IMPLEMENTING Oracle JDE ERP

Project Case Studies & White Papers

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Thank the Divine in making my dreams come true.

Thanks to my parents.

"THE WHOLE LIFE IS A SUCCESSION OF DREAMS; MY AMBITION IS TO BE A CONSCIOUS DREAMER, THATS ALL."

— **Swami Vivekananda**

Key words: Oracle, JDE, JD Edwards, EnterpriseOne, ERP Orchestrator

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Disclaimers

This book is about used cases on Oracle's JD Edwards Enterprise One ERP software tools, known as JDE.

Oracle owns JDE software & copyrights.

No customer data is exposed since the book uses demo cycle making sample data. Any client references have been removed. The JDE versions goes back to twenty years back and the screen shots will show the differences. Release version mentioned wherever possible.

Clients need to take care of the licensing and other training needs.

"We are visitors on this planet. We are here for one hundred years at the very most. During that period we must try to do something good, something useful, with our lives. if you contribute to other people's happiness, you will find the true meaning of life."

— **Dalai Lama XIV**

Foreword

You want to know more about Oracle's JDE (JD Edwards Enterprise One) ERP (Enterprise Resource Planning) software. Every new or upgrade E1 (Enterprise One) project want to implement the total functionality of the software. But, project delays and budget limitations place features like UDOs, automation, etc. into future phases and never gets done. In the meantime, end users are still working on stale reports and out of date data analytics.

You are a super user or have interest in knowing cross functional business scenarios. If you go to IT team, they lay out some templates but that needs constant changes. Some business users show interest in learning UDOs, but there is always constant chatter of material shortages in production and/or following up on open orders, vendor performance, data issues, management reporting, etc. You don't have time to creatively think of software solutions. This book will help you to figure out a solution to make use of the ERP

investment much more and make end users happy & productive!

The book includes chapters on JDE discovery initiatives, process flow charts, FAQs, past project case studies for the better understanding of the JDE implementations.

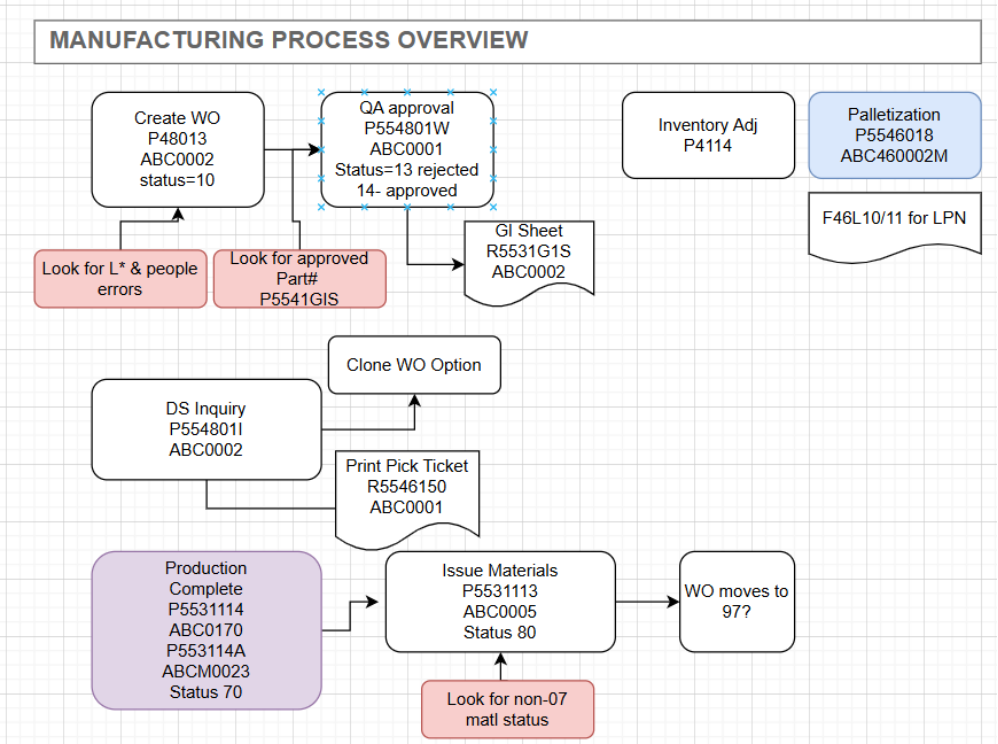
The primary focus is on distribution and manufacturing applications. The concept can be extended to Financial applications

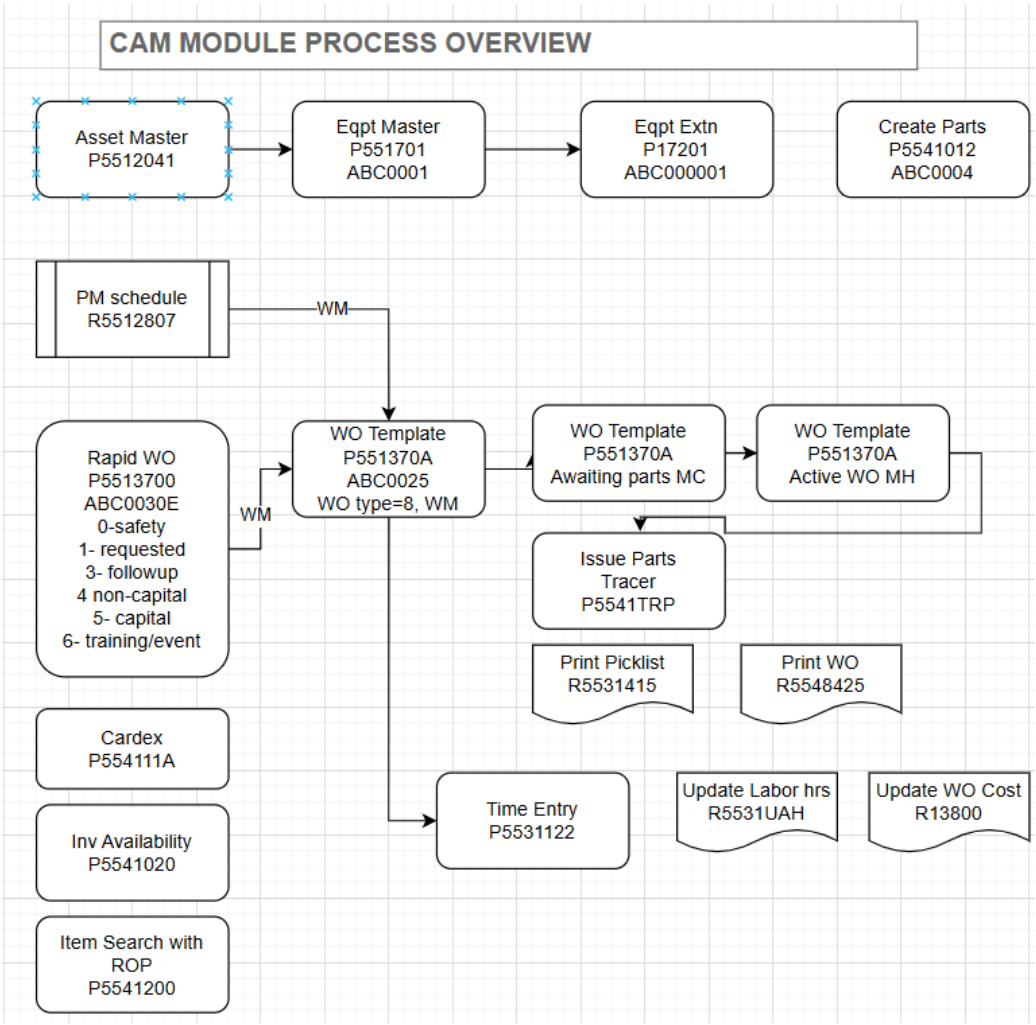
'Nothing great in the world has ever been accomplished without passion' - Georg Hegel

JDE Roll-out - Published March 2026

Functional Area	Manufacturing & CAM
Industry	Food Processing
Scope	Roll-out JDE to SAP site
Description	Implement 9.2 basic functionality in the manufacturing site
Modules	PDM, Planning, Costing, Work Orders, Inventory including cycle count, CAM
Complexity	Work order material issues pick item/lot/quantity from a specified location. Planner need to ensure materials are moved to that location before the release of the work order

Plus Points	Corporate and HQ staff willing to execute functional training and hand-holding. Knowledge transfer on multiple workshops, led by corporate sponsor team lead.


MANUFACTURING PROCESS OVERVIEW
Create WO
P48013
ABC0002
status=10
QA approval
P554801W
ABC0001
Status=13 rejected
14- approved
Inventory Adj
P4114
Palletization
P5546018
ABC460002M
F46L10/11 for LPN
GI Sheet
R5531G1S
ABC0002
Look for L* & people errors
Look for approved Part#
P5541GIS
Clone WO Option
DS Inquiry
P554801I
ABC0002
Print Pick Ticket
R5546150
ABC0001
Production Complete
P5531114
ABC0170
P553114A
ABCM0023
Status 70
Issue Materials
P5531113
ABC0005
Status 80
WO moves to 97?
Look for non-07 matl status


CAM MODULE PROCESS OVERVIEW
Asset Master
P5512041
Eqpt Master
P551701
ABC0001
Eqpt Extn
P17201
ABC000001
Create Parts
P5541012
ABC0004
PM schedule
R5512807
WM
Rapid WO
P5513700
ABC0030E
0-safety
1- requested
3- followup
4 non-capital
5- capital
6- training/event
WM
WO Template
P551370A
ABC0025
WO type=8, WM
WO Template
P551370A
Awaiting parts MC
WO Template
P551370A
Active WO MH
Issue Parts
Tracer
P5541TRP
Print Picklist
R5531415
Print WO
R5548425
Cardex
P554111A
Inv Availability
P5541020
Item Search with
ROP
P5541200
Time Entry
P5531122
Update Labor hrs
R5531UAH
Update WO Cost
R13800

FAQs ON JDE E1 NAVIGATION AND USAGE

	Area	Question	Answer
1	Log-in	What is the password requirements? How many times I can try before	Active directory is enabled for JDE production access.
2	Log-in	Can I reset the password myself?	When you change network password, JDE password also gets syncd in
3	Log-in	How do I know whether I am in PY or PD?	Each environment has different color borders. Under you name on top right you will see the current environment listed. It is advised to use either PY or PD, to avoid confustion and entering data in wrong
4	Log-in	JDE system gets logged off after 60 minutes, can I change that setting?	This is company wide IT policy. And this is different from your computer lock screen time out.
5	Log-in	Should I log-off everytime or use brower x button?	Browser X close does record reservation and may not clear your browser cache. Log-off is advised, which will also give soft warning that you have open JDE windows.
6	Navigation	How many applications I can open at any time?	10. You need to close unused one before opening new menu application/reports. This is for better system
7	Navigation	Can I open new application in another window?	Under user-profile on top right, click 'preferences' choice. Select open application in new window option.
8	Navigation	Can I open same application/version multiple times in my screen?	Yes it is possible, not advised. You may edit data in open window and click okay in another open window of the same application. The data will not be saved
9	Navigation	What are form exit and row exit?	Related applications are mostly under form exit. Child applications under the parent are grouped under row exit. Under the drop-down on username, select 'preferences' and select enable hover forms. When you hover around the application it will show the
10	Navigation	Can I change or remove form exit and row exit options	Requires code change. Not a best practice, to avoid unncessary customizations that impact future software

11	Navigation	I find moving my mouse cursor to all way up to find row exit tedious. What are the options?	You can right click on the row to select row exit choices, requires better mouse control. Or go to drop down under your user name on top right, select 'preferences' and select enable simplified row/form exits. Your row exits will show as side panel. slect the option of 'enable
12	Navigation	Can I favorite my own row exit choices?	Right click on the row and you can save the row exit options into your favorites. This helps in better productivity, if you are using one or two choices among many all the time. You need to use the mouse to drag
13	Navigation	I am updating master data. Can I leave the application open for a long time?	Many editable applications lock your name and show others that you are using that application/form. If you log-off without saving your data, you may lose the data you
14	Terminology	What is QBE?	Query By Example: Any data on the white line above the detail grid. Example: status, dates, description filter, etc. you can use >,<, !(not equal to),DESC*, *DESC* features. Remember many fields are case sensitive
15	Terminology	What are UBEs?	Universal Batch Engine. Commonly known as report jobs. There are UBEs that update many fields across tables or many of them are just static reports
16	Terminology	What are custom grids?	You can realign the columns in an application and save it as default under your named title. It will shown up again next time you log-in. You can create multiple grid names. You will see JDE default view under the drop down. If your SME created/deployed group view you will
17	Terminology	What are custom queries?	If you are often querying data based on line status, date range,etc you can build your own queries and save it. This will save time to repeat the steps at every log-ins. You can flip back to standard query under the drop-
18	Terminology	What is case senstitive means?	You would have noticed fields like item descriptions, customer name, etc in all CAPITALS. This means in queries LEN* may bring LENNAR, but not len*
19	Terminology	What are popular data filters in UBEs	You can use >(greater than), <(less than), !(not equal to), * before or after a abbreviated desc field. There are **no range options** (example: from 1/1/25 to 12/31/25)
20	Terminology	What are UDOs	UDO-user defined objects. Watch lists, CAFE1 screen you see are examples

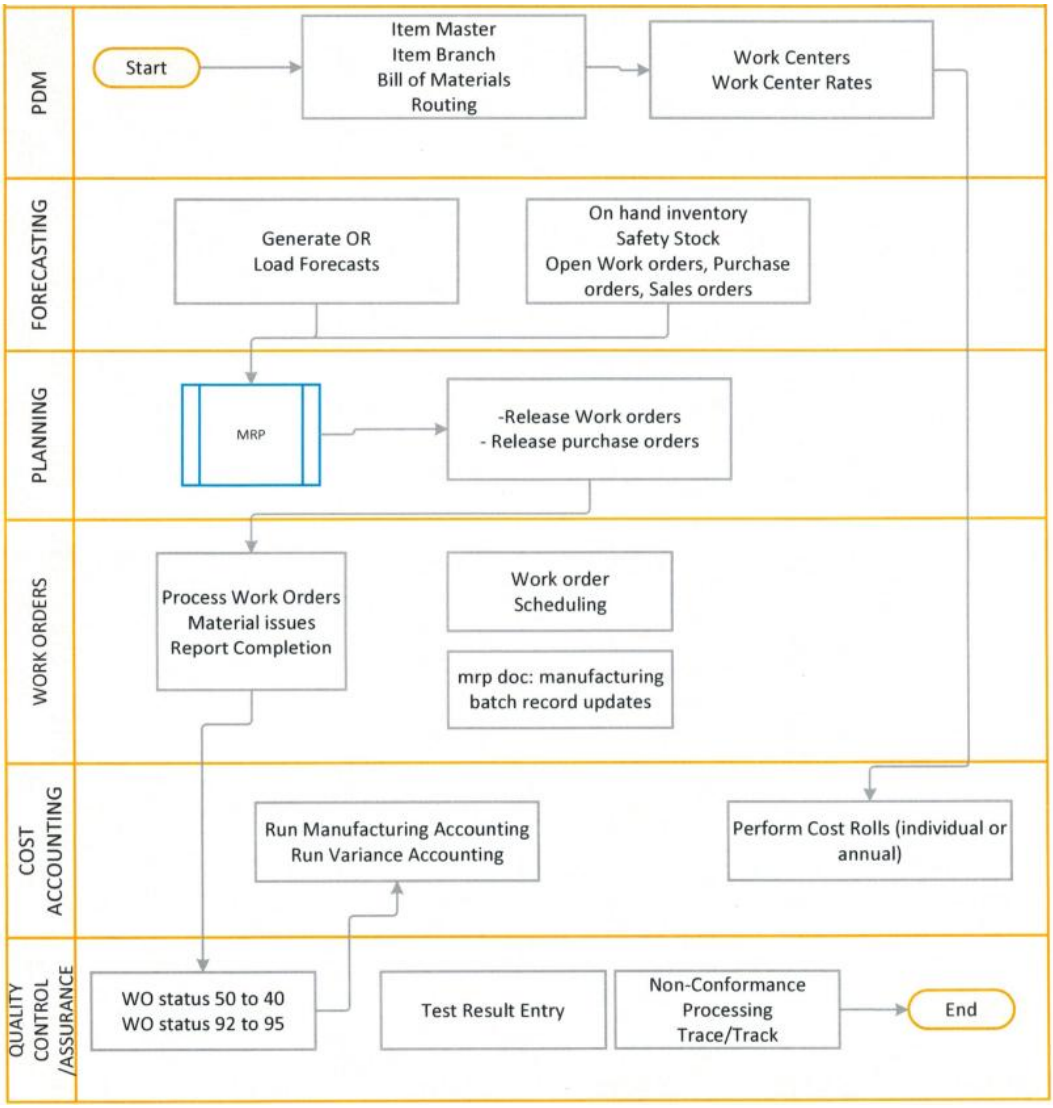
21	Submitted Reports	Why is my submitted job not showing up?	Probably you clicked cancel at the last step instead of OK button. Or your QBE query on submitted jobs has
22	Submitted Reports	Should I delete my submitted jobs everyday?	No need for that activity. IT will purge submitted job per company policy
23	Submitted Reports	How do I know what data was submitted?	Right click the row in submitted jobs, look for audit data on the data selection tab and execution details
24	Submitted Reports	How do I know the job is completed?	Color code on your left panel changes from blue to green. Or in the submitted job status column it becomes from processing to complete status. Clicking the refresh button often DOES NOT speed up the processing
25	Favorites	How do I add my own favorites?	On your open application go to row exit to select favorites. Or hover around your menu and right click add to favorites. Select ok again to the re-naming options
26	Favorites	Can I create my own sub-folders?	Yes, you can drag and drop your favorities to sub-folders. Favorities are attached to your user-id. If you log-in from another computer you will still see them
27	Favorites	Should I keep standard JDE names or modify the name my own way?	Keeping the same JDE name helps in troubleshooting. It is possible that you completely renamed your favorites and JDE menus got realigned at a later date. Then you may have to rebuild your favorites
28	Custom Grids	As SME, can I create one common grid for my team?	Yes, follow naming conventions. Ask IT to deploy to users under certain security roles.
29	Custom Grids	Can end-user can have their custom grids	Yes, you can have your own grids. If you export data and send it to another person, they may not see the same
30	Custom Grids	What two features people miss?	You can right click on QBE line and freeze the column, which makes browsing to the right easy. (Like excel grid lock). You can hide certain columns and save the grid to

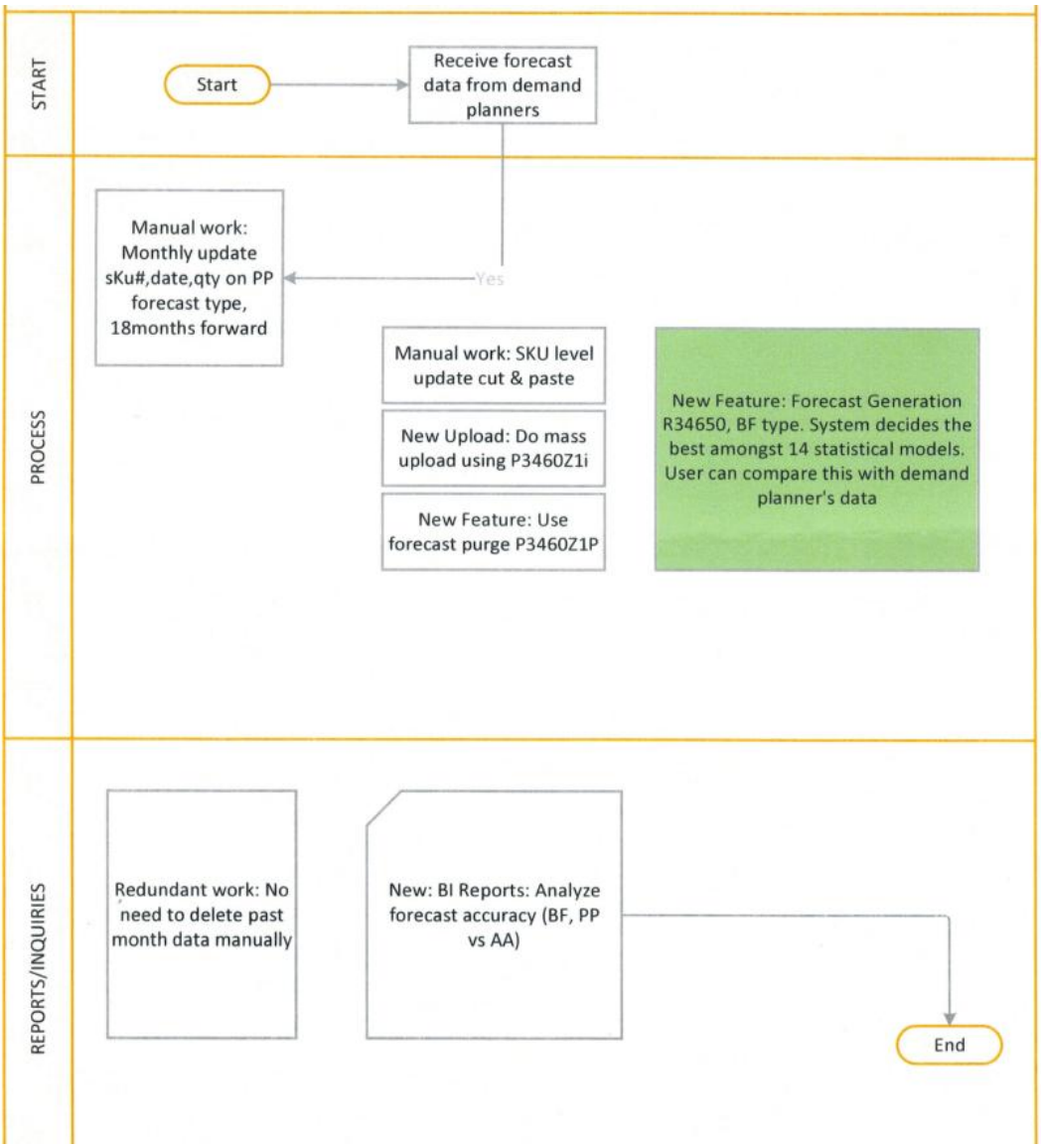
31	Custom Grids	I do want some other data in the custom grid but I know it is available	Custom Grid extension customization. Ask IT for assitance
32	Applications	Why my data is not coming up in applications?	Processing option is pre-configured to show certain type of data. Or you would have entered some data in QBE line previously (like status or date filter) and that
33	Applications	Can I sort data on my own way in custom grids?	On building custom grid, you can color code your fields and also do custom sort. Be familiar with the data first to avoid data conflicts. Example: you choose reverse date logic and end up in multiple rows in the view that necessiates going to the end of the row frequently. And go easy on grid customization colors, JDE has those
34	Applications	On a large data volume, can I go 'end of the row' often?	Grid shows only 10 records. It will take time to bring thousands of rows if you click 'end of the row' option. This slows down the system performance for others.
35	Applications	Why my form fields are pre-populated and grayed out?	Your version in the menu has processing option conditions to present only certain type of data. There could be another version of the same application in the menu structure to select different data set
36	Applications	Why I don't see my data that was there previously?	You didn't clear the pre-populated data in QBE field. That field may not on the far right and missing visibility in
37	Applications	I know I need another version of the application. Can I flip it myself?	Menus are locked with version. Check with your functional SME. If you want to see a record in two different applications together in a single view, CAFE1
38	Applications	Can I export and import grid data	Yes. Ensure you selected 'end of the row' to get all data. Try small data first, if there are any CAB file requirements on your computer. IT will help to resolve it
39	Applications	What are critical conditions to import data?	Not every application allows it. Examples like Z-file processing, you can only import 1000 records at a time. Ensure your JDE grid and importing custom grids are having same field's data. JDE will throw errors before
40	Applications	Ok or green check mark icon.	If you edit data, you need to press green checkmark button to save the data. In some applications, you need to presss green checkmark to move to the next screen. In certain row exit applications, you need to press green check mark to save the data and then use close button

