the PCO including:
 - PCO number and description
 - Status
 - Submitted and approved dates
 - Authorized amounts for cost, revenue, and subcontract accounts
 - Total best amounts for cost, revenue, and subcontract accounts

- Information about the attached change requests, including:
 - Number and description
 - Original, quoted, and final amounts for cost, revenue, and subcontract accounts
 - Total of the best amounts for cost, revenue, and subcontract accounts

See Also

- *R53404, Job PCO Summary* in the *Reports Guide* for a report sample

Printing the Job PCO Detail Report

From the Change Management Reports menu (G5313), choose Job PCO Detail.

The Job PCO Detail report contains the following information about PCOs:

- Job number and description
- Information about the PCO, including:
 - PCO number and description
 - Status
 - Submitted and approved dates
- Information about the change requests attached to the PCO, including:
 - Original, quoted, and final amounts for the cost, revenue, and subcontract accounts
 - Amount totals for the accounts on the change requests

See Also

- *R534041, Job PCO Detail* in the *Reports Guide* for a report sample

Printing the Job Change Orders Report

From the Change Management Reports menu (G5313), choose Job Change Orders.

The Job Change Orders report includes the following information about the change orders for a job:

- Change order number and description
- Status

- Submitted and approved dates
- The quoted and approved totals for the cost, revenue, and subcontract accounts for each CO

See Also

- *R53450, Job Change Orders* in the *Reports Guide* for a report sample

Printing the Job CO Summary Report

From the Change Management Reports menu (G5313), choose Job CO Summary.

The Job CO Summary report includes information about the PCOs that are attached to the CO and the change requests that are attached to the PCOs. This report includes the following:

- The CO authorized amount total for cost, revenue, and subcontract accounts
- The PCO approved, quoted, and final totals for cost, revenue, and subcontract accounts
- The best amount totals for the CO and for the job

See Also

- *R53405, Job CO Summary* in the *Reports Guide* for a report sample

Printing the Job CO Detail Report

From the Change Management Reports menu (G5313), choose Job CO Detail.

The Job CO Detail report includes the following information about change requests:

- Job number and description
- Information about the CO including:
 - CO number and description
 - Status
 - Submitted and approved dates
 - Total of authorized amounts for cost, revenue, and subcontract accounts

- Information about the planned change orders attached to the CO, including:
 - PCO number and description
 - PCO approved amounts for cost, revenue, and subcontract accounts
- Information about the change requests attached to the PCO, including:
 - Change request number and description
 - Quoted and final amounts for the cost, revenue, and subcontract accounts

See Also

- *R534051, Job CO Detail* in the *Reports Guide* for a report sample

Printing the CO/PCO (F5315/F5314) Integrity Report

From the Change Management Reports menu (G5313), choose CO/PCO (F5315/F5314) Integrity.

The CO/PCO (F5315/F5314) Integrity report compares final and quoted amounts for cost, revenue, and subcontract records in the Change Order Master table (F5315) to the attached planned change orders in the Planned Change Order Master table (F5314) and prints the differences on a report.

This report includes information about discrepancies that occur when more than one currency is used.

Printing the PCO/CR (F5314/F5311) Integrity Report

From the Change Management Reports menu (G5313), choose PCO/CR (F5314/F5311) Integrity.

The PCO/CR (F5314/F5311) Integrity report compares final and quoted amounts for cost, revenue, and subcontract records in the Planned Change Order Master table (F5314) to the attached change requests in the Change Request Detail table (F5311) and prints the differences on a report.

This report includes information about discrepancies that occur when more than one currency is used.

Printing the Log Report/Update Report

From the Change Management Reports menu (G5313), choose Log Report/Update.

The Log Report/Update report consists of each log entry and any extended comments for the specified job. Extended comments include comments about documents you need to receive from a subcontractor, or documents or information you need to give to a subcontractor.

Each log includes:

- Log type
- Description
- Explanation
- Issue, expiration, and required dates

See Also

- *R43300, Log Report/Update* in the *Reports Guide* for a report sample

Setup



System Setup

Before you use the Change Management system, you need to define certain information specific to your business that the system uses during change request processing.