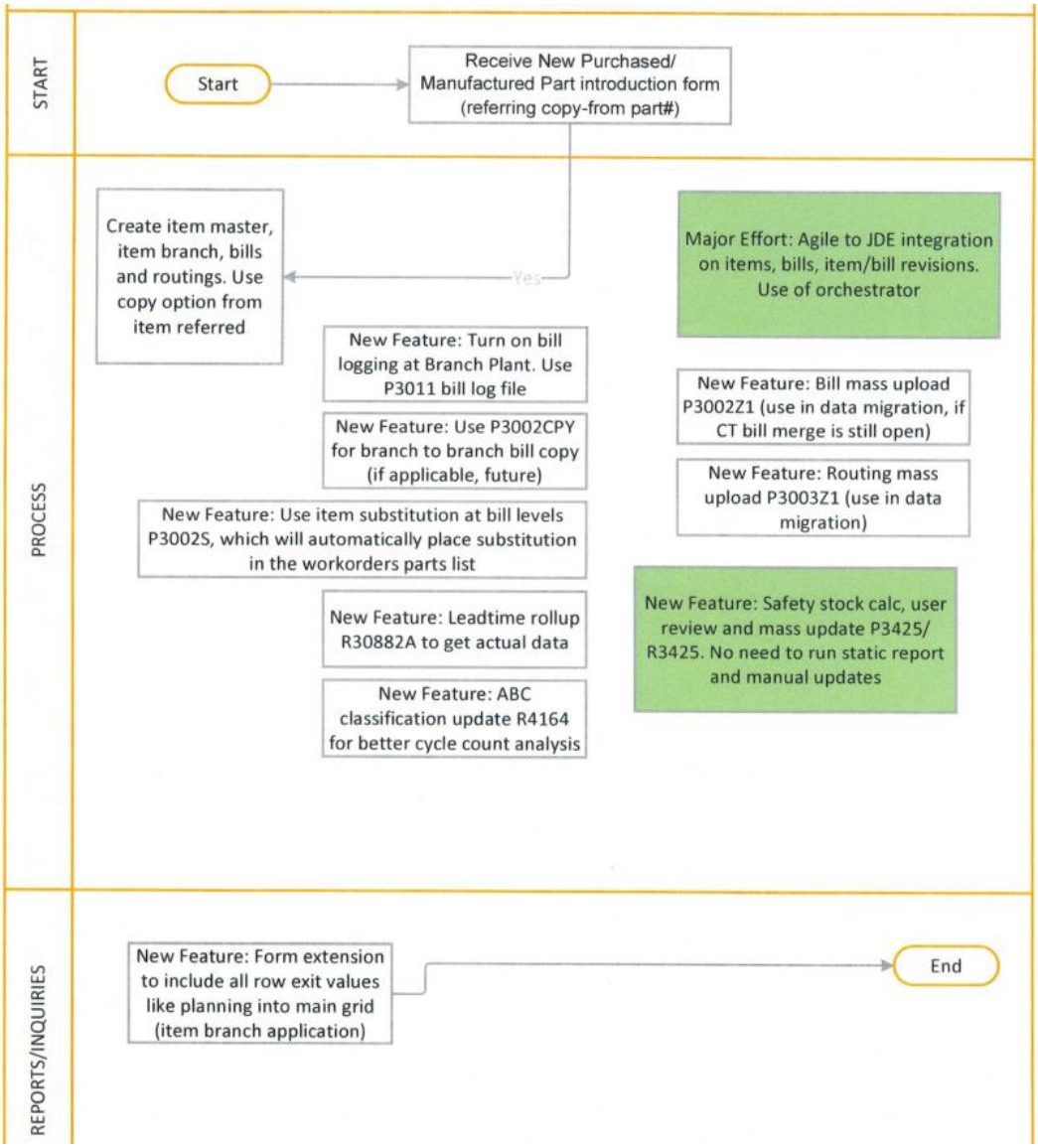
41	Reports	Should I get both processing option and data selection everytime I	Yes and No. It depends on the functionality. Check with SME if you are not sure.
42	Reports	I didn't get processing option expected on my report	It could be incorrect menu setup during initial period of implementation. After system stabilization period, it could be that you pressed cancel inadvertantly
43	Reports	I didn't get data selection option expected on my report	Do not proceed with the final OK button. Start back again. If the data slection is hidden by mistake in the
44	Reports	Can I make changes to processing options?	Yes, based on the business need. Remember, the changes gets struck to that version. That means others using right away will get those changes as well
45	Reports	Can I make changes to data selections during the submission?	Yes, you can. It is application to only that execution and to yours. Do not delete the data selection lines and they are in place for a reason. If you end up opening up closed orders in error (by mistakenly deleting data selection lines), there is not quick undue options. Your
46	Reports	Can I view output in excel or CSV form?	You may select the csv option before you submit the final OK button. If you need to do this everytime, ask IT for default CSV output for that UBE.
47	Reports	Can I terminate my submitted job?	It depends. You should not terminate UBEs that update fields. Check with your SMEs. If you find your jobs taking a lot time, SME or IT can figure out whether someone's job is holding up your queue. They can bypass that
48	Reports	I need to modify lot of data slection lines everytime I execute this UBE multiples times in a day. I also need to add more specific conditions	Reach out to your SME whether a new version of the UBE will help you. This require some IT effort in creating, deploying and adding to the custom menus.

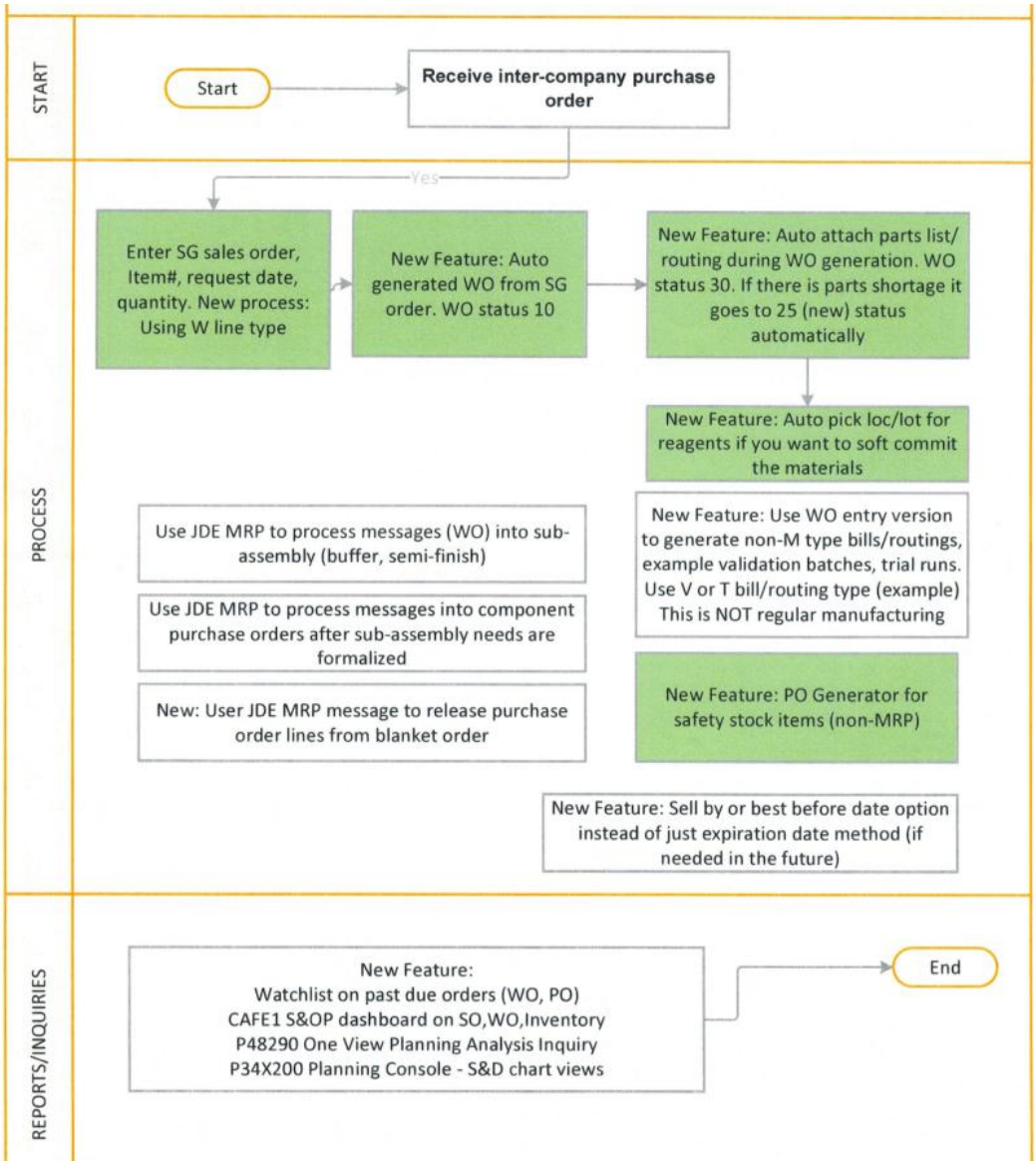
JDE Discovery - Published March 2026

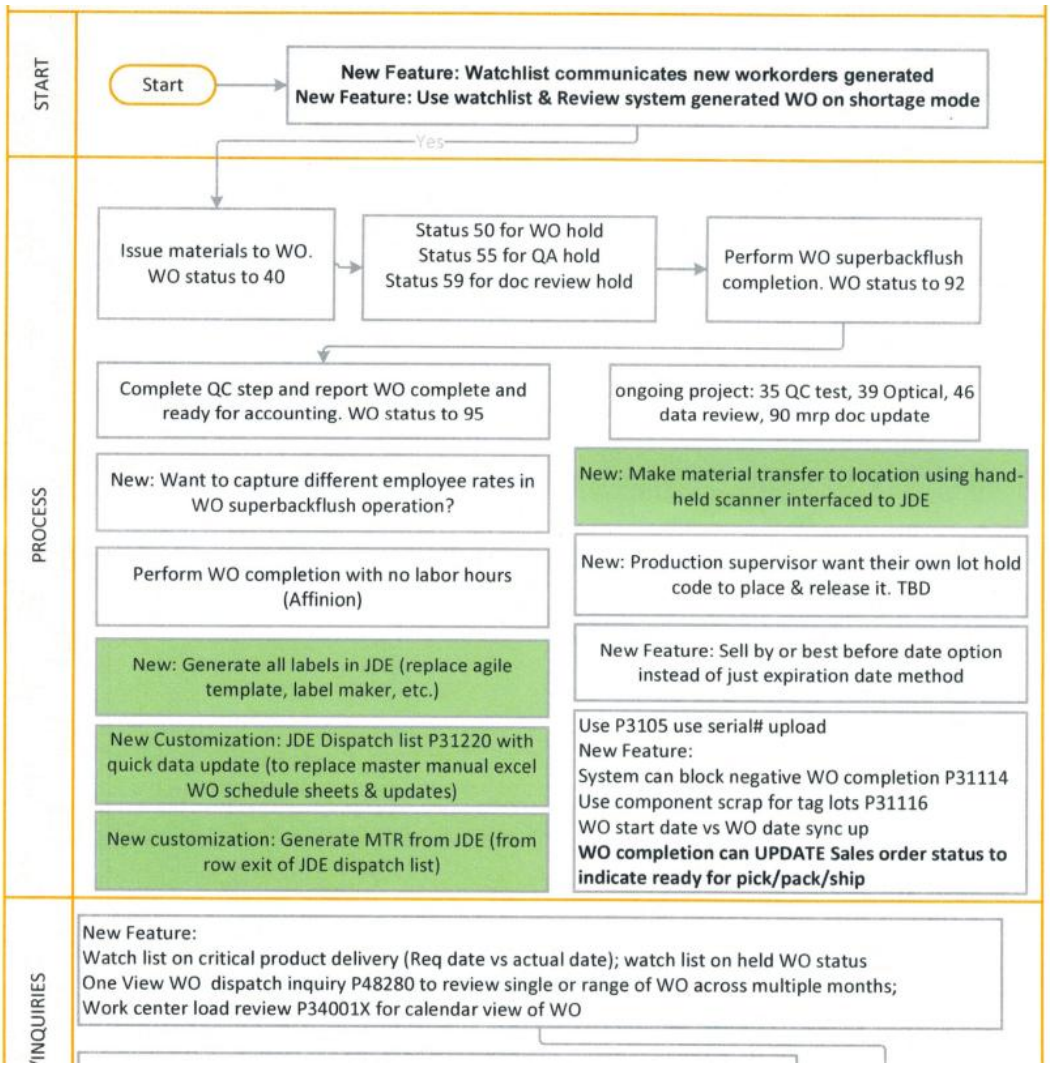
Functional Area	Manufacturing
Industry	Life Science
Scope	Discovery phase to 9.2
Description	Explore the 9.2 functionality for business usage. Moving from 9.1
Modules	PDM, Planning, Costing, Work Orders, Inventory including cycle count
Complexity	Lots of opportunity to automate the business transaction, manual printing, and interface to external systems
Plus Points	Life science industry dictates business process flow mapping and formal documentation.

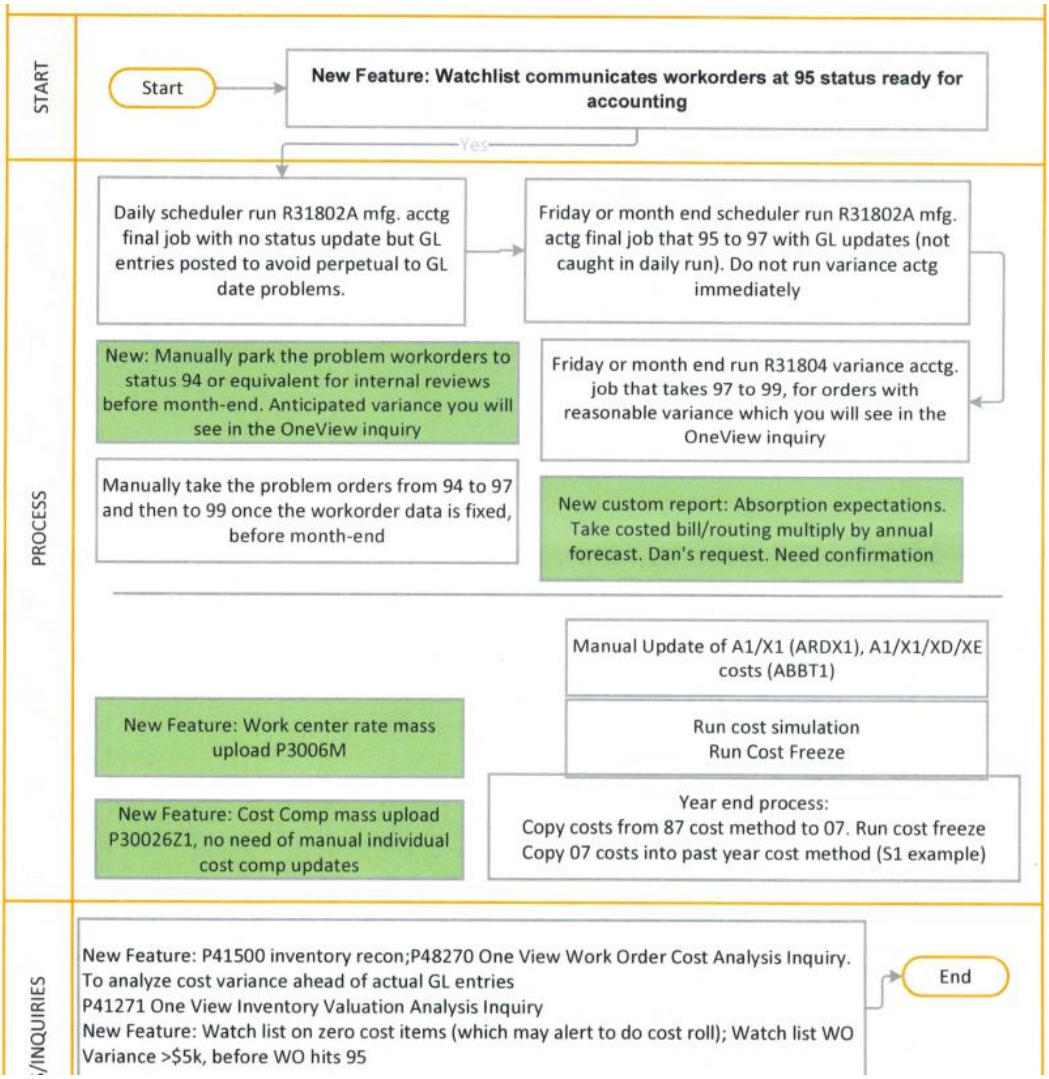

PDM
Start
Item Master
Item Branch
Bill of Materials
Routing
Work Centers
Work Center Rates
FORECASTING
Generate OR
Load Forecasts
On hand inventory
Safety Stock
Open Work orders, Purchase orders, Sales orders
PLANNING
MRP
-Release Work orders
- Release purchase orders
WORK ORDERS
Process Work Orders
Material issues
Report Completion
Work order
Scheduling
mrp doc: manufacturing batch record updates
COST ACCOUNTING
Run Manufacturing Accounting
Run Variance Accounting
Perform Cost Rolls (individual or annual)
QUALITY CONTROL /ASSURANCE
WO status 50 to 40
WO status 92 to 95
Test Result Entry
Non-Conformance Processing
Trace/Track
End

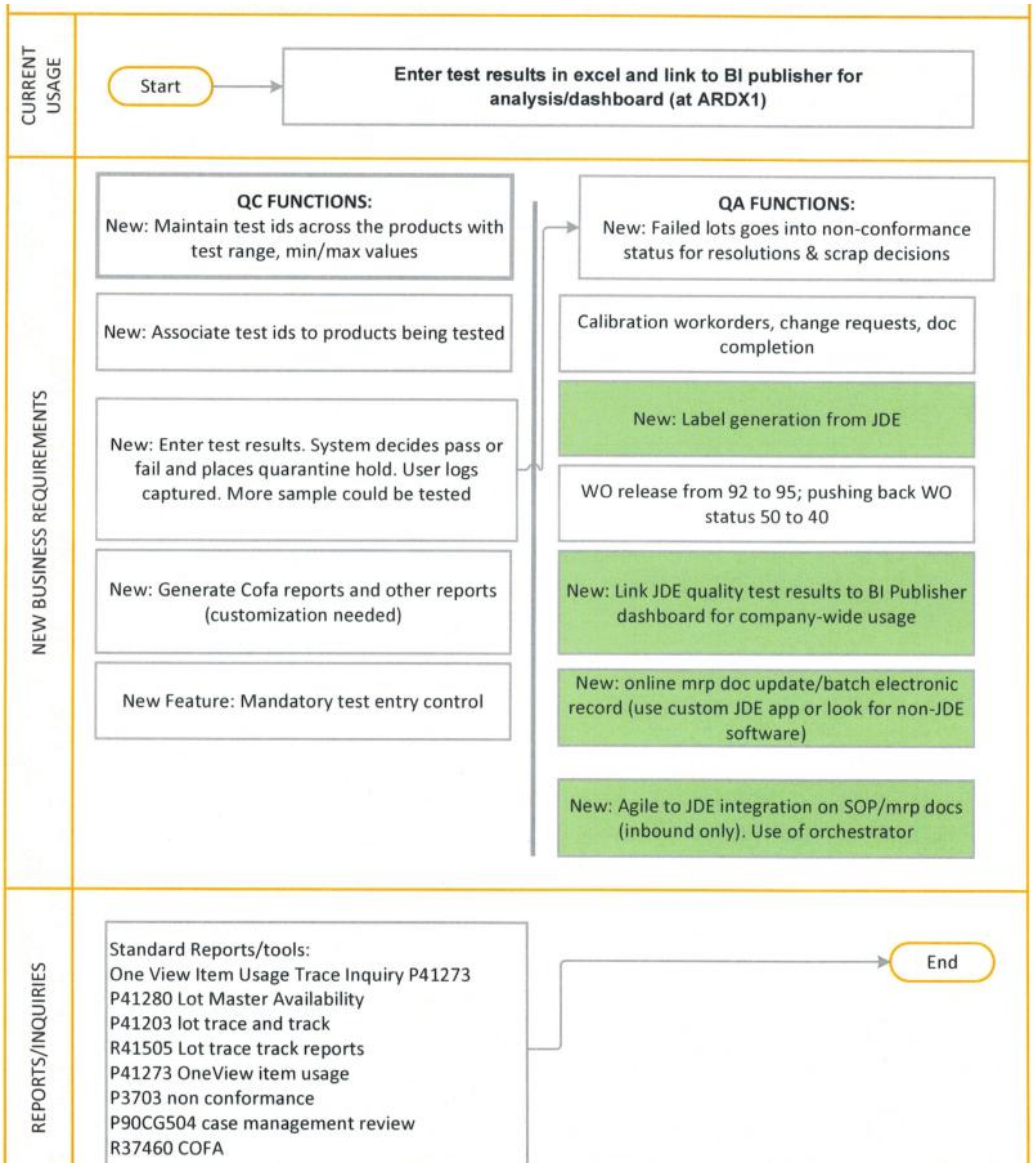

START
PROCESS
REPORTS/INQUIRIES
Start
Receive forecast data from demand planners
Yes
Manual work: Monthly update sKu#,date,qty on PP forecast type, 18months forward
Manual work: SKU level update cut & paste
New Upload: Do mass upload using P3460Z1i
New Feature: Use forecast purge P3460Z1P
New Feature: Forecast Generation R34650, BF type. System decides the best amongst 14 statistical models. User can compare this with demand planner's data
Redundant work: No need to delete past month data manually
New: BI Reports: Analyze forecast accuracy (BF, PP vs AA)
End


START
Start
Receive New Purchased/ Manufactured Part introduction form (referring copy-from part#)
PROCESS
Create item master, item branch, bills and routings. Use copy option from item referred
Yes
Major Effort: Agile to JDE integration on items, bills, item/bill revisions. Use of orchestrator
New Feature: Turn on bill logging at Branch Plant. Use P3011 bill log file
New Feature: Bill mass upload P3002Z1 (use in data migration, if CT bill merge is still open)
New Feature: Use P3002CPY for branch to branch bill copy (if applicable, future)
New Feature: Routing mass upload P3003Z1 (use in data migration)
New Feature: Use item substitution at bill levels P3002S, which will automatically place substitution in the workorders parts list
New Feature: Safety stock calc, user review and mass update P3425/ R3425. No need to run static report and manual updates
New Feature: Leadtime rollup R30882A to get actual data
New Feature: ABC classification update R4164 for better cycle count analysis
REPORTS/INQUIRIES
New Feature: Form extension to include all row exit values like planning into main grid (item branch application)
End


START
Start
Receive inter-company purchase order
Yes
PROCESS
Enter SG sales order, Item#, request date, quantity. New process: Using W line type
New Feature: Auto generated WO from SG order. WO status 10
New Feature: Auto attach parts list/ routing during WO generation. WO status 30. If there is parts shortage it goes to 25 (new) status automatically
New Feature: Auto pick loc/lot for reagents if you want to soft commit the materials
Use JDE MRP to process messages (WO) into sub-assembly (buffer, semi-finish)
Use JDE MRP to process messages into component purchase orders after sub-assembly needs are formalized
New: User JDE MRP message to release purchase order lines from blanket order
New Feature: Use WO entry version to generate non-M type bills/routings, example validation batches, trial runs. Use V or T bill/routing type (example) This is NOT regular manufacturing
New Feature: PO Generator for safety stock items (non-MRP)
New Feature: Sell by or best before date option instead of just expiration date method (if needed in the future)
REPORTS/INQUIRIES
New Feature:
Watchlist on past due orders (WO, PO)
CAFE1 S&OP dashboard on SO,WO,Inventory
P48290 One View Planning Analysis Inquiry
P34X200 Planning Console - S&D chart views
End


START
Start
New Feature: Watchlist communicates new workorders generated
New Feature: Use watchlist & Review system generated WO on shortage mode
Yes
PROCESS
Issue materials to WO. WO status to 40
Status 50 for WO hold
Status 55 for QA hold
Status 59 for doc review hold
Perform WO superbackflush completion. WO status to 92
Complete QC step and report WO complete and ready for accounting. WO status to 95
ongoing project: 35 QC test, 39 Optical, 46 data review, 90 mrp doc update
New: Want to capture different employee rates in WO superbackflush operation?
New: Make material transfer to location using hand-held scanner interfaced to JDE
Perform WO completion with no labor hours (Affinion)
New: Production supervisor want their own lot hold code to place & release it. TBD
New: Generate all labels in JDE (replace agile template, label maker, etc.)
New Feature: Sell by or best before date option instead of just expiration date method
New Customization: JDE Dispatch list P31220 with quick data update (to replace master manual excel WO schedule sheets & updates)
Use P3105 use serial# upload
New Feature:
System can block negative WO completion P31114
Use component scrap for tag lots P31116
WO start date vs WO date sync up
WO completion can UPDATE Sales order status to indicate ready for pick/pack/ship
New customization: Generate MTR from JDE (from row exit of JDE dispatch list)
INQUIRIES
New Feature:
Watch list on critical product delivery (Req date vs actual date); watch list on held WO status
One View WO dispatch inquiry P48280 to review single or range of WO across multiple months;
Work center load review P34001X for calendar view of WO


START
Start
New Feature: Watchlist communicates workorders at 95 status ready for accounting
Yes
PROCESS
Daily scheduler run R31802A mfg. acctg final job with no status update but GL entries posted to avoid perpetual to GL date problems.
Friday or month end scheduler run R31802A mfg. actg final job that 95 to 97 with GL updates (not caught in daily run). Do not run variance actg immediately
New: Manually park the problem workorders to status 94 or equivalent for internal reviews before month-end. Anticipated variance you will see in the OneView inquiry
Friday or month end run R31804 variance acctg. job that takes 97 to 99, for orders with reasonable variance which you will see in the OneView inquiry
Manually take the problem orders from 94 to 97 and then to 99 once the workorder data is fixed, before month-end
New custom report: Absorption expectations. Take costed bill/routing multiply by annual forecast. Dan's request. Need confirmation
Manual Update of A1/X1 (ARDX1), A1/X1/XD/XE costs (ABBT1)
New Feature: Work center rate mass upload P3006M
Run cost simulation
Run Cost Freeze
New Feature: Cost Comp mass upload P30026Z1, no need of manual individual cost comp updates
Year end process:
Copy costs from 87 cost method to 07. Run cost freeze
Copy 07 costs into past year cost method (S1 example)
/INQUIRIES
New Feature: P41500 inventory recon;P48270 One View Work Order Cost Analysis Inquiry. To analyze cost variance ahead of actual GL entries
P41271 One View Inventory Valuation Analysis Inquiry
New Feature: Watch list on zero cost items (which may alert to do cost roll); Watch list WO Variance >$5k, before WO hits 95
End


CURRENT USAGE
Start
Enter test results in excel and link to BI publisher for analysis/dashboard (at ARDX1)
NEW BUSINESS REQUIREMENTS
QC FUNCTIONS:
New: Maintain test ids across the products with test range, min/max values
New: Associate test ids to products being tested
New: Enter test results. System decides pass or fail and places quarantine hold. User logs captured. More sample could be tested
New: Generate Cofa reports and other reports (customization needed)
New Feature: Mandatory test entry control
QA FUNCTIONS:
New: Failed lots goes into non-conformance status for resolutions & scrap decisions
Calibration workorders, change requests, doc completion
New: Label generation from JDE
WO release from 92 to 95; pushing back WO status 50 to 40
New: Link JDE quality test results to BI Publisher dashboard for company-wide usage
New: online mrp doc update/batch electronic record (use custom JDE app or look for non-JDE software)
New: Agile to JDE integration on SOP/mrp docs (inbound only). Use of orchestrator
REPORTS/INQUIRIES
Standard Reports/tools:
One View Item Usage Trace Inquiry P41273
P41280 Lot Master Availability
P41203 lot trace and track
R41505 Lot trace track reports
P41273 OneView item usage
P3703 non conformance
P90CG504 case management review
R37460 COFA
End

JDE DISCOVERY STANDARD QUESTIONNAIRE

JDE MASTER DATA REVIEW									version 1.0
note: Observations from data analysis using data browser (production system)									
	JDE INSTANCE	RELEASE : 9.2 TOOLS:9.2.5.2			Fiscal period: calender year				
	Number of companies								
	Number of branches								
	Number of mfg branches	7							
		common	CR branch						
1	item master records								
2	item branch records								
3	Bill of material records								
4	Routing records								
5	Type of bills								
6	Type of routings								
7	Type of workorders								
8	Workcenter records								
9	WO records								
10	SO records								
11	PO records								
12	Item cost records								
13	costing method used								
14	Branch relationship record								
15	MRP usage								
16	PO Generator Usage								
17	Line type Usage								
18	WO Status Codes total								
19	PO OAR OP-S								
20	SO OAR SO-S								
21	CUSTOM FORMS EXT								
22	CUSTOM FORMS INT								
23	CUSTOM REPORTS								
24	CUSTOMIZATION								
25	REPORTING TOOLS								
26	DATA EXTRACTS TOOL								
27	TESTING TOOL								

JDE PRODUCT DATA MANAGEME	DISCOVERY AGENDA	
	area	questions
1	item master & branch **addition**	who owns the process. Steps involved in the process. Any interfaces with Agile or third-party tools
2	item master & branch **changes**	Who owns the modifications. What is the process and how the change is communited back to the requestor
3	item branch uniqueness	lot tracked; planning data, accounting cost quantity field used?
4	category code usage	specific logic and its application in reports/processes
5	bill of materials **addition**	who owns the process. Steps involved in the process. Any interfaces with Agile or third-party tools
6	bill of materials **changes**	Who owns the modifications. What is the process and how the change is communited to the requestor. See process flow
7	routing **additions**	who owns the process. Steps involved in the process. Any interfaces with Agile or third-party tools. See process flow.
8	routing **changes**	Who owns the modifications. What is the process and how the change is communicated to the requestor
9	bill of materials uniqueness	number of levels; usage of unit of measure, scrap/yield definitions; cost% differences, phantom items, batch bills?
10	routing uniqueness	labor/machine hours; batch size?. Any other uom (other than hrs)
11	alternate bills or routings	any other types of bills used in manufacturing or maintenance
12	master routings	any other types of routings used
13	costed bill or routing inquiry	User's knowledge and usage
14	any automated updates	example: bills low level codes update. Any automated update reports in scheduler
15	typical issues faced	details of repetitive (or) process mfg issues faced
16	user training & knowledge	APICS knowledge. General Training needs
17	Formal SOP & docs available?	Avaibility of SOPs
18	Data export/import	Does ERP data sent out to other third party systems.

JDE PRODUCT COSTING		DISCOVERY AGENDA
	area	questions
1	overall process	who owns the process. Steps involved in the process. Type of cost method used. Any interfaces with Agile or third-party tools
2	communication flows	communication process from master data manager to cost accountant and back
3	cost simulation	owner, frequency and reporting needs.
4	cost freeze	owner, frequency and reporting needs.
5	one-off cost freeze activities	how is the process handled?
6	reporting	standard JDE reports or any custom reports used.
7	inquiries	usage of standard JDE inquiries
8	work centers	number of work centers
9	WC rates	Who owns the process of updating rates. Rate freeze done manually?
10	ledger types	cost ledger types used. 07-standard
11	typical issues faced	details of functional issues faced in this process
12	user training and knowledge level	knowledge and training status
13	Formal SOP and dept docs available?	availability of SOPs
14	Data export	does data go into any other software:
15	annual budgeting process	product costing impact on the process.

JDE PLANNING		DISCOVERY AGENDA
	area	questions
1	Functionality used:	DRP/MPS/MRP. Sales and Product distribuiton
2	Frequency of gross & net generation	frequency period: how it is run: manual or scheduler. Daily full regeneration. Users can run net change
3	Planning parameters used	planning fence, freeze fence, etc. definitions
4	How is the planning messages converted for purchase orders?	message review and release
5	How is the planning messages converted for work orders?	message review and release
6	Planning message review frequency by users	message review frequency
7	min/max/safety stock definitions	business rules in this area
8	forecast consumption used?	ability to relate to forecast vs actual sales.
9	usage of planning category code (PRP4)	PRP3 and PRP4 codes used
10	Exception reporting, if any	
11	Planning metrix, if any	
12	capacity planning, used?	usage of scheduling tools
13	PO Generator functionality used?	PO Gen vs MRP
14	Version details of scheduler batches	business rules in this area
15	typical issues faced	discussion points
16	user training and knowledge level	Knowledge and training levels
17	Formal SOP and dept docs available?	status of documentation
18	Data export	Data export or import needs

JDE WORK ORDERS		DISCOVERY AGENDA
	area	questions
1	WO generation	define the various process involved. (example: from MRP, stand-alone). WO generation process
2	Status flow	define the status flow of the work orders.
3	Wo reviews	Who reviews and steps involved in the reviews.
4	functionality used	manual component issues,backflush, super backflush?
5	scrap	shrink vs scrap vs yield. How parent or component scrap reported?
6	WO printout	Custom format? Example of the format. JDE format needs mod?
7	Bar codes	Need for barcoding on WO form printout
8	Other reports	any specific reports/outputs till WO is completed. Reports that are in scheduler
9	shortage report	Mechanism to know the shortages once WO is released
10	material issues	When and what process is handling the issues.
11	labor entry	When and what process is handling the labor hrs entry
12	hand-over to accounting	Who and what stage the hand-over happens.
13	WO reversals	Any specific process on reversals or re-opening orders
14	negative issues	does stock goes below zero?
15	labor adjustments	does the labor adjusted after certain steps?
16	Outside operations.	#vendors, parts that goes through outside processing operations. Any functional process differences? Where the company inventory accounted?
17	typical issues faced	details of issues faced in this process
18	user training and knowledge level	status
19	Formal SOP and dept docs available?	status
20	external tools in time capture	like kronos?
21	Data export	does WO data go into any other software:

JDE MANUFACTURING ACCOUNTING		DISCOVERY AGENDA
	area	questions
1	process	who owns the process.
2	status flow	how the status of WO taken to 99
3	update frequency	Frequency of status changes. Whether manual or in scheduler?
4	Inquiries	Inquiries used in current system
5	Reports	usage of standard reports and custom reports (if any)
6	variance levels	how the variance $$ treated and reviewed
7	typical issues faced	details of functional issues faced in this process
8	user training and knowledge level	training status
9	Formal SOP and dept docs available?	documentation status
10	Data export	Does accounting data gets exported?:

QUALITY		DISCOVERY AGENDA
	area	questions
1	Functionality planned:	-Inbound (raw materials and components) quality checks
		-In process quality checks
		-Finished goods quality checks
2	High-level quality organizaion	corp organization; site-specific quality personnel; exceptions?
3	Quality process	When items/products goes into quality process? Who handles them. Are locations defined to seggregate 'under-quality check' items? Is there a quality hold process?
4	Testing	Testing templates, certificate outputs. Any other systems used in capturing the transaction data?
5	product quarantine time	Does FG goes into quarantine (like cooling time) before it is available for use at next level (or) for sale? Does the expiration date need to exclude this quarantine time?
6	Lot control	Vendor's lot number, expiration dates captured? Shelf life on items (raw materials and finished goods). How are expired items identified and re-processed?
7	Lot specification	Is the lot number, a running sequential SERIAL number (or) had the logic of date/time/batch#?
8	Lot trace and track	-Business requirement on forward and backward tracking of lots. (both raw materials and end-items). Last product recalls?
		-Cross-reference vendor lot number to internal lot number?
9	Quality time & Labor	Business need on capturing time spent on quality checks during the work-order process.
		Requirement on including quality quarantine time in the total cycle time of product manufacturing
10	Quality reporting	Specific reports sent to corporate (or) customers
11	quality documents	-templates used in collecting test data;sample COfA
		-templates/sample on test plans, test specifications
		-any customer specific certificates generated
12	Quality reporting	Reports sent to corporate (or) customers(or) external agencies
13	Quality documents archival	Electronic document storage and retrieval process
14	Attaching documents into JDE	Business need on attaching documents at JDE transactions. (example: media objects, specs, results)
15	Work flow	How the new test specification approval flow is handled?
16	typical issues faced	details of repetitive issues faced in this process
17	user training & knowledge level	level of knowledge on integrated systems
18	Formal SOP and dept docs:	Does department have formalized documents?
19	Data export	Does data go into any other software: like Agile, data warehouse and other software tools?
20	Quality to other system interfaces	Any inbound or outbound data transfer to other systems. (internal and/or customer portals)

JDE PROCUREMENT		DISCOVERY AGENDA
	area	questions
1	Functionality used:	stock purchasing; non-stock purchasing; outside operations (sub-contracting); service orders; blanket PO
2	High-level procurement organizaion	corporate purchase; site-specific purchasing; exceptions?
3	Requisition process	Who and When purchasing demand is generated? How does the requisition flow handled?
4	bids handling	Does this functionality in JDE need to be used?
5	Buyer/Planner roles	How the purchasing organization works? Products/components assigned to specific buyers based on their skill sets. Is there master scheduler role different from buyer role?
6	MRP Frequency of gross & net generation	frequency period: how it is run: manual or scheduler. Daily full regeneration. Users can run net change
7	Type of purchase orders	various orders types like OP, OS, ON
8	PO to AP process	two-way match, 3 way match. Any special exceptions like direct voucher payment
9	Typical purchase order flow	PO status flow. From 200 to 999. various steps involved in PO creation, PO approvals, PO print, receiving and close
10	purchase orders closing	Does receiving close purchase order after receipts? Or buyers review open Pur orders and close them periodically
11	PO Work flow	How the approval flow is handled? Approval levels in dollar terms
12	purchase order print out	Specific format. Any variance to the formats expected.
13	usage of planning category code (PRP4)	PRP3 and PRP4 codes used?
14	Item supplier relationships; cost methods; vendor qualification and analysis.	Usage of these functionality
15	Exception reporting, if any	list of all custom reports
16	PO tolerance	Any specific rules adopted?
17	Blanket PO, Agreements, catalogs	Usage of these functionality
	Stocking policies	min/max, reorder points?
18	PO Generator functionality used?	
19	Version details of scheduler batches	List of programs running on scheduler and their frequency
20	typical issues faced	details of repetitive issues faced in this process
21	user training and knowledge level	level of knowledge
22	Formal SOP and dept docs available?	Does department have formalized documents?
23	Data export	Does data go into any other software: like Agile, data warehouse and other software tools?

JDE CAM		DISCOVERY AGENDA
	area	questions
1	Where are the assets records maintained?	Software system used currently and its completeness
2	How are regular preventive maintenance planned and executed	usage of manual or software systems
3	How is maintenance items controlled?	inventory management
4	Management approvals and authority to start a major maintenance work	Formal SOP and approval levels
5	Use of external vendors for inhouse maintenance activities	contracts; labor usage; material usage (free issues or charge backs)
6	Regulatory requirements	State or Federal monitoring and reporting requirements
7	WO generation	define the various process involved. (example: from MRP, stand-alone). WO generation process
8	Status flow	define the status flow of the work orders. (manual or system controlled)
9	Wo reviews	Who reviews and steps involved in the reviews.
10	WO printout	Custom format? Example of the format. JDE format needs mod?
11	Bar codes	Need for barcoding on WO form printout
12	Other reports	any specific reports/outputs till WO is completed.
13	material issues	When and what process is handling the issues.
14	labor entry	When and what process for handling the labor hrs entry
15	hand-over to accounting	Who and what stage the hand-over happens.
16	WO reversals	Any specific process on reversals or re-opening orders
17	user training and knowledge level	status
18	Formal SOP and dept docs available?	status
19	external tools in time capture	like kronos?
20	Data export	does CAM/WO data go into any other software:?

JDE sales orders		DISCOVERY AGENDA
	area	questions
1	What branches handle sales orders	Software system used currently and its completeness
2	How many sales order types?	Quotes, regular orders, international orders, transfer orders
3	What status it goes through?	Regular and exception status, based on order types
4	Overall flow and approval levels	Formal SOP and approval levels
5	Use of external vendors for inhouse activities	contracts; third party interfaces, EDI
6	Regulatory requirements	State or Federal monitoring and reporting requirements
7	WO generation	define the various process involved. (example: from MRP, stand-alone). WO generation process
8	Status flow	What activity moves the order status?
9	SO reviews	Who reviews and steps involved in the reviews.
10	SO printout	Custom format? Example of the format. JDE format needs mod?
11	Bar codes	Need for barcoding on form printout
12	Other reports	any specific reports/outputs till SO is completed.
13	Material issues	When and what process is handling the issues.
14	Labor entry	When and what process for handling the labor hrs entry
15	hand-over to accounting	Who and what stage the hand-over happens.
16	SO reversals	Any specific process on reversals or re-opening orders
17	user training and knowledge level	status
18	Formal SOP and dept docs available?	status
19	external tools	like advanced planning tools
20	Data export	does data go into any other software:?

JDE PRICING		DISCOVERY AGENDA
	area	questions
1	What are customer price breaks?	Software system used currently and its completeness
2	What are item price breaks?	usage of manual or software systems
3	Complexity in the pricing process	Regular and exceptions
4	Frequency of price changes and lists	Formal SOP and approval levels
5	Use of external vendors for inhouse maintenance activities	Third party integrations
6	Regulatory requirements	State or Federal monitoring and reporting requirements
7	WO generation	define the various process involved. (example: from MRP, stand-alone). WO generation process
8	Status flow	What activity moves the order status?
9	SO reviews	Who reviews and steps involved in the reviews.
10	SO printout	Custom format? Example of the format. JDE format needs mod?
11	Bar codes	Need for barcoding on WO form printout
12	Other reports	any specific reports/outputs till WO is completed.
13	material issues	When and what process is handling the issues.
14	labor entry	When and what process for handling the labor hrs entry
15	hand-over to accounting	Who and what stage the hand-over happens.
16	SO reversals	Any specific process on reversals or re-opening orders
17	user training and knowledge level	status
18	Formal SOP and dept docs available?	status
19	external tools	like advanced planning tools
20	Data export	does data go into any other software:?

LISTING OF KEY ONE VIEW APPLICATIONS & Z FILES

Object Name	Member Description
P03B2022	One View Customer Ledger Inquiry
P03B202X	One View Customer Ledger Inquiry - Analytic Components
P03B720	One View Customer Receipt/Draft Inquiry
P03B720X	One View Customer Receipt/Draft Inquiry - Analytic Component
P042022	One View Supplier Ledger Inquiry
P042022X	One View Supplier Ledger Inquiry - Analytic Components
P04720	One View Supplier Payment Inquiry
P04720X	One View Supplier Payment Inquiry - Analytic Components
P07136	One View Tax History Inquiry
P07136X	One View Tax History Inquiry - Analytic Components
P07146	One View PDBA History Inquiry
P07146X	One View PDBA History Inquiry - Analytic Components
P071862	One View Pay History Detail Inquiry
P071862X	One View Pay History Detail Inquiry - Analytic Component
P071902	One View DBA History Detail Inquiry
P071902X	One View DBA History Detail Inquiry - Analytic Components
P080110	One View Employee Address Book Inquiry
P080120	One View Employee Profile Inquiry
P080120X	One View Employee Profile Inquiry - Analytic Components
P08234	One View Employee Benefits Inquiry
P08234X	One View Employee Benefits Inquiry - Analytic Component
P09217	One View Account Balance Inquiry
P09217X	One View Account Balance Inquiry - Analytic Components
P09219	One View G/L Inquiry
P09219X	One View G/L Inquiry - Analytic Component
P13230	One View Equipment Location Inquiry
P13230X	One View Equipment Location Inquiry - Analytic Components
P13400	One View Equipment Status Information
P13400X	One View Equipment Status Information - Analytic Components
P13500	One View Equipment License/Permit Information
P13560	One View Work Order Analysis
P13560X	One View Equipment WO Analysis Inquiry - Analytic Components
P13570	One View PM Analysis
P13570X	One View PM Analysis - Analytic Components
P15260	One View Property Inquiry
P15260X	One View Property Inquiry - Analytic Components
P15270	One View Attribute Inquiry
P1727	One View Service Contract Inquiry
P1727X	One View Service Contract Inquiry - Analytic Components

P1730	One View Service Contract Profitability Inquiry
P1730X	One View Service Control Profitability - Analytic Components
P41270	One View Average Cost Analysis from Item Ledger Inquiry
P41271	One View Inventory Valuation Analysis Inquiry
P41272	One View Inventory Cost Analysis By Item As Of Inquiry
P41273	One View Item Usage Trace Inquiry
P41273X	One View Item Usage Trace Inquiry - Analytic Components
P42270	One View Open Sales Inquiry
P42271	One View Historical Sales Inquiry
P42272	One View Sales To Date Inquiry
P42272X	One View Sales To Date Inquiry - Analytic Components
P42273	One View Sales Price Inquiry
P42I270	One View Outbound Agreement Inquiry
P42I270X	One View Outbound Agreement Inquiry - Analytic Components
P42I271	One View Outbound Inventory Valuation Inquiry
P42I272	One View Outbound Inventory Consumption Inquiry

P43260	One View Purchase Order Receipts Inquiry
P43260X	One View Purchase Order Receipts Inquiry - Analytic Component
P43261	One View Purchase Order Inquiry
P43261X	One View Purchase Order Inquiry - Analytic Components
P43262	One View Subcontract Inquiry
P43263	One View PO Vouchers Payment Inquiry
P43264	One View Backordered Items Not Received Inquiry
P43265	One View Simple Procurement Inquiry
P43266	One View Supplier Cost Analysis Inquiry
P43266X	One View Supplier Cost Analysis Inquiry - Analytic Component
P43267	One View Requisition Self Service Inquiry
P43267X	One View Requisition Self Service Inquiry - Analytic Company
P46270	One View Warehouse Request Inquiry
P46270A	One View Warehouse Request Analysis
P46270X	One View Warehouse Request Inquiry - Analytic Component
P46271	One View Warehouse Suggestion Inquiry
P46273	One View Warehouse Location Inquiry
P46273X	One View Warehouse Location Inquiry - Analytic Component
P46L272	One View License Plate

	Quantities Inquiry
P48270	One View Work Order Cost Analysis Inquiry
P48270X	One View Work Order Cost Analysis Inquiry-Analytic Component
P48280	One View Manufacturing Dispatch Inquiry
P48290	One View Planning Analysis Inquiry
P48290X	One View Planning Analysis Inquiry - Analytic Components
P49270	One View Transportation Shipment Inquiry
P49270X	One View Transportation Shipment Inquiry - Analytic Component
P49271	One View Transportation Load Inquiry
P49271X	One View Transportation Load Inquiry - Analytic Components
P51220	One View Job Inquiry
P54HS220	One View Incident Summary Inquiry
P54HS22X	One View Incident Summary Inquiry - Analytic Components
P54HS230	One View Incident People Inquiry
P54HS23X	One View Incident People Inquiry-Analytic Component
P54HS240	One View Incident Equipment Inquiry
P54HS250	One View Environmental Incident Inquiry
P54HS260	One View Safety Statistics Inquiry
P54HS26X	One View Safety Statistics Inquiry -Analytic Components
P54R200	One View Rental Contract