System setup consists of the following tasks:

- ☐ Setting up user defined codes for Change Management
- ☐ Setting up change request detail status codes
- ☐ Setting up job-specific user defined codes

The following table describes the setup tasks that are required before you can use the Change Management system:

User defined codes	Define customized codes that are appropriate for your business needs. For example, you can define codes that identify the priority of a change request, the type of change request, and planned change order and change order statuses.
Change request detail status codes	Define approval stages for accounts on a change request. You can associate account ledgers with detail status codes so that the system updates ledgers when you update the detail status code for an account on a change request.
Job-specific user defined codes	Define codes that are specific to a job. For example, if you have several phases of a job, you can define a code for each phase of a job. You can then use the codes in each change request so that you know to which phase of the job the change request belongs.
Ledger type master	Define monetary decimals at the ledger type level. You can set up ledger types at the job or company level. <i>See Setting Up Ledger Type Rules in the <i>General Accounting Guide</i>.</i>



Automatic accounting instructions

Define the AAls (CMxx) the system uses when you commit a subcontract account in a change request detail line to the Subcontract Management system.

See *Working with AAls* in the *General Accounting Guide*.

Column versions

View the saved column versions that you can use when you access the Change Request Entry program.

The programs listed above are located on the Change Management System Setup menu (G5341).

Setting Up User Defined Codes for Change Management

You can use the following user defined codes as part of the identifying information of a change request. They are informational only.

Change request header status Use this code on the Change Request Entry form to indicate the overall status of the change request. This code has no effect on the ledger types and should not be confused with the detail status codes defined in the Change Request Detail Status Update table (F53101).

Change request priority Use these codes to track the urgency of a change request.

Change request type Use these codes to help define the change request. For example, you might create codes that identify how change requests are priced.

Category codes Use these codes (1–5) to generate selective reporting based on user assigned values. For example, you might create a code that identifies whether a change was initiated by the owner or by your company.

Planned change order status Use this code to indicate the status of a planned change order (PCO). If you enter a PCO status code in the PCO Approved Status processing option, the system opens the Global Status Update program when you approve a PCO. The Global Status Update program lets you update the status codes for the accounts on the change requests attached to a PCO.

See *Approving Planned Change Orders* for more information about using this code.

Change order status

Use this code to indicate the status of a change order (CO). If you enter a CO status code in the CO Approved Status processing option, the system opens the Global Status Update program when you approve a CO. The Global Status Update program lets you update the status codes for the accounts on the change requests attached to the PCOs attached to a CO.

See *Approving Change Orders* for more information about using this code.

Job-specific UDCs

Use these codes for UDCs that are specific to the Change Management system.

See *Setting Up Job-Specific User Defined Codes*.

From the Change Management System Setup menu (G5341), choose User Defined Codes. Alternatively, enter UDC in the fast path.

See Also

- *User Defined Codes* in the *OneWorld Foundation Guide* for information about setting up and maintaining user defined codes

Setting Up Change Request Detail Status Codes

You must set up detail status codes in the Change Request Detail Status Code Update program before you can enter account distribution information for change requests.

For each detail status code, define the following:

- The type of account (cost, revenue, or subcontract) with which the code can be used
- The amount ledger type to be updated in the Account Balances table (F0902) and the Account Ledger table (F0911)

Note: This program does not update the AA/AU, HA/HU, PA/PU, or F% ledgers.

- The amount type (original, quoted, final, or best) that will be displayed and updated in the Change Request Detail Status Update table (F53101)

Note: Detail status codes are updated in the Change Request Detail Status Update table (F53101). They are not related to the status code field in the header on the Change Request Entry form. The status code in the header is for information only.

See Also

- *Update Detail Status Codes* for more information about how the system uses detail status codes



To set up change request detail status codes

From the Change Management System Setup menu (G5341), choose Detail Status Code Update.