	Inquiry
P54R200X	One View Rental Contract Inquiry - Analytic Components
P54R210	One View Rental Contract Profitability Inquiry
P54R210X	One View Rental Contract Profitably Inq - Analytic Components
P54R220	One View Rental Contract Related Order Inquiry
P54R220X	One View Rental Cont. Related Order Inq - Analytic Components
P7713	One View Canadian Tax History Inquiry
P90CG530	One View Case Mgmt. Inquiry
P90CG53X	One View Case Mgmt. Inquiry - Analytic Components

Object Name	Member Description
P0006Z	Business Unit Inbound Application
P0007Z1	Work Day Calendar Transaction Revisions
P0010Z	Company Inbound Application
P0015Z1	External Currency Exchange Rates Revisions
P0040Z1	Store And Forward Error Log
P0041Z1	Store and Forward Transaction Control
P0101Z1	Batch Address Book Revision
P0111Z1	Who's Who Batch Revision
P0111Z1A	Who's Who Address Book Number Assignment
P0301Z1	Batch Customer Master
P03B11Z1	Batch Invoice Revisions
P03B41Z1	Deductions Interop Revision
P0401Z1	Batch Supplier Master Revision
P0411Z1	A/P Batch Voucher Entry
P0413Z1	Interoperability Revisions for F0413/F0414
P05100Z	Manage Resource Competencies
P05116Z1	Payroll Batch File Review
P05116Z2	F06116Z1 Timecard History
P0902Z1	PC Budget Upload Account Balances
P0911Z1	Store & Forward Journal Entry - Revisions
P1002Z1	Inbound Multi-Site Consolidation Record Revisions
P1201Z1	Unedited Asset Master Transactions Revision
P12120Z1	Meter Reading Transactions Revisions
P1217Z1	Unedited Equipment Tag Transactions Revision
P1217Z2	Unedited Equipment Tag Transactions Revision
P1310Z1	Unedited Condition-Based Alerts Revisions
P15017Z1	Review Unedited Lease Master Detail Transactions
P1501BZ1	Review Unedited Lease Master Transactions
P1502BZ1	Review Unedited Recurring Billing Transactions
P1507Z1	Review Unedited Unit Master Transactions
P1511BZ1	Review Unedited Manual Billing Transactions
P1512Z1	Review Unedited Bill Code Transactions
P1514Z1	Review Unedited Area Master Transactions
P1602Z1	External Cost Analyzer Balances
P1632Z1	External Driver Balances
P174801Z	Warranty Claim/Supplier Recovery processing
P30006Z1	Work Center Transaction Revisions
P30026Z1	Item Cost Components Revisions
P3002Z1	Revise Bill of Material Transactions
P3003Z1	Routing Transaction Revisions

P30161Z1	Kanban Transactions Revisions
P3111Z1	Work Order Inventroy Issues Transactions Revisions
P31122Z1	Work Order Time Transactions Unedited Transaction Table
P3112Z1	Work Order Super Backflush Transactions Revision
P31B17Z1	Revise Operations EUR Transaction
P31B18Z1	VBT Barrel Transaction
P31B19Z1	Instructed Attributes
P31B31Z1	Revise Operations Composition Transaction
P31B34Z1	Revise Operations Style Transaction
P31B3CZ1	Revise Operations Cost Transaction
P31B52Z1	Revise Operations Equipment Transaction
P31B53Z1	Revise Operations Consumable Transaction
P31B65Z1	Revise Operations Transaction
P31B85Z1	Revise Weigh Tag Detail Transaction
P31B93Z1	Revise WorkOrder Transaction
P31B97Z1	Revise Operations Resource Transaction
P31BQAZ1	Revise Operations Quality Test Transaction
P31BSPZ1	Sample Transaction Revision
P3460Z1	Forecast Transactions Revisions
P3711Z1	Test Results Transactions Revisions
P4004Z	Recurring Orders
P4101Z1	F4101Z1 Item Master Revisions
P41021Z1	Item Location Unedited Transactions
P4105Z1	Item Cost Revisions Application
P4106Z1	Unedited Transactions - Item Price
P4141Z1	F4141Z1 Cycle Count Revisions
P4211Z1	Outbound Sales Transaction Record Revisions
P43092Z1	Receipt Routing Unedited Transactions
P4311Z1	Inbound Batch Puchase Orders
P43121Z1	Receipts Unedited Transaction Revisions
P44H101Z	HB Community Master Revisions
P44H201Z	HB Lot Master Revisions
P44H501Z	HB Sales Master Revisions
P44H604Z	HB Vendor Assignment Revisions
P44H711Z	HB Lot Start Work File Revisions
P4572Z1	Live Promotions Batch Revisions
P4611Z1	Inbound Suggestions Unedited Transactions Inquiry
P4801Z1	Outbound Work Order Revisions
P4942Z1	Sales Order Detail Revision Program

P703B1Z1	Sales EDI Invoice Number
P70XMLZ1	XML Transaction Review
P74H50Z1	Electronic Invoice Response - HUN - 74H
P74L03BZ	Signed Batch Invoice Entry - POR - 74L
P74P411Z	Batch Voucher Entry Additional Info - POL - 74P
P74XMLZ1	XML Transaction Interface
P74Z0010	Review Cash Desk Document - CZE - 74Z
P74Z0020	Czech Sentence TaxArea Mapping - CZE - 74Z
P74Z0021	Czech VAT Control Report Transaction - CZE - 74Z
P74Z0023	Czech Tax Rate Type Mapping - CZE - 74
P74Z0024	Czech Document Type Course Code Mapping - CZE - 74
P75T004Z	GUI/VAT Working Table Review - 75T
P75T009Z	GUI Customer Constant Data Conversion - 75T
P75Z0002	New Zealand Employee Tax Overrides
P75Z0003	New Zealand Employee Holiday and Leave Data
P75Z0008	Maintain New Zealand Special Holiday Rates
P75Z0010	New Zealand Tax Detail
P75Z002A	New Zealand Processing Options
P75ZTAX	Tax Exemption Revisions - New Zealand
P76A010Z	F0101Z2 Argentinean Tag File - ARG - 01
P76B12TZ	NF-e Response Process Batch Input - BRA - 76B
P76B3BZ2	F7603BZ2 Flat File Update -Brazil - 03B
P76H101Z	EDI - A/B Tag File Maintenance- CHI - 76H - 76H
P76P101Z	EDI - A/B Tag File Maintenance- PER - 76P - 76P
P76P393Z	Calculated Costs detail Z1 - PER - 41 - 76P

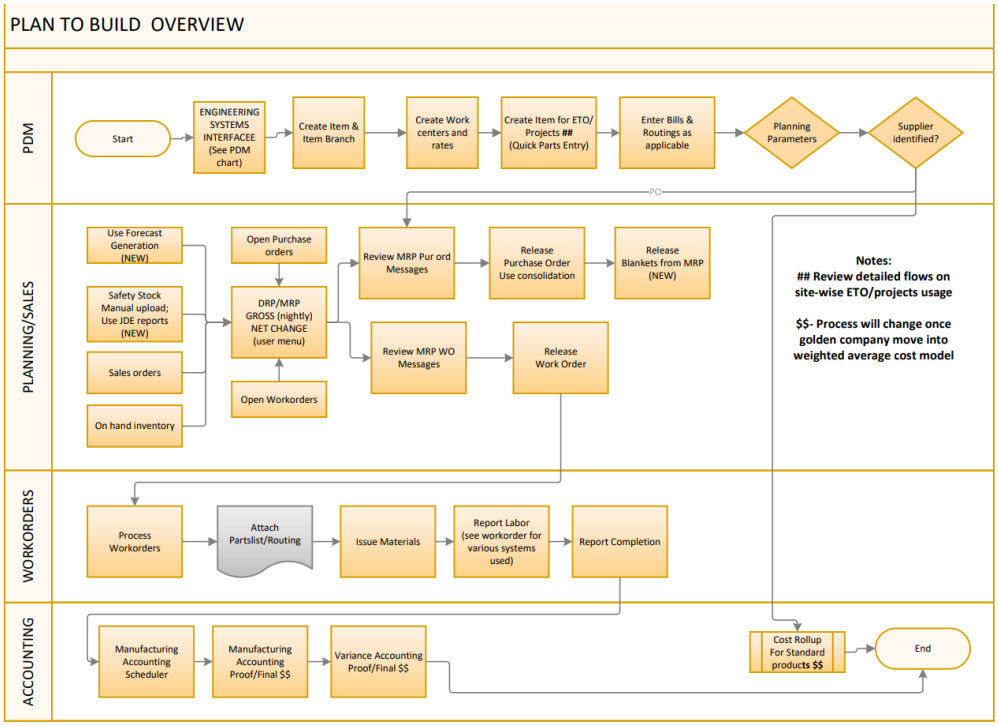
Application	Application Title
R0007Z1I	Process Inbound Work Day Calendar
R0007Z1P	Purge Work Day Calendar Transactions
R30006Z1I	Process Inbound Work Center
R30006Z1P	Purge Work Center Transactions
R30026Z1I	Process Inbound Item Cost Components
R30026Z1P	Purge Cost Component Transactions
R3002Z1I	Process Inbound Bill of Material
R3002Z1P	Purge BOM Transactions
R3003Z1I	Process Inbound Routing
R3003Z1P	Purge Routing Transactions
R30161Z1I	Inbound Kanban Transaction
R30161Z1P	F30161Z1 Delete Kanban Transactions
R31113Z1I	Inbound Inventory Issues Transaction
R31114Z1I	Inventory Completion Inbound Processor
R3111Z1P	F3111Z1 Delete Inventory Issues Transactions
R31122Z1	F31122Z1 File Purge Report
R31122Z1I	Hours and Quantities Inbound Processor
R31123Z1I	Process Work Order Super Backflush Inbound Transactions
R3112Z1P	F3112Z1 Delete Super Backflush Transactions
R31B17Z1	Purge Operations Multiple EUR records
R31B18Z1	Purge VBT Barrel Transaction
R31B19Z1	Purge WIM Instructed Attributes
R31B31Z1	Purge Composition Z1 Records
R31B34Z1	Purge Style Z1 Records
R31B3CZ1	Purge Cost Z1 Records
R31B52Z1	Purge Equipments Z1 Records
R31B53Z1	Purge Consumables Z1 Records
R31B65AZ1I	Process Inbound Work Order for Blend

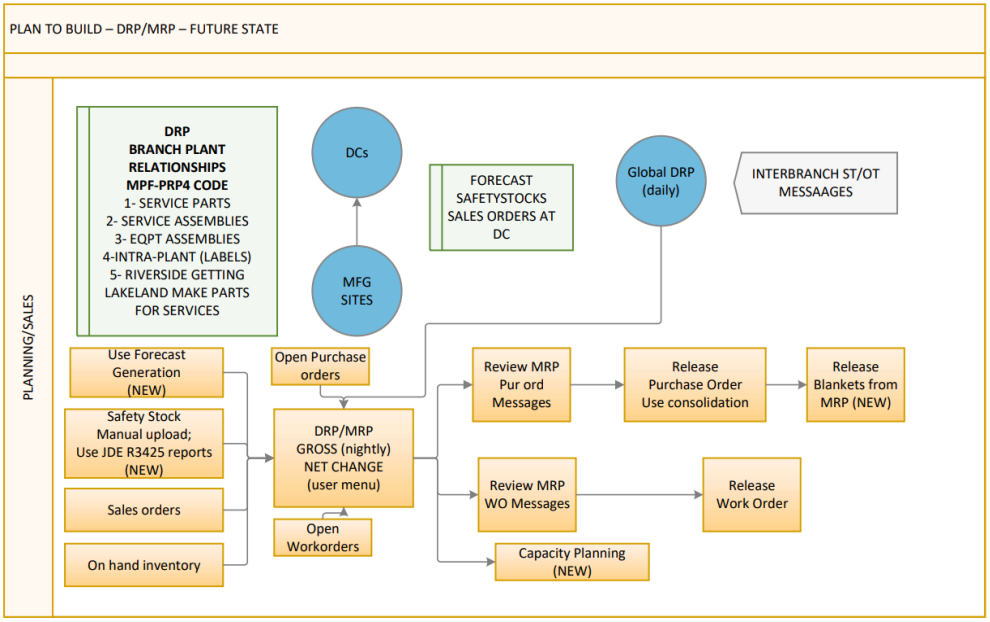
R31B65Z1	Purge Operations Records
R31B85Z1	Purge Weigh Tag Detail Transactions
R31B93Z1	Purge Work Order Records
R31B97Z1	Purge Resource Z1 Records
R31BQAZ1	Purge Quality Test Z1 Records
R31BSPLZ1	Purge Sample Z1 Records
R31BSPZ1	Process Inbound Sample for Blend
R4801Z1	F4801Z1 File Purge Report
R4801Z1I	Work Order Inbound Processor
R4801Z1P	Outbound Work Order Purge
R4801Z1X	Outbound Work Order Extraction
R4801ZI	SCP Inbound Work Orders
R893002Z1C	Data Conversion for F3002Z1 from Xe to B9
R893111Z1C	Data Conversion for R3111Z1 from Xe to B9
R893111Z1E	Convert F3111Z1 for the Euro
R8931122Z1	Convert F31122Z1 for the Euro
R8931122ZC	Data Conversion for F31122Z1 from Xe to B9
R8931122ZD	Data Conversion for F31122Z1 from 7331/7332 to B9
R893112Z1C	Data Conversion for F3112Z1 from Xe to B9
R893112Z1D	Data Conversion for F3112Z1 from 7331/7332 to B9
R893460Z1E	F3460Z1 Euro Conversion
R894801Z1C	Data Conversion for F4801Z1 from Xe to B9
R894801Z1D	Data Conversion for F4801Z1 from 7331/7332 to B9
R894801Z1S	Data Conversion for F4801Z1 from Xe to B9

JDE Discovery - Published March 2026

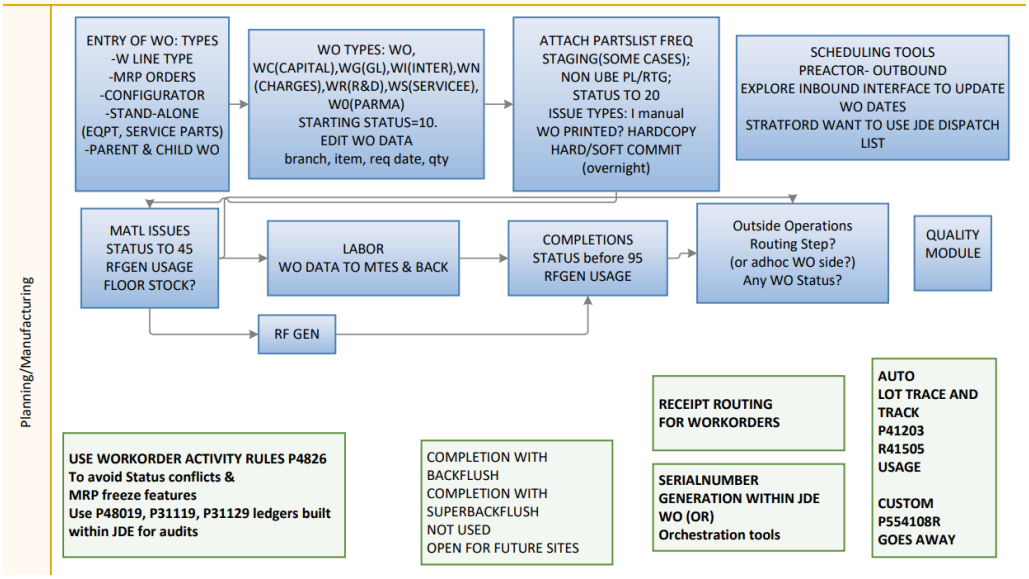
Functional Area	Manufacturing
Industry	Food processing equipment manufacturer
Scope	Discovery phase to 9.2
Description	Explore the 9.2 functionality for business usage. Moving from 9.1
Modules	PDM, Planning, Costing, Work Orders, Inventory including cycle count
Complexity	Lots of opportunity to automate the business transaction, manual printing, and interface to external systems. World-wide sites.
Plus Points	Multiple sites. Each site willing to learn things that are done in other sites.

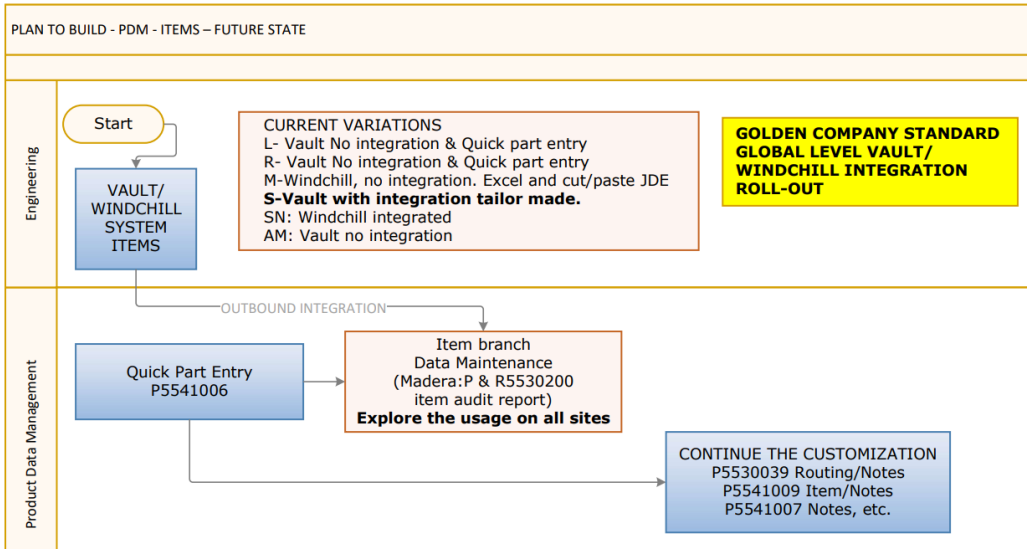
	Certain sites had its own advanced customization done to cater the needs.

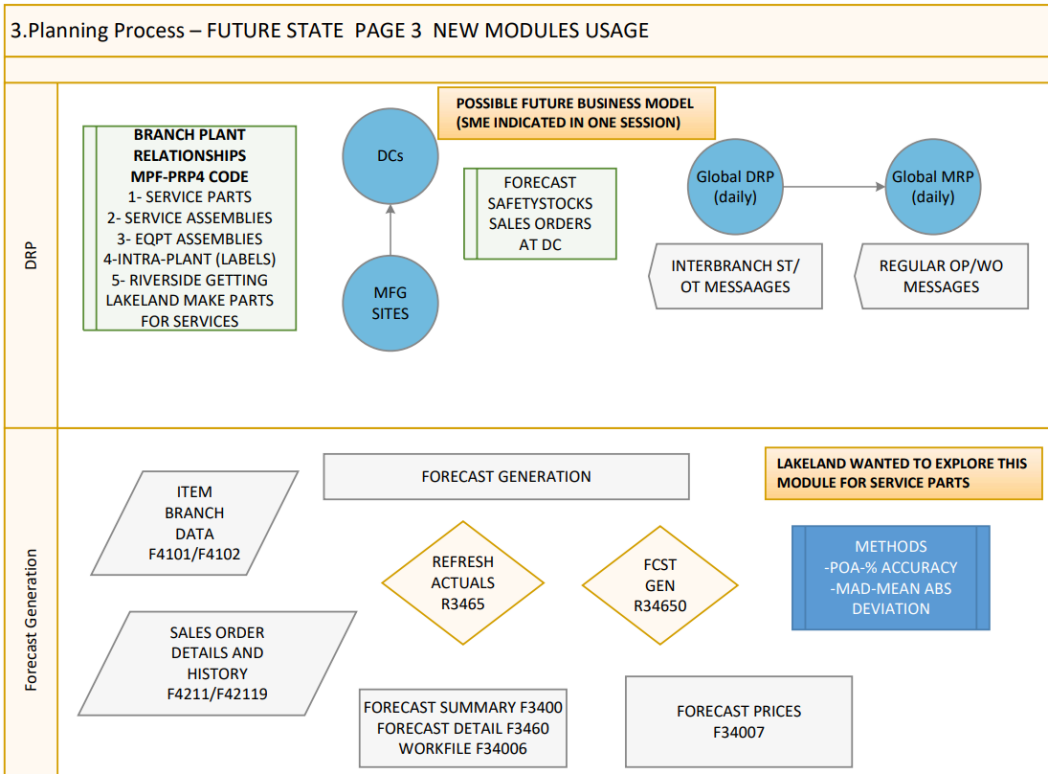

PLAN TO BUILD OVERVIEW
PDM
PLANNING/SALES
WORKORDERS
ACCOUNTING
Start
ENGINEERING SYSTEMS INTERFACEE (See PDM chart)
Create Item & Item Branch
Create Work centers and rates
Create Item for ETO/ Projects ## (Quick Parts Entry)
Enter Bills & Routings as applicable
Planning Parameters
Supplier identified?
PO
Use Forecast Generation (NEW)
Safety Stock Manual upload; Use JDE reports (NEW)
Sales orders
On hand inventory
Open Purchase orders
DRP/MRP GROSS (nightly) NET CHANGE (user menu)
Open Workorders
Review MRP Pur ord Messages
Release Purchase Order Use consolidation
Release Blankets from MRP (NEW)
Review MRP WO Messages
Release Work Order
Notes:
Review detailed flows on site-wise ETO/projects usage
$$- Process will change once golden company move into weighted average cost model
Process Workorders
Attach Partslist/Routing
Issue Materials
Report Labor (see workorder for various systems used)
Report Completion
Manufacturing Accounting Scheduler
Manufacturing Accounting Proof/Final $$
Variance Accounting Proof/Final $$
Cost Rollup For Standard products $$
End


PLAN TO BUILD – DRP/MRP – FUTURE STATE
PLANNING/SALES
DRP
BRANCH PLANT
RELATIONSHIPS
MPF-PRP4 CODE
1- SERVICE PARTS
2- SERVICE ASSEMBLIES
3- EQPT ASSEMBLIES
4-INTRA-PLANT (LABELS)
5- RIVERSIDE GETTING
LAKELAND MAKE PARTS
FOR SERVICES
DCs
MFG
SITES
FORECAST
SAFETYSTOCKS
SALES ORDERS AT
DC
Global DRP
(daily)
INTERBRANCH ST/OT
MESSAAGES
Use Forecast
Generation
(NEW)
Safety Stock
Manual upload;
Use JDE R3425 reports
(NEW)
Sales orders
On hand inventory
Open Purchase
orders
DRP/MRP
GROSS (nightly)
NET CHANGE
(user menu)
Open
Workorders
Review MRP
Pur ord
Messages
Release
Purchase Order
Use consolidation
Release
Blankets from
MRP (NEW)
Review MRP
WO Messages
Release
Work Order
Capacity Planning
(NEW)

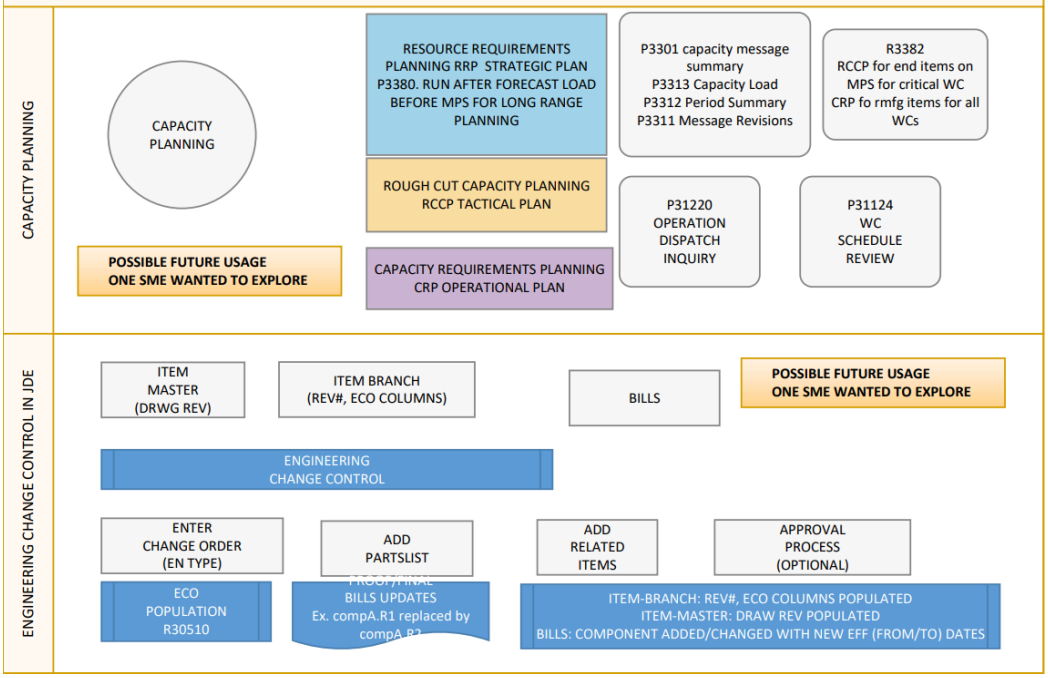
PLAN TO BUILD - WORK ORDERS – FUTURE STATE




PLAN TO BUILD - PDM - ITEMS – FUTURE STATE
Engineering
Start
VAULT/ WINDCHILL SYSTEM ITEMS
CURRENT VARIATIONS
L- Vault No integration & Quick part entry
R- Vault No integration & Quick part entry
M-Windchill, no integration. Excel and cut/paste JDE
S-Vault with integration tailor made.
SN: Windchill integrated
AM: Vault no integration
GOLDEN COMPANY STANDARD GLOBAL LEVEL VAULT/ WINDCHILL INTEGRATION ROLL-OUT
OUTBOUND INTEGRATION
Product Data Management
Quick Part Entry P5541006
Item branch Data Maintenance (Madera:P & R5530200 item audit report)
Explore the usage on all sites
CONTINUE THE CUSTOMIZATION
P5530039 Routing/Notes
P5541009 Item/Notes
P5541007 Notes, etc.


3.Planning Process – FUTURE STATE PAGE 3 NEW MODULES USAGE
DRP
BRANCH PLANT RELATIONSHIPS
MPF-PRP4 CODE
1- SERVICE PARTS
2- SERVICE ASSEMBLIES
3- EQPT ASSEMBLIES
4-INTRA-PLANT (LABELS)
5- RIVERSIDE GETTING LAKELAND MAKE PARTS FOR SERVICES
DCs
MFG SITES
POSSIBLE FUTURE BUSINESS MODEL (SME INDICATED IN ONE SESSION)
FORECAST SAFETYSTOCKS SALES ORDERS AT DC
Global DRP (daily)
Global MRP (daily)
INTERBRANCH ST/ OT MESSAAGES
REGULAR OP/WO MESSAGES
Forecast Generation
ITEM BRANCH DATA F4101/F4102
SALES ORDER DETAILS AND HISTORY F4211/F42119
FORECAST GENERATION
REFRESH ACTUALS R3465
FCST GEN R34650
LAKELAND WANTED TO EXPLORE THIS MODULE FOR SERVICE PARTS
METHODS
-POA-% ACCURACY
-MAD-MEAN ABS DEVIATION
FORECAST SUMMARY F3400
FORECAST DETAIL F3460
WORKFILE F34006
FORECAST PRICES F34007

3.Planning Process – FUTURE STATE PAGE 3 NEW MODULES USAGE



JDE Discrete vs Blend

JDE Manufacturing:

JDE software has many modes of manufacturing: Discrete, Process, Project, Line and Blend. While discrete manufacturing can be adopted in any type of industries, companies do explore using other types of manufacturing applications. It's the change management challenge. Companies using discrete for many decades tend to stick to that type to avoid re-configuring the software and re-training of end users. A strong business driver and top management commitment are needed for this changeover.

Specific examples:

1. Diamond Foods processing walnuts
    a. Discrete manufacturing used. Prototype made on using process manufacturing and blend. They may adopt in certain areas once the peak season is over. The focus was on harvest cost for that year's season.
2. Ventura Foods (Ketchups, additives). Ketchup is not a beverage but still want to explore due to lot tracking needs. Trace/Track was critical in the food industry.
    a. A pilot program was done to a new division. This was in 2013
3. Windsor Food (frozen foods)
    a. A prototype was done. This was in 2012.
    b. The blend module was not that stable product at that time.

Approach:

1. Develop a discovery session to understand the business and process flows
2. Document the current JDE usage and touch points
3. Collect sample business data with simple configurations to complex ones
4. Blend is meant for winery industry predominantly.
5. Prototype in non-production environment
6. Identify business scenarios and conduct show & tell sessions
7. Validate business critical touchpoints in the demo process
8. Identify training needs
9. Sign-off the discovery/proto-type session.

TOP 10 SOLUTIONS TO SOLVE MANUFACTURING ACCOUNTING ISSUES

ERP SOFTWARE: ORACLE'S JD EDWARDS ERP ONEWORLD 9.2 RELEASE
THE CONTENT ARE ADVISORY. PLEASE PROTOTYPE AND CONDUCT TESTING IN YOUR SYSTEMS

#	Business issue	Solution
1	Uncertain variances	Ensure product cost is rolled before Workorder creation. Create a regular schedule of monthly/quarterly cost roll-up exercise
2	Work order with no parent cost	Turn on the soft warning into hard error during WO entry with no parent cost. Create watchlist with zero parent cost other than obsolete items
3	Large, planned variances	Workorders created when you really needed them. MRP WO create messages can be filtered for the lead time window. Also do not attach partslist/routing unless you

		are ready to execute it (in case of ongoing product cost revisions). Use dispatch list and/or capacity planning to simulate the work center load.
4	Large, engineering variances	If you roll up product costs one offs, ensure there are no open workorders. Or wait for the time period when open work orders are closed.
5	Large, actual variances	Monitor and analyze the products & components. If the bills/routing are outdated, get back to engineering to update them during the low manufacturing time period. If the components usage is unpredictable, explore the usage of floor stock (when cost is considered but usage

		is expensed out)
6	Activate WIP revaluation processing option	To balance out the cost distribution

7	Review WIP balances every month, connect back to work order status	Ensure WIP amounts are sitting forever!. Validate operations didn't close WO manually without informing cost accounting. Find a status code like 80 or 82, where operations move it to for unresolved workorders. Finance reviews them monthly and takes it to 95 to 99 processes. No one can manually update the status range 95 to 99. Use Work order activity rules.
8	Inventory and GL out of balance	Use JDE tools on integrity which can be used by operations before they push the work orders to 92 or 95 statuses.

9	Monitor negative Work order issues and Work order completions.	Timing and batch posting are important. Not advised in weighted average cost model environment
10	Monitor components substitution coming from bill of materials and/or manual work during Work order issues/completions	Repetitive usage means there is a disconnect between engineering and procurement. Candidate for cost rollup with new parts in the next cycle. Create a watch list to get consolidated usage data over certain period.

JDE IN CASINO INDUSTRY NOTES 11/13/2020

TVCR went live on JDE E1 9.1 in Nov 2013. Financials, HR/Payroll, Manufacturing and distribution modules. Casino, restaurants, two golf-courses they manage that time.

Project scope

They were using ZJDE versions in the menus so lot of version creation work. Delays in testing CreateForms that time. ESS (employee self-service) was pushed out

Inventory visibility. Cycle count took lot of time between the count generation and the actual count date. All the items were copied into other branches but in reality, many of the items were not inventoried.

Procurement is the key functionality and gave lot of $$ control

Heavy usage on JDE HR and payroll. Garnishment was critical GL, AP used. Quite simple entries in AR. No Fixed assets at that time. No equipment maintenance as well. GL posting and reconciliation was major pain point. 9.1 gave some automated post runs

Processes

End users can create requests (OR) and goes through approvals. Purchasing convert them into OP. DC create

requests and purchasing creates OF type of orders. PO print/email/fax at that time.

Chef enters ST orders, prints and send the doc to make things (example, cake). System auto generated WO for manufacturing. Inventory receives the OT

Chef creates SK order, inventory ship confirm the items for outside locations

Monthly cycle counts. Not able to issue materials during cycle count was the critical production concern.

Bills, routing, work orders, product costing, manufacturing accounting

Uniqueness

Uom and conversions. Primary, production and component uoms were different in the bills. Oracle created ESU to fix the calculations

Pre-flush WO issues used

Mixed mode costing (standard and weighted average)

PO pricing errors when bid date range differs from actual delivery date. Lot of reconciliation. PO pricing, quantity discounts, date range are critical

Shelf like checks on dairy items

Container deposit and amount reconciliation

Non-food items. Freight line addition to the current PO introduced

Event and marketing group would like to monitor the event costs. (not from accounting side)

JDE contract management functionality (training given)

Daily reports on cost, cost verification, negative inventory, restaurant usage

Additional functionality used in this project

PO Generator, enhancements

Purchase rebates

Item exclusion rules for purchase orders

Bids by branch and quantity discounts (supplier catalog; purchase price level). TVCR was paying more since there was no checking on the price discounts. Golf course was paying more for the same item compared to casino.

Sales tax calculation on purchase orders. Manual to system generated

Ability to update components (mass update) instead of manual update for every bills

New features in EnterpriseOne manufacturing

Editor's Note:

JD Edwards' EnterpriseOne manufacturing has built its reputation over the years from its ease of use, flexible configurations and adoption in process/discrete manufacturing environments. As we move into the world of complex global manufacturing and distribution channels, JDE as an ERP platform has helpful functionality built into its core manufacturing suite of applications.

Release 9.0 and above has more features to help manufacturing users to fine-tune their systems and adopt these application across the organization. In this article, Matt Ravikumar takes a look at one of the new features and explains its usage in a manufacturing business environment.

The functionality specified in this article is applicable from JDE EnterpriseOne 9.0 onwards.

Feature : Country of Origin (COO)

Business issue: Scenario 1: In high-tech product industry, products are made in multiple countries/regions. Products could still be made in US to cater to domestic customers and multiple plants could be located in Asian countries to cater rest of the world (ROW). Products made in Asian countries are moved to US in case of increasing domestic demand. Same products made in US and Asian countries are kept in company's or third party warehouses in popular destinations like Netherlands or Singapore for their access to local markets.

The challenge starts when the products are to be tracked for compliance and regulatory controls. Custom authorities at the port of entry in those warehouse centers insist on the country of manufacturing stamp in all the documentation.

Scenario 2: In Reagents chemicals business (example) and especially in European Union market, movements of chemicals are monitored by obtaining a business license for a specific year. Also there are additional value added tax calculations to be executed, if the material originally made in Germany goes to Netherlands for storage/shipping and comes back to German customer.

In both the scenarios there is a business need to store the value of the manufacturing plant (country of origin-manufacturing) and sourcing country (in case of country of origin-source).

From the data input point of view, the country of origin is defined in the item-branch basic data tab and supplemented at the lot processing tab..

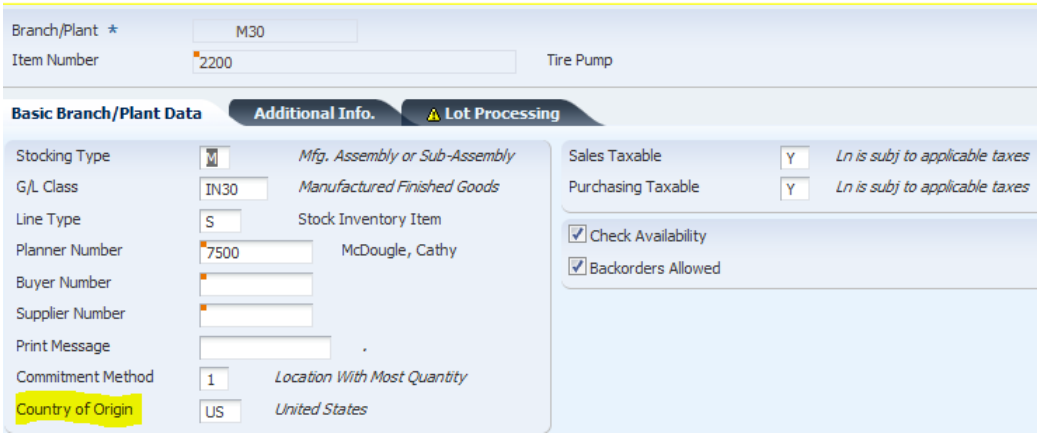


Figure 2. Item Branch application showing country of origin field

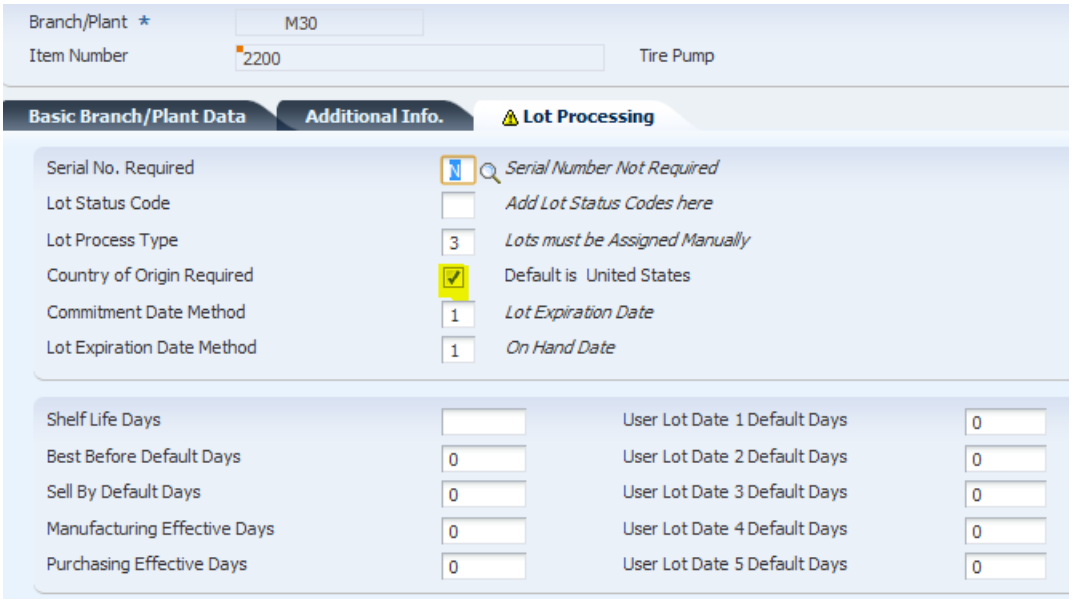


Figure 3. Item Branch application showing country of origin required field

JDE functionality: Country of origin in the item branch (basic tab) and COO required field in item branch (lot processing tab) work in tandem to address the business issue of compliance and reporting.

As a simple UDC (user defined code), you populate your manufacturing and/or sourcing countries in the item branch of the products/components. You can activate this requirement in the lot master tab so that this field is captured in all lot master transactions. This will be helpful in lot forward or backward track/trace applications.

Business impact: The field value is captured at the time of workorder completions (in case of manufactured products) and at the time of purchase order receipts (in case of

purchased items). The field is stored in lot master transactions. The data could be printed in all shipping documents and export documentation. Most importantly, the data is available in lot trace/track applications. Customers using older versions of JDE had made custom changes to bring item master or workorder category codes into item ledger and then reporting from that file. Having this field at the item branch level shows much easier approach and transparent to the business functions from R&D to purchasing/logistics.

Conclusion

Country of Origin is a very effective field in meeting export/import requirements and answering custom authorities on international trade business. We have seen JDE customers making custom code changes in work order and lot control applications. Having this field in item branch level eliminates custom code changes and makes it easy in documentation and reporting needs.

Although this article is intended only as an overview of the basic functionality, we have attempted to provide sufficient details to allow you to perform the setup and execution steps independently.

JD Edwards 9.2 release Upgrades -White Paper MARCH 2025

Document to summarize the activities needed in any JDE release to the current release of 9.2

This is written based on multiple project implementations and experience gained. The regular project requirements like top management support, formal project management office, etc. are not included here. It is assumed that those are the basics in any implementation.

1 Discovery

Discovery does not mean two-day sessions understanding the company and its current JDE configurations. While that could be top level discovery introduction, we need to get into details. Every upgrade comes with customization challenges. There are formal and known customizations, which can be easily identified by looking at P5*/R5* objects. But there are multitude of unknown or undocumented customizations. That would have happened many years back without any formal documentation in any place.

The functional consultants can extract all the P5*/R5* customization objects and review them at the top-level

criteria. This will be kept under a separate list. Power users(s) at the client will organize deep dive into the current software and run through transactions at a non-production environment. The functional consultant will map these to their identified list. A key user from the client side will document the transaction entry and completion. This will help at the later stage to make test scripts. The functional consultant will keep an eye on any new fields or code that differ from standard JDE applications. This is because the end user may or may not be aware of standard JDE functionality vs already customized at their side.

2 Code migration

There are many tools within the JDE software environment for data conversion from the current instance to 9.2 release. However, any customized code needs to be deployed into the development environment for testing and validation first. This is often an underrated effort, and new surprises emerge every week. The objects from discovery sessions need to be scoped out for redundancy and re-use. PM should identify the time and scope of the development work. The technical and functional team will work on the deployment of those customized objects. It is also important to tie the related

objects and reports together. There is no value in testing the Work Order entry customized object if the workorder print form customization is not coming together as one install package. Otherwise, too much time is wasted in going back and forth those results in slow progress. Typically the end users will have limited time since they need to do ongoing production work. Functional consultants will spend more time on unit testing and any internal integrated testing before the code is deployed outside the development environment.

3 Testing

Often underestimated and prone to surprises. The functional consultant should test the code with some real data before the deployment to the testing instance. While formal CRP or UAT sessions are advised for ease of coordination and escalation. But the reality is that the users want flexibility to work on their own timelines and schedules. So the first round of UAT could be independent activity at the user level. They could take some test data and complete their assigned tasks. So this will not be an end-to-end process. And any issues or performance questions should be reported to the functional consultant and PM. It is always the case that other system

integrations are not ready for UAT1. Once those integrations are fixed and working, UAT2 should be at the group level from the end-to-end testing point of view.

4 Cut over to production

No lists and action points are not enough for the smooth cutover. These days, the production system is already ready from system point. A mock data conversion is executed on the production system and all the customized code is deployed. The menus and security are already defined and verified. UAT2 or IST happens in the production box. This helps to streamline security and access issues and/or validate the menu/versions. It also helps with any data conversions issues and to check no unnecessary SQLs are executed. During the go-live date, the data is refreshed back from the previous system.

5 User productivity

Any upgrade takes time and effort, a lot of effort. It is important to focus on the must-have and push the nice-to-have to later date. But that later date never happens. It is best to include UDOs during the upgrade project itself. Even if it requires a lot of retraining end users, it’s worth the cost benefits from the upgrade investments. Simple tools like E1pages, watchlists, Cafe1, grid customization benefit the end-users. This needs to be complex and all-inclusive effort. Small working prototypes will give the user much need little productivity. Depending on the scope and interest, future enhancements can take these forwards into detailed functional coverage.

JDE E1 UAT insights

1. Formal kick-off meetings
   a. Mandatory participation for core-team members, extended team members including power users, super users, etc.
   b. The purpose is to share the overall timeline. And highlight the user's involvement and participation from start to finish.
   c. Educate the process of issue reporting and escalation
   d. Check with user's vacation schedule or any other project commitment before the detailed schedule is drawn. Any other key initiatives at the company level could hinder the progress of the project.
   e. Schedule JDE E1 orientation & overview a week before UAT in multiple sessions where users can sign-in and attend. The look and feel of E1 software are totally different. Different names like

breadcrusts, form exit, row exit, data selection, processing option, data browser, etc. need to be educated. There are tools like UPK which can evaluate the user's knowledge at the end of the training. They may have to re-take the training if they fail in the attempt.

f. Set the expectations. Communicate if there are recent management decisions on pushing certain functionality or features to later phases of the project and not in first-go live. Some examples are orchestrations, UDOs-CAFE1, watchlists, form customizations, OneView analysis.

2 UAT scripts

a. UAT scripts prepared, reviewed, and approved by the power users.

b. The scripts have individual name(s) as responsible person.

c. All interfaces and report outputs listed

d. Ensure unit testing is done first. No object should get pushed into UAT directly without unit testing. The idea is not to exhaust the end-users for repetitive failures, and they lose

enthusiasm for testing.

e. Use SharePoint or Smartsheet tools to consolidate the list and track the progress (with visual graphics)

f. Any gaps found in the scripts should be updated for the next round of testing.

g. If a script takes two hours to execute, plan for four hours. Users may have their regular work to focus and answer emails (or) attend their regular standup meetings. Getting their 100% dedication to UAT is ideal and not realistic. Business distractions happen.

h. Schedule operational scripts (like workorders, planning, purchasing, sales) first and all financial transactions to a later stage. Ensure users document GL batch number in the initial scripts to help the financial users.

i. Identify all exceptions or one-time events (such as negative material issues, unique RMA events, etc.) separately. This may not appear in the regular UAT scripts.

3

4 UAT environment

a. The testing environment data is refreshed a few days ahead of the UAT. This also helps in data conversion exercises

b. All test users' roles and security defined and implemented

c. Power user gets 'Business Analyst' role in case they need to run some process at a higher role if the object security is blocking the process or execution. This is used only for troubleshooting purposes. In production, this role will be removed.

d. Local printers within the conference room in case any reports to be printed (as validation and format checks). This should not be printed on any other departmental printers since it may get sent to customers or vendors by mistake.

e. Package builds during long UAT cycle is inevitable. Schedule late evening hours for the package builds and ensure no time-consuming batches are executed at that time by the users. Users typically execute long-time-running jobs before they leave the workplace.

f. Anticipate system slowness or jobs holding the queues. Create a universal distribution email list to notify all users in the UAT

g. No data refresh during the middle of the UAT since current original UAT transactions are lost.

h. Invoke the scheduler jobs in UAT environment. This may help to check the version issues and any conflict on the run times. Helps in identifying server memory performance.

i. Deploy the latest menu updates. It is advised that users use menu path (instead of fast path) to access programs/reports. This will help in resolving menu/version integrity and also security access. If the user sees unknown program/reports under their menu that means security is opened inadvertently to those roles. And users tend to save their menus as favorites. It is expected that their favorites will get transferred to any new testing environment or to the final production system. Similarly, power/super users will tend to set the custom grids for their departments. These custom grids need to be named correctly and can be

migrated to the production system without the need to configure it again. Custom grids into production system transfer is a one-time event and all ongoing changes need to be done directly in the production system after go-live.

j. Power user should electronically sign the completion of the UAT scripts. All exceptions and remedial actions documented for next phase of testing.