1. On Work With Status Codes, click Add.
2. On Change Request Status Code Revisions, complete the following fields and click OK:
 - Status
 - Record Type
 - Description

- Amount Ledger Type
- Amount/Qty Type

Field	Explanation
Status	A code defined by the user that specifies the status of an account in a change request detail line. This code is used in the approval process of the change request to determine if the system updates a ledger in the Account Balances table (F0902), to define which ledger type is updated, and to define which amount type the system uses to update the ledger.
Record Type	<p>The record type associated with change request detail information. Each change request can attach to multiple change items. Valid codes are:</p> <ul style="list-style-type: none"> B Budget, or Cost O Owner, or Revenue S Subcontract, or Buyout <p>If you leave this field blank, the system supplies the default value of B.</p>
Description	A user defined name or remark.

Field	Explanation								
Amount Ledger Type	<p>A user defined code (09/LT) that identifies the ledger to which you are posting amounts, such as BA (Budget Ledger) or FE (Field Estimate). You can set up multiple, concurrent ledgers within the general ledger to establish an audit trail.</p> <p>Note: You cannot make journal entries directly to a ledger if the second letter of the ledger type is U (units).</p>								
Amount/Qty Type	<p>A code that specifies which amounts and quantities in the Change Request Details table (F5311) will be used for processing. Valid values are:</p> <table> <tr> <td>O</td><td>Original</td></tr> <tr> <td>Q</td><td>Quoted</td></tr> <tr> <td>F</td><td>Final</td></tr> <tr> <td>B</td><td>Best</td></tr> </table>	O	Original	Q	Quoted	F	Final	B	Best
O	Original								
Q	Quoted								
F	Final								
B	Best								

Technical Considerations

Deleting detail status codes

You cannot delete a status code if it has been used in Change Request Entry. You can only change the description of a status code if it has been used in Change Request Entry.

Setting Up Job-Specific User Defined Codes

You can define up to five user defined codes for each job in your system. These user defined codes are located on the Category Codes tab of the Change Request Entry form and are informational only.

Job-specific user defined codes are stored in the Job Specific UDC's Master table (F53005), not in the User Defined Codes table (F0005).

► **To set up job-specific user defined codes**

From the Change Management User Defined Codes menu (G5342), choose Job Specific UDC's.

1. On Work With Job Specific UDC's, complete the following fields and click Add:
 - Job Number
 - Code Field

2. On Job Specific UDC's Detail, complete the following fields:
 - User Def Code
 - Description
3. Complete the following optional field for each code and click OK:
 - Description 2
 - Special Handling
 - Hard Coded

Field	Explanation
Job Number	The number of the job, or project, with which the change request is associated. This number must be set up in the Business Unit Master table (F0006).
Code Field	<p>For World, the RPG data name. This data field has been set up as a 10-byte field for future use. Currently, it is restricted to 4 bytes so that, when preceded by a 2-byte table prefix, the RPG data name will not exceed 6 bytes.</p> <p>Within the Data Dictionary, all data items are referenced by this 4-byte data name. As they are used in database tables, a 2-character prefix is added to create unique data names in each table specification (DDS). If you are adding an error message, this field must be left blank. The system assigns the error message number using next numbers. The name appears on a successful add. You should assign error message numbers greater than 5000. Special characters are not allowed as part of the data item name, with the exception of #, @, \$.</p> <p>You can create protected data names by using \$xxx and @xxx, where you define xxx.</p> <p>For OneWorld, a code that identifies and defines a unit of information. It is an 8-character, alphabetical code that does not allow blanks or special characters such as: % & , . +.</p> <p>Create new data items using system codes 55-59.</p> <p>The alias cannot be changed.</p>
User Def Code	A list of valid codes for a specific user defined code list.
Description	A user defined name or remark.

Field	Explanation
Special Handling	<p>A code that indicates special processing requirements for certain user defined code values. The value that you enter in this field is unique for each user defined code type.</p> <p>The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify whether the language is double-byte or does not have uppercase characters. Programming is required to activate this field.</p>
Hard Coded	<p>A code that indicates whether a user defined code is hard-coded.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> Y The user defined code is hard-coded N The user defined code is not hard-coded <p>For OneWorld, a check indicates that the user defined code is hard-coded.</p>

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