5 Issues reporting

a. Define the process of how end-user will document the error or issues. Issues tracking in SharePoint or other tools. Full explanation documented with screenshots. And assigned to the developer/BAs. Categorize as showstopper or able to move to next steps within that script. Prioritization and escalation of the issues on a daily basis. Many times there are delays because the development resource did not understand the details and he/she not able reproduce the error by themselves.

b. Daily session to share top critical issues

and show the progress of the resolutions.

c. Categorize the issues as 'user-understanding issues,' security, development, deployment errors or process related

d. Document the lessons learned in the UAT. Auditors love that document!

Implementation approach - JDE Enterprise-One applications

High-level Business Benefits

JDE's EnterpriseOne system integrates various business functions in a company and let the business transaction seamlessly flow for the day-to-day operations. Major benefits are

- Better management and control on inventory. As a critical company asset, inventory (both finished goods and raw materials) are tracked at each transaction level, counted thru cycle-count process, and accounted automatically at the time of receipts/issues. More accurate inventory records result in better planning and fulfillment for the company.
- Planning system integrates the product demand (from forecasts or real sales orders) into manufacturing execution process. System eliminates the need for planners having their excel-based sheets to re-work on changing demand or supplies.

- Product recalls. JDE system has trace and track capabilities. The data comes from actual transactions and user need not input any information manually to retrieve trace or track data.

Implementation approach

The following is the suggested approach, when the corporate company's system is JDE and the acquired division or company is merging with the corporate system.

- Form a core team of business leads from Sales, Planning, Manufacturing and Finance. Identify the business sponsor for this project.
- Core team interacts with the JDE SME (subject matter expert) in building a prototype. Proto-type building takes multiple weeks to understand/document the business process and develop a plan to identify/resolve business process issues.
- The prototype is presented to the senior management through a set of critical business scenarios. It is also presented to a wider audience of business users from all the functional departments. The feedback and correction to the prototype are executed.
- Identify the 'power users' SMEs from the business

side. These resources act like single point reference for resolving inter-functional issues and provide hand-holding to the other users. All key system decisions impacting business process are taken by the SME team. They are also involved in detailed user testing when additional (or) new (or) custom-built functionality in JDE is released to the users.

- Project goes through formal process of CRP (conference room pilot), ICRP (integrated conference room pilot), user training, user acceptance training (UAT) before the go-live event. Specific scripts are prepared to walk through the CRP, ICRP and UAT exercises. Sign-offs are required at these events to ensure user involvement and accountability.
- Assumptions:
    - Functional SMEs from Corporate will be available to support and resolve business issues.
    - Corporate IT department resources available for technical support, code changes, and code deployment
    - Corporate training resources and training content can be re-used in the rollout process

- Functional scripts can be re-used in the rollout process.

A very high-level overview of various functional modules in JDE is given below.

Product Data Management (PDM)

- Each Finished Goods (FG) will have a bill of materials (bom) defined in JDE. The bill will be at each case level to start with. Later, we can roll out batch bills if the data is available. Intermediates or sub-assemblies (like bulk, batter, or fills) can have their bills in LB.(pounds). If the sub-assemblies are manufactured ahead of time and sent back to storage for future use in production, a workorder to make them is issued.
- Each Finished Goods will also have routing defined. The labor hour to make the FG is listed here. We can add setup hours, if the line preparation overhead needs to be allocated to the product.
- Each of the manufacturing lines will be treated as workcenters in JDE. Workcenters will have labor $, machine $(if applicable) and fixed/variable overheads.
- Scrap and yield factors are allocated in the bill of

materials. System aggregates the scrap factors in the workorder requirements and also in the manufacturing planning process.

- Bill of materials holds the information whether the component is manually issued (or) back-flushed (or) floor stock item. Examples: water (floor stock), pallets (back-flushed), consumables (floor stock)

Product Costing

- Product costing module in JDE handles the cost simulation and cost freeze of the products. Based on the bill/routing and the standard cost of the purchased item, system rolls up the product cost. User will execute the simulated costs till the bill quantities and routing hours are realistic. Cost freeze will roll up the cost as final, revaluing any existing on-hand inventory.
- Users can simulate annual product cost budgeting by keeping separate annual standards and report management on the cost impact.
- JDE can handle additional cost elements like material handling, landed cost, etc. into the product cost total. This will help in absorbing realistic product costs in the work order manufacturing accounting.

- Standard costing the most popular usage across JDE customers. JDE can handle actual costing, weightage average costing, job costing etc.

Forecasting

- JDE has capability to generate product forecast based on the past sales history and the choice(s) of 14+ different statistical models.
- Till the sales history is available in JDE (through regular sales order shipments), user can manually enter monthly or weekly product forecasts. Another alternative is to load sales history into JDE before go-live and run the sales forecast generation.
- Forecasted products will be at the same unit of measure as 'primary unit of measure.' (Example: 0704220- poultry patty -3oz, primary uom is EA)
- Marketing or demand planning function owns the forecast data. If the originally agreed forecast data need to be modified due to plant constraints or market feedback, adjustment forecasts are entered using different forecast type. This will help to monitor the forecast accuracy for management reviews.
-

Manufacturing Resource Planning (MRP)

- JDE adheres to the APICS terminologies on the Distribution resource planning and/or manufacturing resource planning.
- MRP consolidates all the forecast and/or actual sales orders in the DCs (distribution centers) to the relevant manufacturing plant. This process is known as transfer orders. Branch relationships define what products are maintained in the DCs and the flow of manufacturing/distribution. These relationships can be modified any time to suit the market demands and availability of manufacturing capacity.
- Safety stocks for the finished goods are identified at the DCs. Each manufacturing plant can also have their safety stock controls. DRP/MRP includes this demand besides the forecast and/or customer demands.
- Each manufacturing plant then gets the MRP message to 'make' the finished goods based on the external demand. This is called manufacturing workorders. MRP message also explodes the bill of materials and generates purchase order messages for

the bought-out materials.

- Planners or buyers, based on their roles, process the MRP messages into firm orders.
- The actual execution of MRP engine is decided after business process reviews. Most of the JDE clients run their MRP batch every day early in the morning, at the minimum. This factor is dependent on the type of industry and demand variance in the marketplace.

Workorders

- JDE's shop floor management handles the manufacturing process through work orders.
- Workorders can be entered manually (or) processed from MRP message application. Typically, the master scheduler(s) enter/maintain the finished goods' schedule thru' workorders.
- Planners at the plant level generate workorders for sub-assemblies or WIP items.
- User will then print WO, which is a process of attaching partslist (from the bill) and routing (from routing master). JDE will hard-commit the materials against this workorder in the inventory system.
- JDE generates a workorder outputs (1) WO traveler (or) multi-level partslist (2) WO summary – listing of all orders for the manufacturing line (3) shortage list – list of known shortages for the workorders. This is communicated to the plant supervisors by email or hardcopy outputs. The output can show routing instruction, which can include specific manufacturing instructions for that product.
- WO completion can happen thru DSI or any third-

party scans. User can manually enter completions. JDE has multiple of ways of handling this transactions

- Super back flush, where material and labor are accounted at standards
- Back flush, where material is accounted at standards. Labor need to be entered at actuals.
- Manually entering completions. Reporting materials issues and labor usage also manually.

Business decision is made on the best choice of using one of the above, based on the plant level specific business needs.

- JDE can handle discreet and process manufacturing. Discreet manufacturing is easy to use and adopted quickly in a typical implementation. Products having by-products in the manufacturing process go through the process manufacturing mode. Line or cell manufacturing, kanban functionality, etc. are also available.

Manufacturing Accounting

- After work order completion, the orders are not yet closed. Cost accountants take over the control of the work orders and process the orders through manufacturing accounting.
- Manufacturing accounting batch jobs creates GL entries for the inventory transactions. This can be run in proof and final mode.
- Next step is the variance accounting, where the different between standard & actuals are booked under variance journal entries. This can be run in proof and final mode.

Inventory Management

- Inventory system maintains the cardex records, ledger. JDE has expiry date (based on the shelf life of the item), sell-before date and best-before date capabilities.
- Inventory adjustments, transfers, issues are transacted under the inventory module
- JDE can help users to conduct physical inventory check through cycle counting. System keeps tracking count date(s) and prompts for the next check based on

the defined cycle frequency.

- JDE can allow on-hand inventory to go negative (this is the management discussion point). However, these negatives need to adjusted back to zero to avoid
- Item master/ item branch in JDE holds the information of whether the item is made or bought, lot control days, ABC category codes, and commitment methods for sales orders.

Purchasing and receiving

- Purchase order can be entered manually (or) converted directly from MRP messaged.
- JDE can be configured to handle purchase orders different for stock items, service items, misc. items through a set of order activity rules.
- Blanket orders will help to release long-term contracts to vendors and release purchase orders to finalize the delivery dates.
- Stock purchase order received by logistics function. Three-way matching is enabled to track purchase order usage, receipt matching, and invoice matching.

- Receiving automatically updates the inventory records and update Accounts payables for vendor payment processing.

Sales order processing and shipping

- JDE can generate a customer quote based on the customer setup and pricing setup. The quote can be converted into a regular sales order later
- Customer orders can be entered manually (or) processed through EDI process. Customer order becomes the first level of demand for the company. The request date, quantity required and the correct product number are maintained by the customer service representative (CSR). System hard-commit the inventory at the DC, which can be overwritten by CSR in the specific sales order. Hard-commit reserves the particular item/lot to the customer demand
- JDE enables multiple ways of handling/processing sales orders for certain type of markets, customer group, internal or external orders, etc. through a set of order activity rules. (Example: military orders, major customers, sample orders, credit orders). This brings a

tremendous flexibility to the order processing without making software code changes.

- Sales orders go through pick/pack/ship-confirm/shipping process and this can be configured for each of the order type.
- Order shipping relieves the on-hand inventory and releases any previous commitments
- In JDE, orders go through the end-of-day sales update process to generate accounting transactions (Accounts receivable, general ledger).

Quality

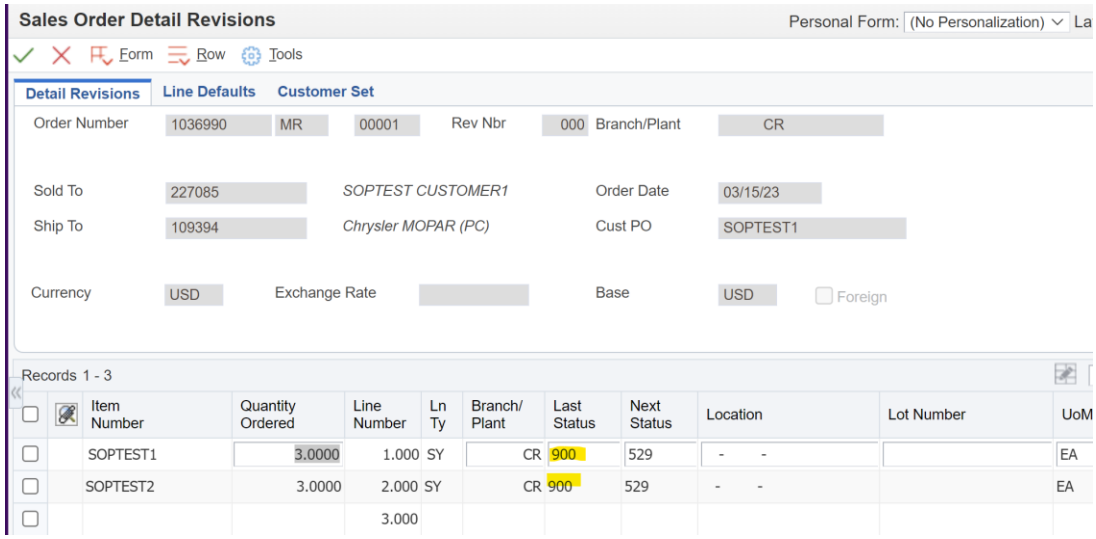
- JDE has power full lot control functionality. Lot control is configured at each item level and for each branch. System can make it mandatory to enter the lot number at the time of purchase order receipts (or) workorder completion.
- Using the lot control, user can inquiry forward or backward the usage of particular item/lot in the manufacturing and distribution of the finished goods. This tool is very important for quality compliance, company's product recalls, vendor product's recalls, etc.
- Products (or) materials can be placed on quality hold by authorized users. System takes away these quantities from its availability, and yet still show as on-hand.

- Planning system can be configured to re-plan supplies for certain types of hold codes.
- System follows FIFO using the lot expiry dates. System has tools to place item/lot on hold automatically if the item pass the expiry date.
- Shop floor user cannot allocate or use an inventory which is on hold.

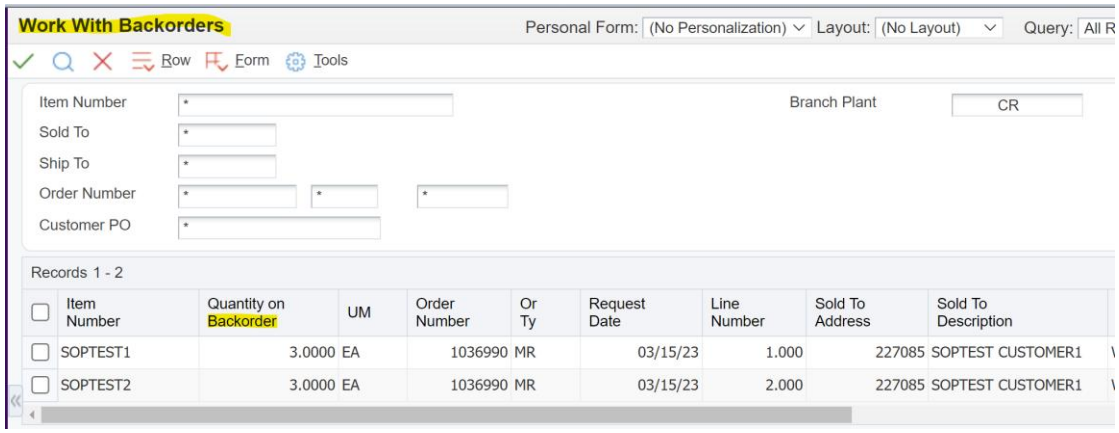
JDE Discovery - Published March 2023

Functional Area	Manufacturing
Industry	Heavy equipment manufacturer
Scope	Discovery phase to 9.2
Description	Explore the 9.2 functionality for business usage. Moving from 9.1
Modules	Sales orders
Complexity	Lots of opportunity to automate the business transaction, manual printing, and interface to external systems.
Plus Points	Lean IT team. Power users drive the initiatives

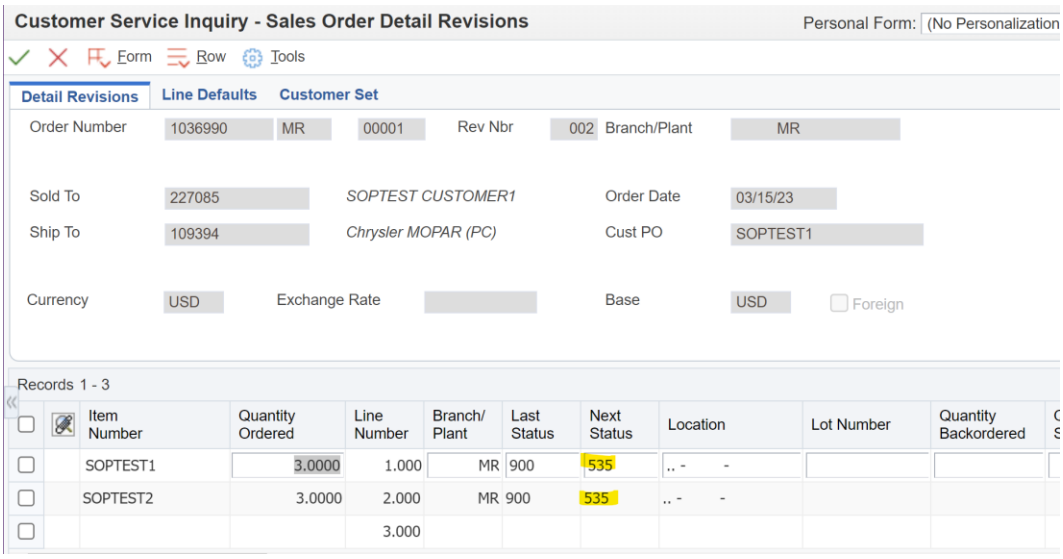
SO1 EnterpriseOne Backorder release process (currently done manually)



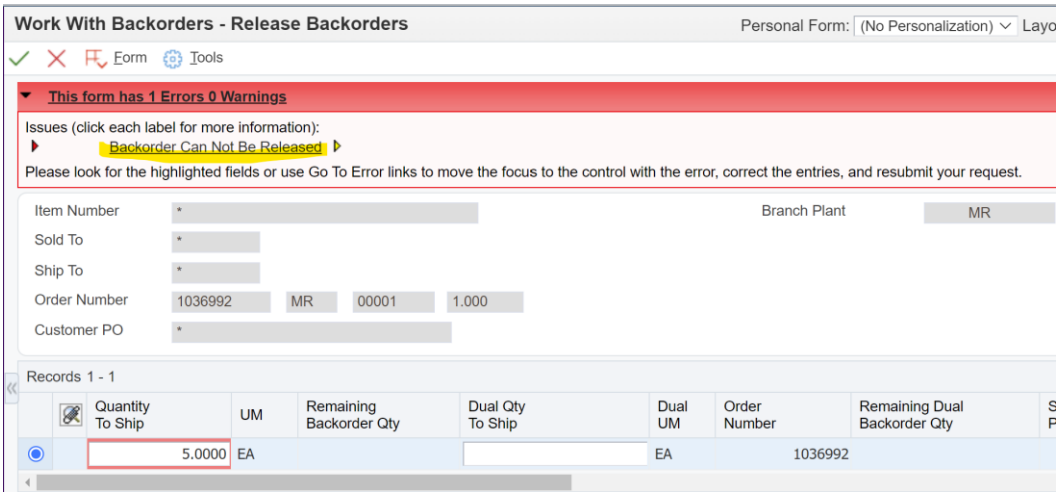
When the order is entered, lines get status of 900-529 if there is no inventory. 529 is the new status introduced for backorder processing.



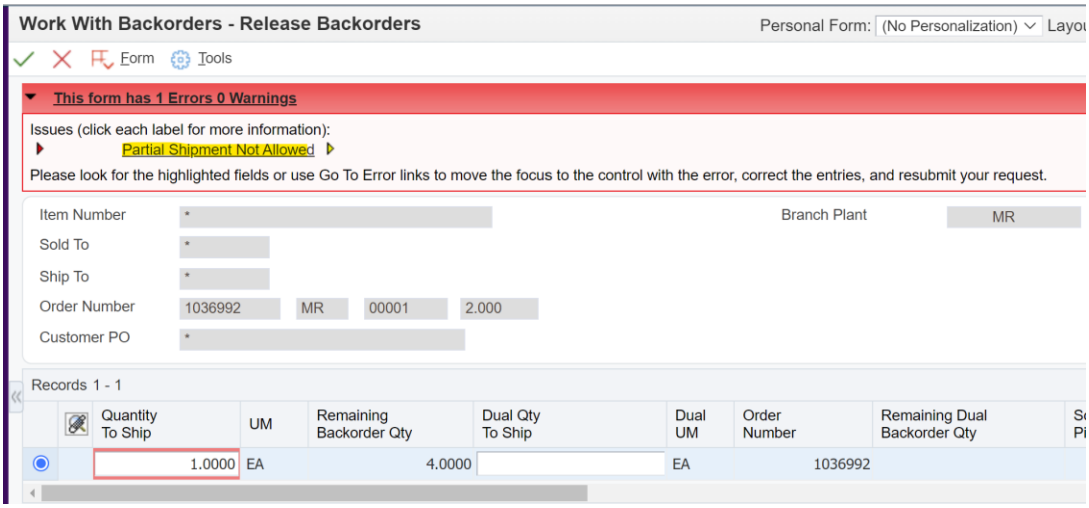
This order goes into backorder release application. For manual backorder release



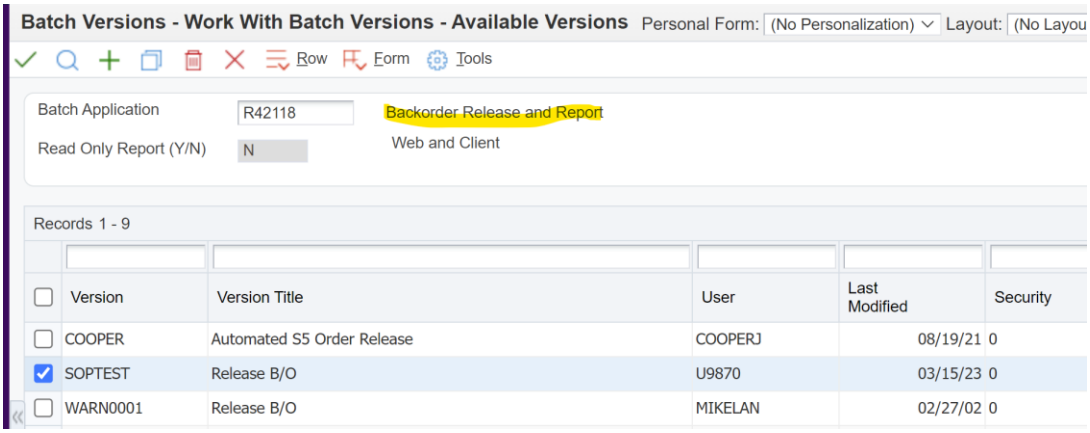
After back order release next status gets updated to 535



If you release line in backorder release, system gives error when there is no inventory available

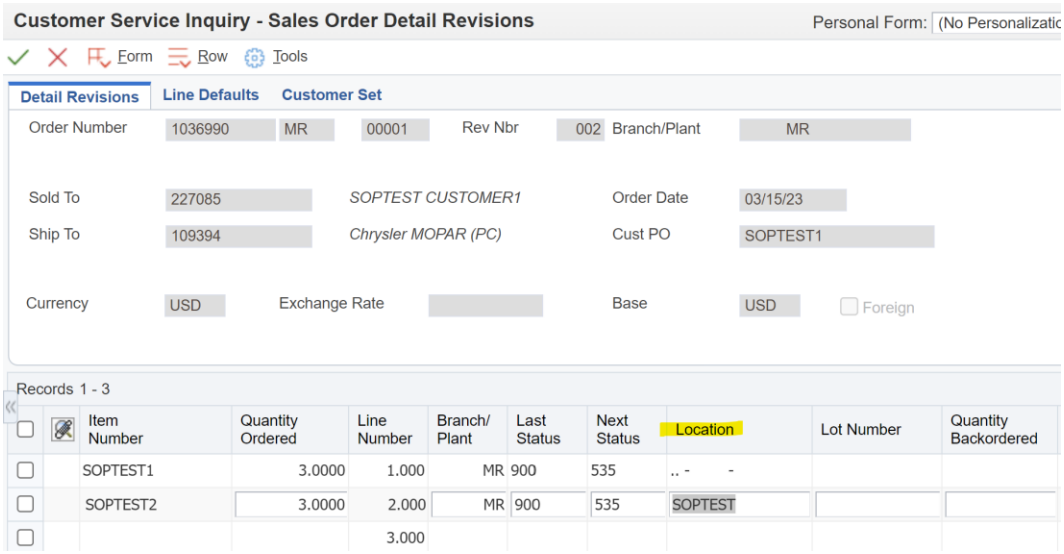


If you release partial line in backorder release, system gives error when partials are turned OFF in the customer master billing instructions



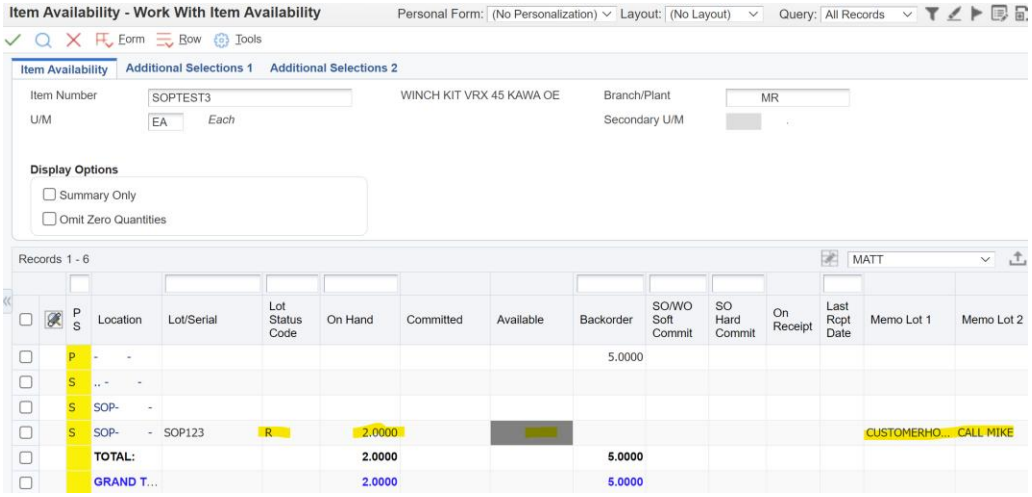
We can also release backorders in a batch, which could run like every hour in scheduler mode.

SO2 Use Sales soft and hard commit for certain order types (Currently this feature is not used)

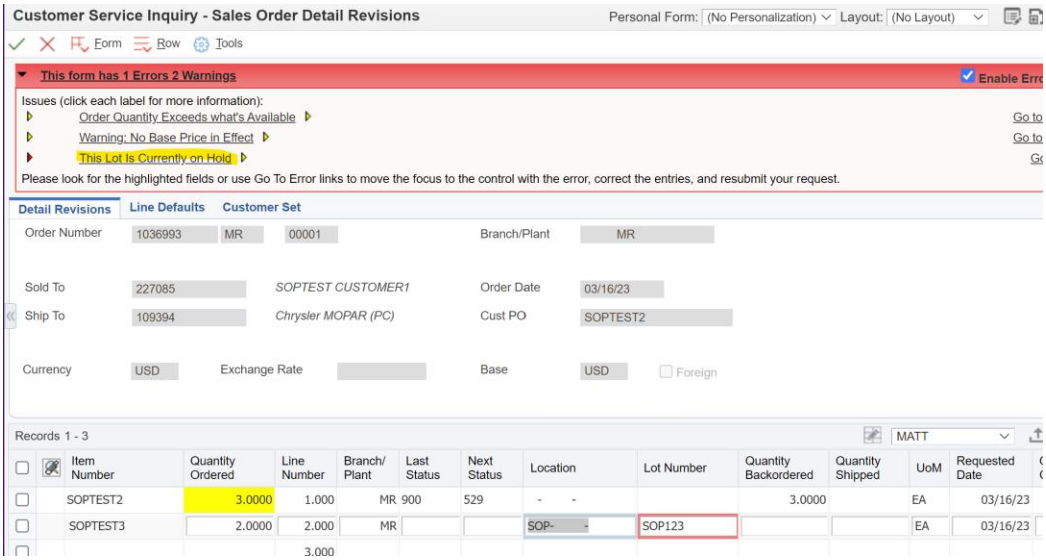


Example of hard committing inventory location/lot to a sales order line.

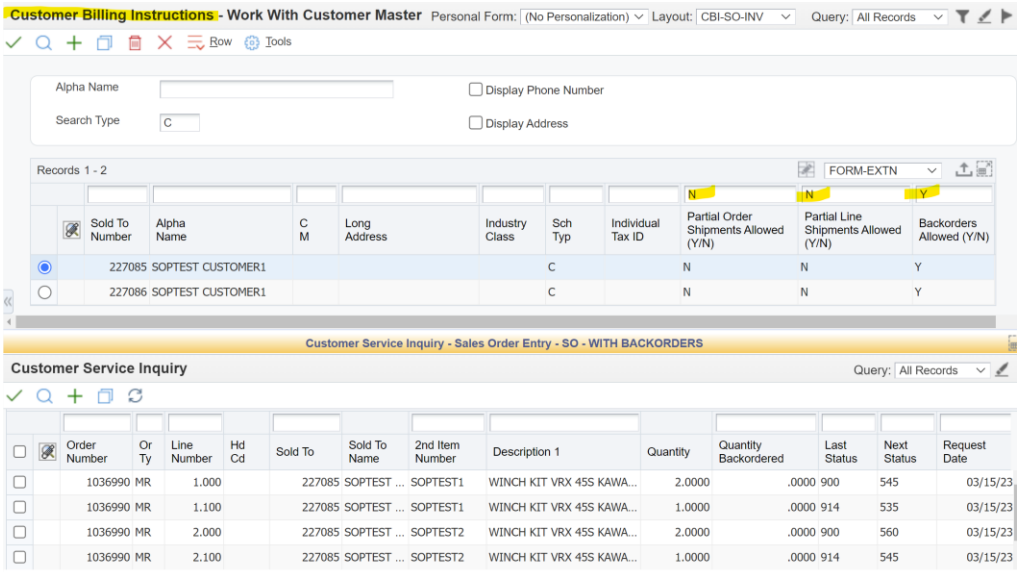
SO3 Ship complete, automation. Review the item/customer hierarchy where order lines need to be shipped together. Explore how other parts that are already available go into some sort of reservation to prevent being used-up by other customer orders.



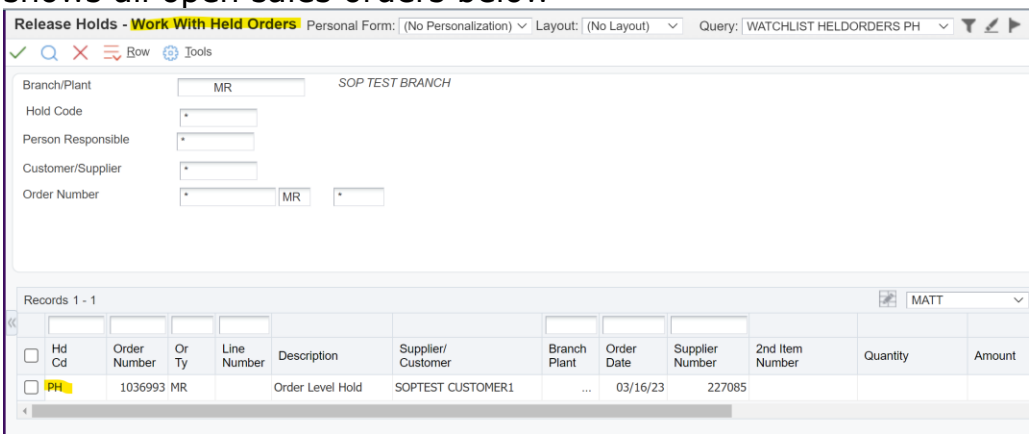
Customer reservation using item/loc/lot hold code. Example here is 'R' hold code with memo lot descriptions being used. This inventory is not available for use



When customer service picks the hold item/loc/lot, system gives error.

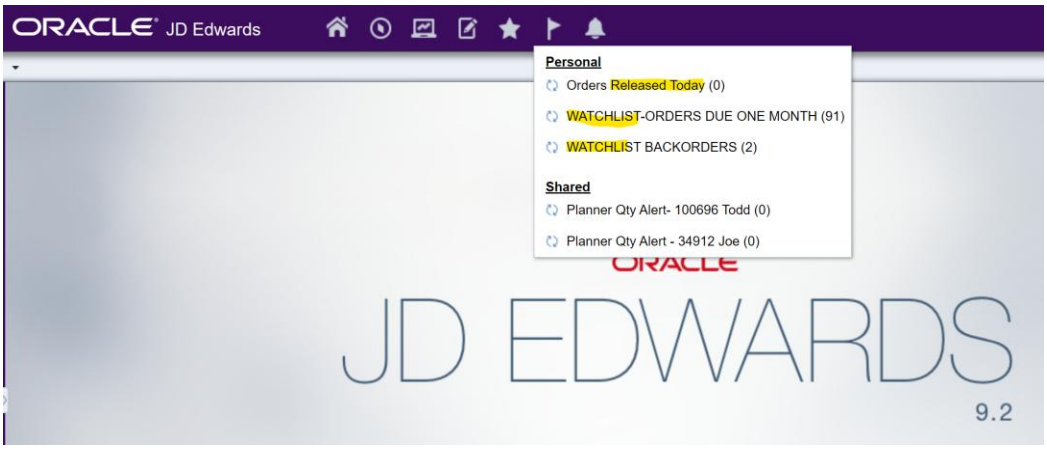


Cafe1 view of all customers that require ship-complete (no partial order, no partial line). Grid shows all open sales orders below

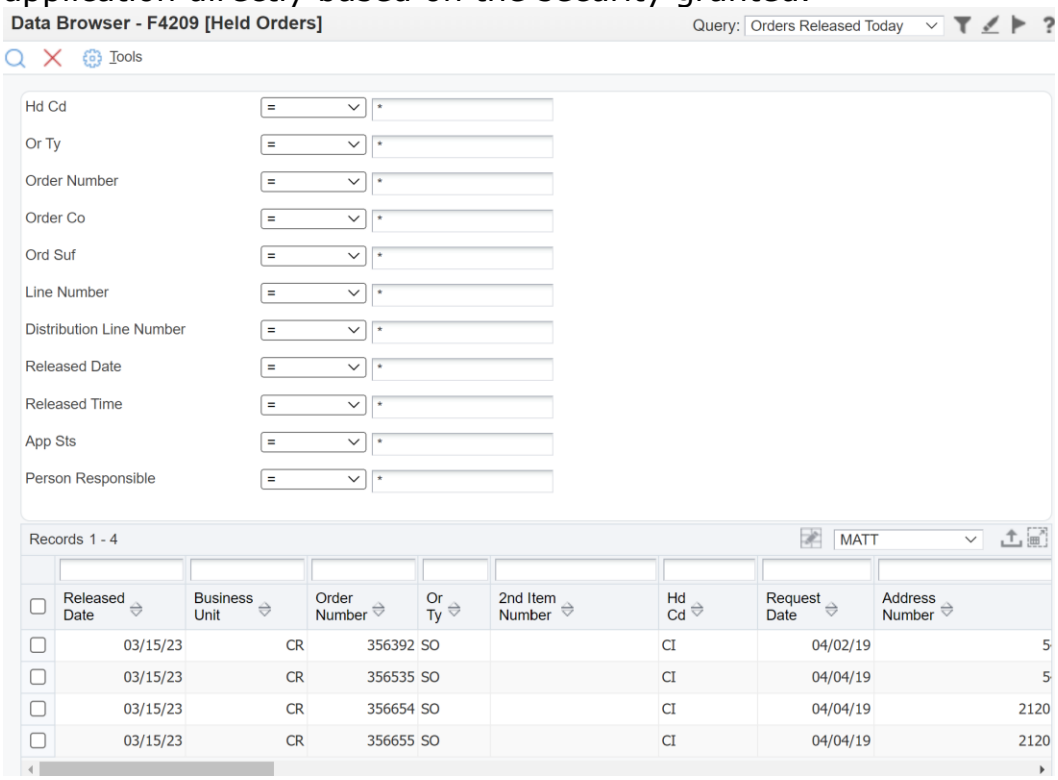


System can put SO order hold PH automatically when there is no inventory for partial line/partial order. User reviews this held orders and make inventory available before releasing PH hold.

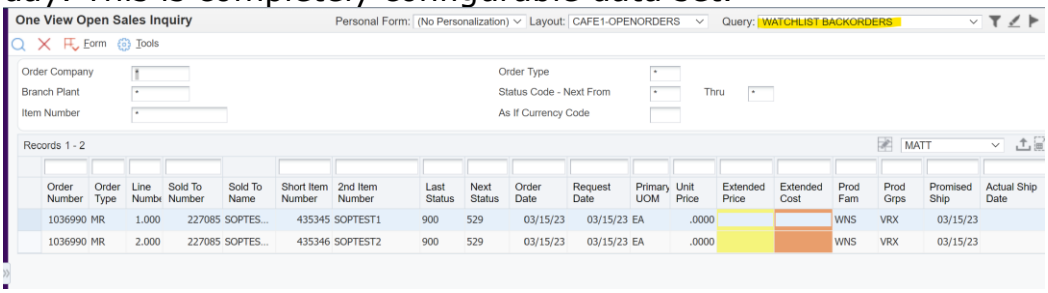
SO4 (TT1) Automatic communication when SO credit hold is released on past due sales orders. Review/training on Watchlist functionality



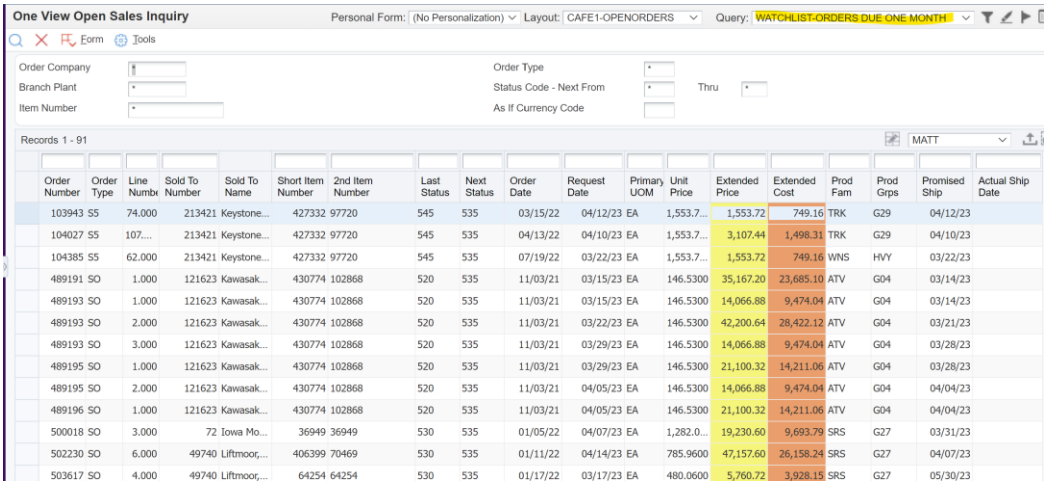
Watchlist created by users are shown under personal folder till they are deployed by IT
Order released today is a watch list on databrowser. The watch list shows the count alert.
Users need to open databrowser and open the query to get the details. This is the current limitation on databrowser watchlists. On other watchlists, the click will open the application directly based on the security granted.



Data browser showing the orders released that day. This is completely configurable data set.

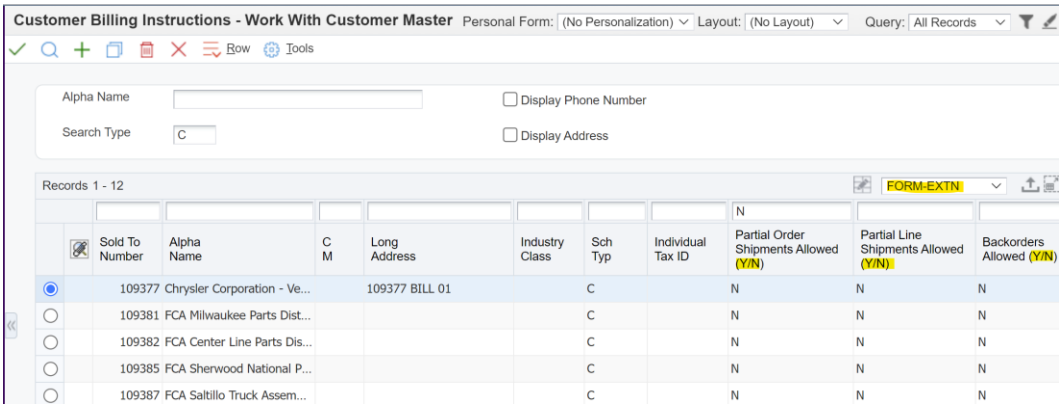


Another watchlist showing list of backorders

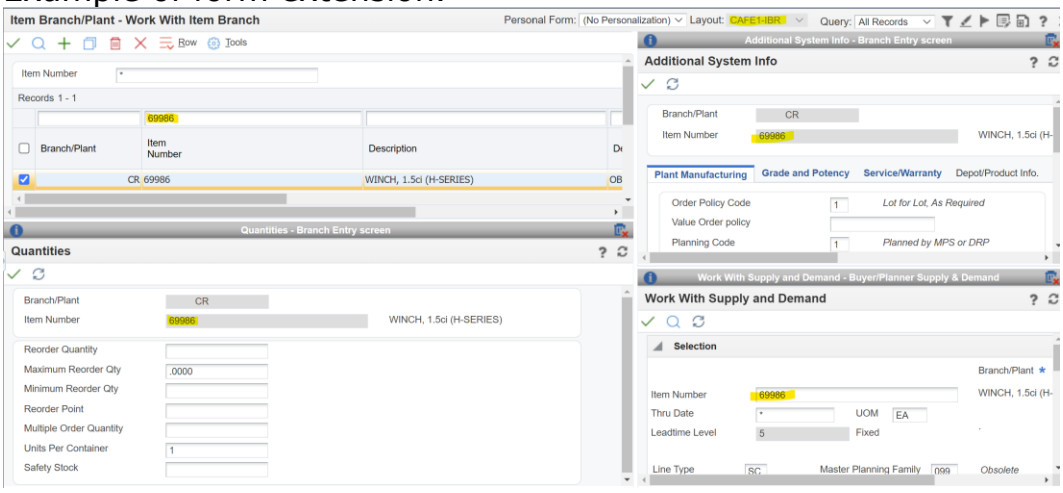


Watchlist showing orders due next 30 days. You can build the query based on price/cost level (or) use cat codes to show exceptions

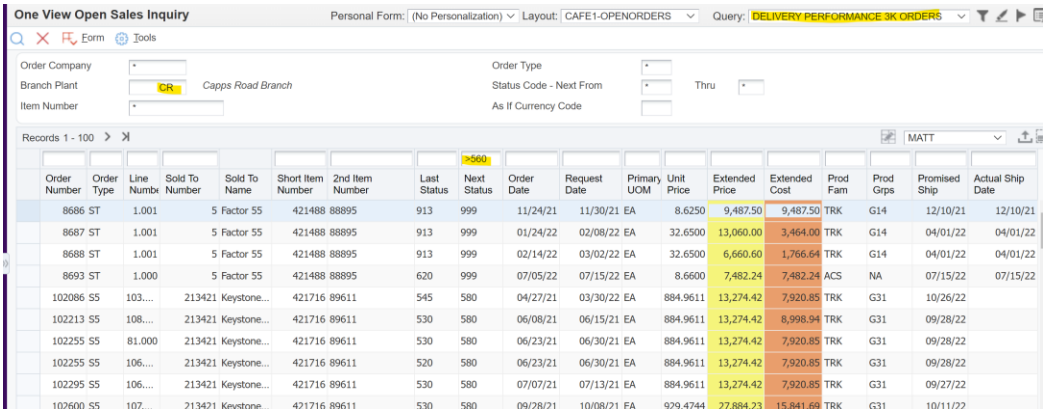
SO5 S&OP. Make monthly meeting more productive. Use EnterpriseOne functionality for better business planning. Education and mentoring to improve use of EnterpriseOne tools for single source of truth

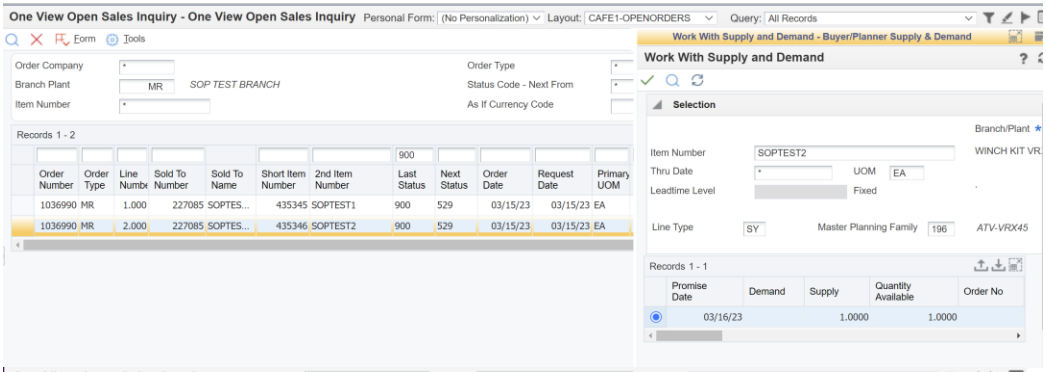


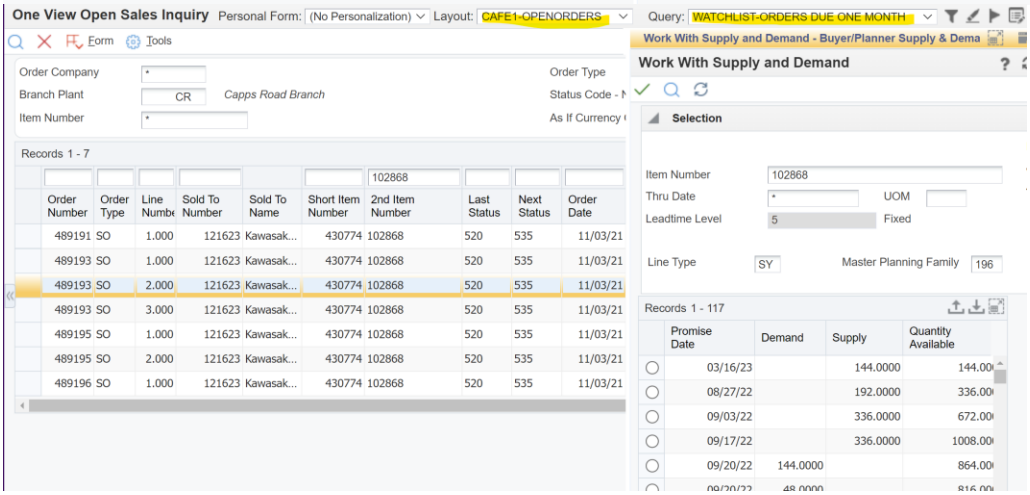
Example of form extension.



Cafe1 in item branch



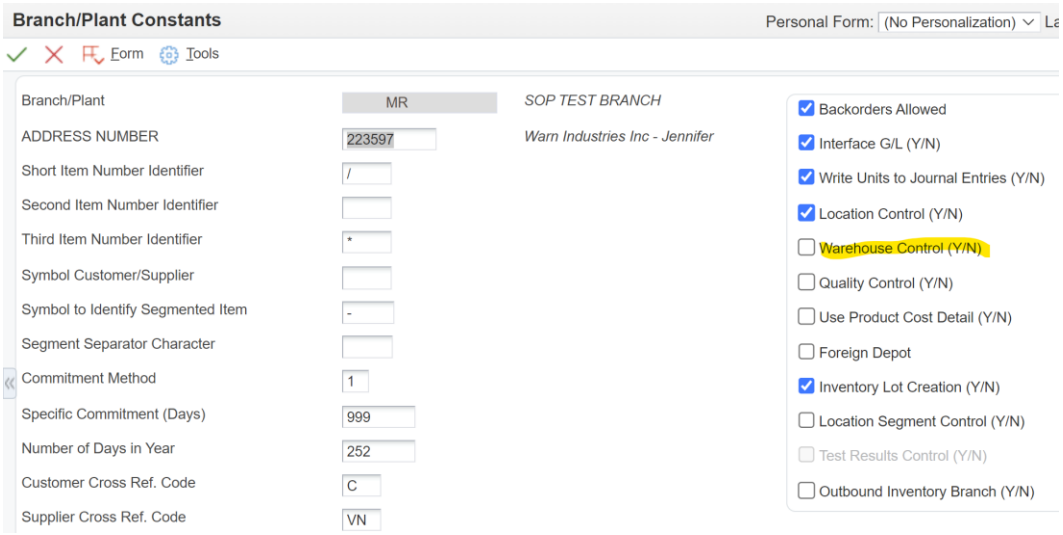




Cafe1 on open sales inquiry

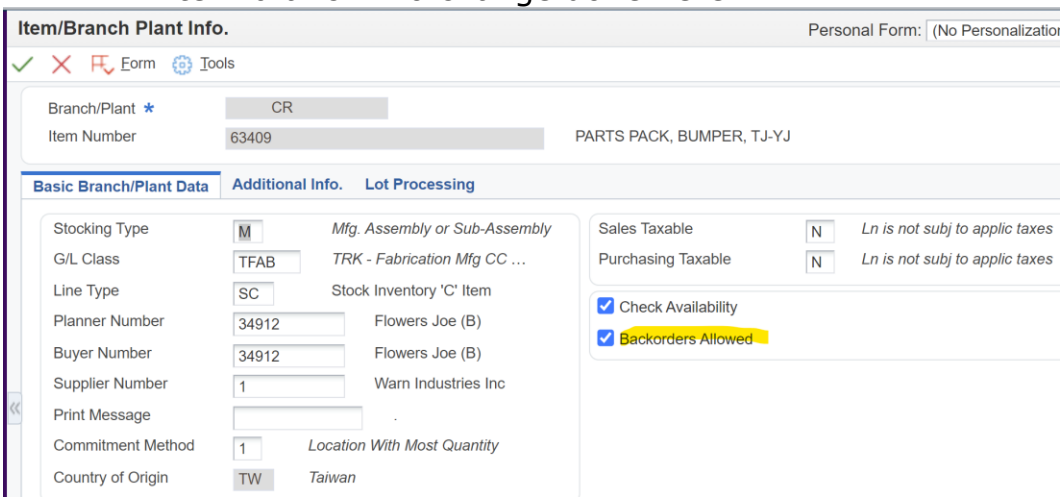
DV CONFIGURATIONS IMPACTED

1 BP constant

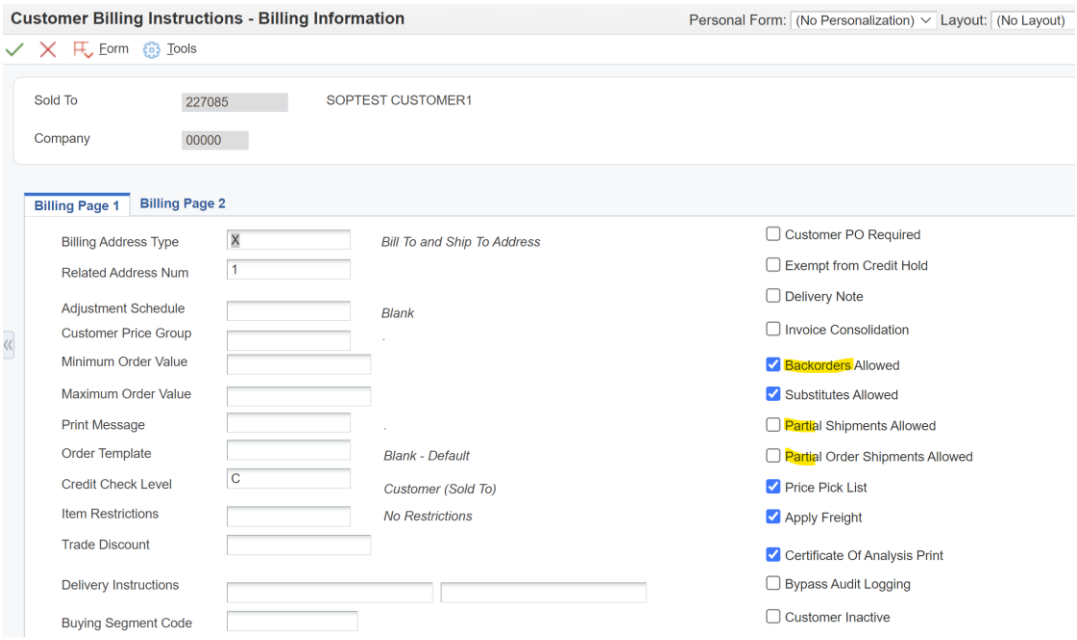


W/H control disabled for this demo branch to avoid inventory adjustment errors

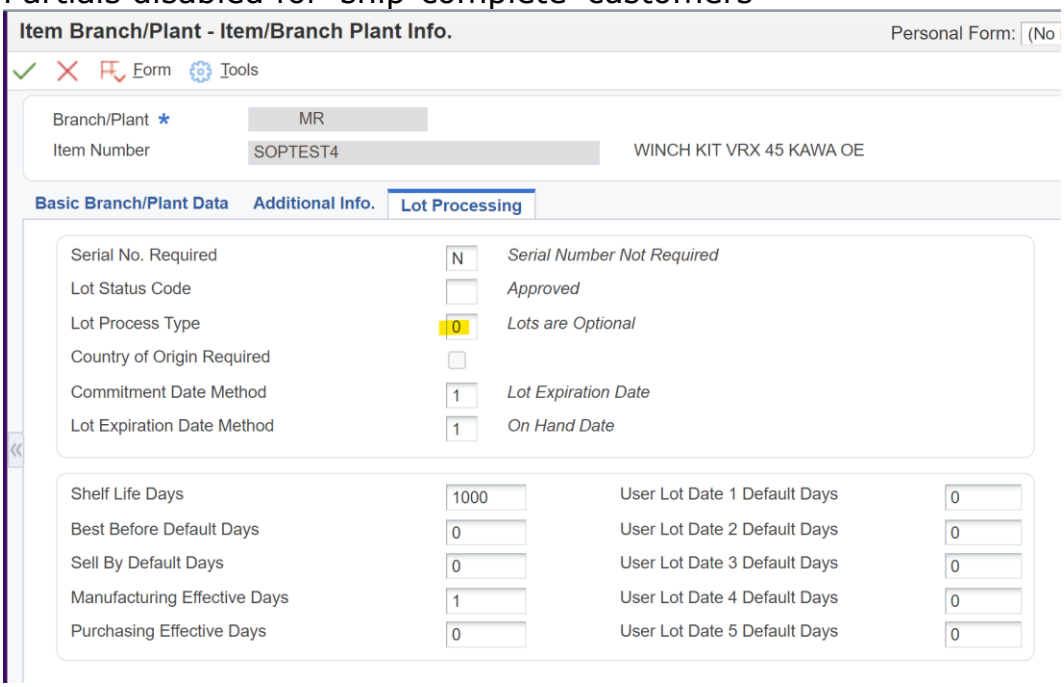
2 Item branch. No change done here.



3 Customer billing instructions. Backorder enabled. Partials disabled



Partials disabled for ‘ship-complete’ customers



R5642520 SOPTEST VERSION: HARDCOMMITT TURNED ON

Processing Options

Edits | Display | Process | Currency | Versions | WARN

1. Hard Commit Inventory: 1

1 = Hard commit inventory
2 = Bypass commitment process

2. Preference Commit: 1

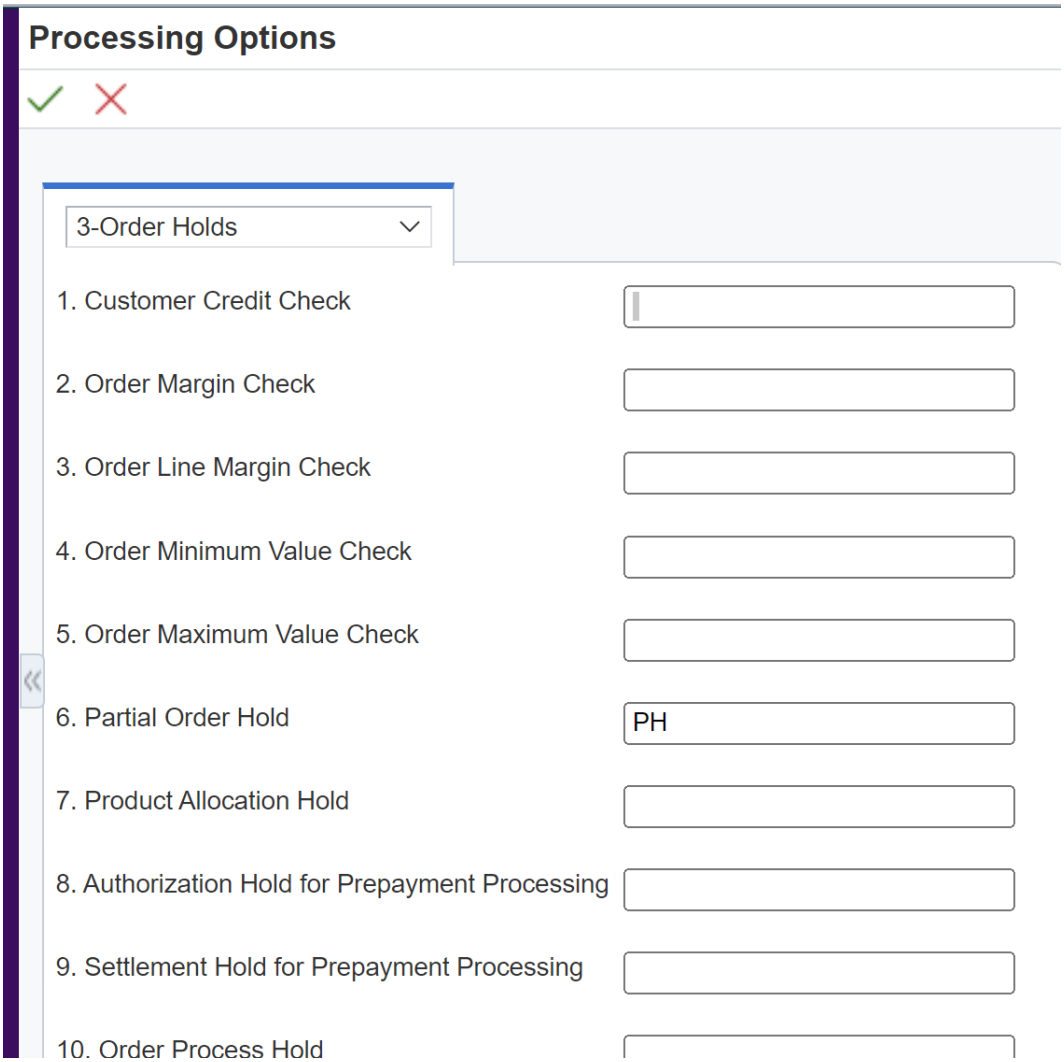
Blank = Bypass commitment processing
1 = Use preferences to commit

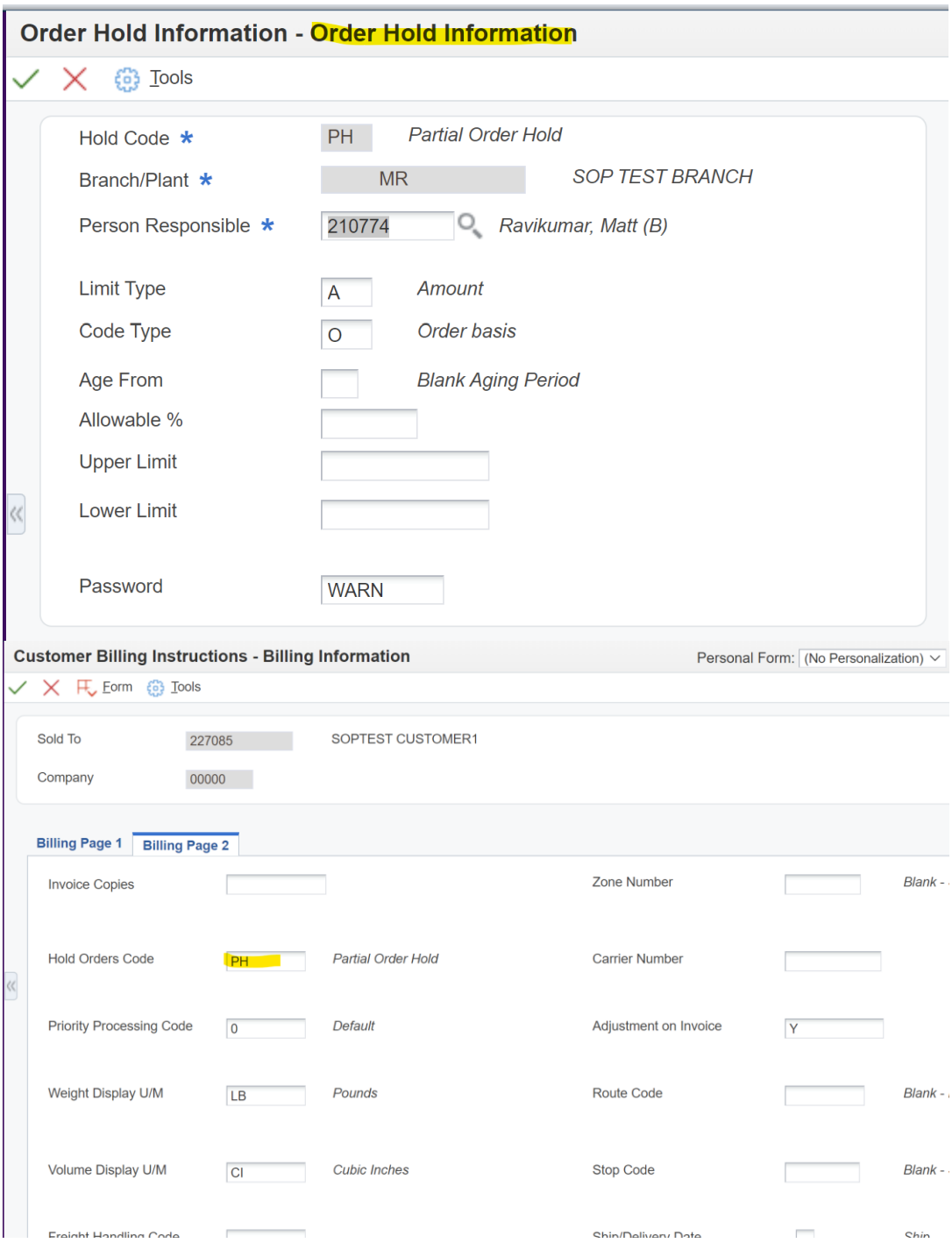
3. Create Work File:

Blank = Do not create a work file
1 = Create a work file

4. Ship and Debit Processing:

Blank = Do not call R45100
1 = Subsystem Mode
2 = Batch Mode


Processing Options
3-Order Holds
1. Customer Credit Check
2. Order Margin Check
3. Order Line Margin Check
4. Order Minimum Value Check
5. Order Maximum Value Check
6. Partial Order Hold
PH
7. Product Allocation Hold
8. Authorization Hold for Prepayment Processing
9. Settlement Hold for Prepayment Processing
10. Order Process Hold


Order Hold Information - Order Hold Information
Tools
Hold Code *
PH
Partial Order Hold
Branch/Plant *
MR
SOP TEST BRANCH
Person Responsible *
210774
Ravikumar, Matt (B)
Limit Type
A
Amount
Code Type
O
Order basis
Age From
Blank Aging Period
Allowable %
Upper Limit
Lower Limit
Password
WARN
Customer Billing Instructions - Billing Information
Personal Form: (No Personalization)
Form
Tools
Sold To
227085
SOPTEST CUSTOMER1
Company
00000
Billing Page 1
Billing Page 2
Invoice Copies
Zone Number
Blank -
Hold Orders Code
PH
Partial Order Hold
Carrier Number
Priority Processing Code
0
Default
Adjustment on Invoice
Y
Weight Display U/M
LB
Pounds
Route Code
Blank -
Volume Display U/M
CI
Cubic Inches
Stop Code
Blank -

Best practices for successful JDE implementation

Editor's Note:

The software industry has seen increasing demand for JDE projects in 2023 (which will increase more in 2024) due to companies moving from world to Enterprise one, XE to version 9.x and adding more functionality in their current system footprint. One of the favorite questions in customer forums and Collaborate meeting rooms is: what the best way is to quickly implement JDE system. JD Edwards' has attained the mindshare among the C-level executives that it is easy to implement and much easier to reconfigure as well. However, the middle management is confused by various system integrators on project models and methodologies. Companies are increasingly interested in showing that they are the early adopters of technology and take that as a competitive advantage. Same interest is also shown in project methodologies and adopting best practices in software implementation.

Do we need a big-name system integrator? Do we need a PMO (project management office) and a pool of project

managers equipped with project control software tools? Do we need an executive sponsor, steering team, and a core team? Who are the best candidates for power users?

In this article, Matt Ravikumar looks at some of the basic framework needed to achieve success in any JDE implementation.

Criteria 1: Project Structure

For every major project, there should be an executive sponsor (typically from the business side) who has the authority to decide on the budget and timelines. There will be a steering committee of key functional heads, with their stakes in the project's success. Then the core team of power users, business leads, senior business analysts, development managers, technology managers, infrastructure managers, etc. In large organizations there is an extended team, where members are included as needed basis. An organization chart is prepared and communicated for each major project.

Simple steps like publishing the project details on the company intranet or SharePoint site, having a dedicated email distribution list, frequent and informal group gathering without any specific agenda, etc. will go a long way in the visibility of the project across the organization.

Criteria 2: Executive involvement

This criterion is about when to meet and its frequency. There are companies where steering committee meets more often than the core team! This results in reviewing the same project status again and again. People lose interest and then start delegating the meeting invites! The meeting frequency is a subjective discussion and is based on the company's working style. At the minimum, the core team should meet weekly and steering committee on a monthly basis. The idea is to give momentum whenever there is a slack and not to kick boredom in those meetings.

Another reason for executive involvement is to prioritize various projects that are running concurrently in the company. We have seen resources accepting training calendar but asked to work on other initiatives on that

week! It could be their annual performance review training session, HR re-orientation events, and leadership or management training programs. These are far away from software training/testing and users likely to give priority to them.

Criteria 3: Scenarios and more scenarios

Successful projects show that the scope was maintained and communicated at various levels. The best way to maintain the scope is to identify the business scenarios upfront and review them again at periodic implementation stages. The high-level scenarios may stay intact since those are formed from the known business issues. The detailed scenarios will go through changes after power users in that function go through the details and make modifications. Again, scenarios are a powerful way of communicating the changes happening and demonstrate how we are testing & deploying them.

The steering committee may just review the high-level scenarios and how the system design has been evolved to address them. Core team will get into the next level of details such as configurations, customization, and reporting.

In a large project, each of the business scenarios are split into detailed sub-scenarios and then into testing scripts. A traceability matrix of connecting the test scripts to top-level scenarios will help to prove the top management that sufficient effort has been spent into the details.

Criteria 4: User involvement

A lot of surprises wait in this area for any JDE implementations. The complaints from the users are, they have to do their day-to-day work, the expectations are ever changing, no sufficient training, their pet-peeves are not addressed, etc. The power user or functional head is the champion to address resource conflicts, user availability and signing off their training needs/completions.

Many traditional projects keep the user training just weeks before go-live. This brings a lot of surprises when the actual user communicates how exactly they handle the

transactions, which is completely different from the original assumptions. The best strategy to avoid these types of conflicts is to train the users just after CRP as a first round of training. Convert the CRP test scripts as UAT scripts (user acceptance testing) just weeks before go-live and ask the users to execute them. UAT acts like an on-hand training and it has shown tremendous reduction in support calls after go-live!

Signoffs: For every training event, whether it is one hour overview or a day-long training, there should be a simple sign-off sheet. In large organizations, the department wide sign-off sheet should be compiled and sent to the department head. This will proactively involve senior executives and they can in turn dedicate additional project resources and/or re-allocate the project resources! Lastly, this will avoid users complaining just before go-live that they have not been adequately trained to handle the new business system.

Criteria 5: System environment

This area looks simple and easy but gets into complications and business sensitive if something goes wrong! In the large project, a dedicated QA environment is a must with longer data refresh cycle. Besides the DV environment, a PY (prototype) environment will help in day-to-day production fixes. All the code to PD deployment must go from QA. Code freeze on production fixes during project go-live will help a long way to avoid small user level changes impacting wider functional transaction. This is especially critical if a new division or acquired company is going live on JDE on an existing system environment.

Another mitigation strategy is to schedule multiple rounds of CRP and ICRP (integrated CRP) and look for any transaction exceptions due to production code changes. Sometimes it may be advised to do code refresh from PD to QA for a multi-year rollout projects.

If the company has integrated environment with multiple software interface (like PDM, bar-code scanners, time entry, etc.), one of the non-production environments should completely mimic the production system. One can never underestimate the impact of small code changes in software

in the matrix of interfaces. The technology manager should insist of specific testing scenarios which process data from ERP to other interfaces whether as an in-bound or as an out-bound processor.

Conclusion

Companies start ERP projects with a textbook based project planning approach and then modify mid-stream to suit their operating culture and procedures. This paper highlights some of the key areas to be kept in mind even if there is a completely customized implementation approach!

Implementing JDE system truly reflects the culture of the organization and how people respond to business challenges by adopting their systems. We have seen teams implementing JDE system get nominated in other initiatives like S&OP (sales and operations planning), IBP (integrated business planning), Six Sigma, and other regional business process improvement initiatives. The confidence and knowledge gained by these resources is an important asset to the organization. Companies identify and motivate these resources so that they are ready for the next round business challenges!

It's just a technical upgrade! Mfg Functional notes from XE & 9.1 to 9.2

Whitepaper
Sep 2019

Getting Started. 9.1 to 9.2

The purpose of this whitepaper is to explain the uniqueness of the JDE manufacturing modules implementation and share the lessons learned during the projects. The document explains the major challenges faced in the upgrade project to 9.2 Release.

Typically, the upgrades are treated as simple technical upgrade. The challenges start during CRP where change management becomes a major factor. Any simple understanding error in environment installation pose time delays and multiple layers of testing.

The implementation started in April 2019 and got completed in mid-September 2019. Manufacturing modules includes PDM, planning (MRP), shop floor management, product costing & manufacturing accounting. Weekly Forecasts with forecast consumption used. DRP/MRP runs twice a day for the seven manufacturing facilities. Product cost-roll happens once a month. Workorders are closed at the end of the month for better financial reporting and closure.

Major business benefits

- This client in the beverage industry want to make use of the 9.2 functionality and tools. They want more user involvement by using watchlists, cafe1 and common grids.

- From previous XE to 9.1 upgrades lot of redundant customized codes got moved into 9.1 system. The upgrade was an opportunity to review the customization and remove the un-used ones.

Key STATISTICS (DATA IN JDE)
Branch Plants: 7
Item Records per branch:40000.
Item master: 102000(N-4700)
Bill of materials (at cutover)
--Total Records: 250000
Routing (at cutover)
-Total Records: 22000
Workcenters: few per branch. Tools: 9.2.2.8

- The product structure has multiple levels and phantoms was not implemented in the previous system. To avoid generating multiple workorders for each sub-assembly, phantoms are being introduced progressively.

- Floor stock. There was no consistent identification in the previous system and hence some were having real inventory in the books. Adopting floor stock in item branch and bills (issue type code=F) enabled WH to pick the right materials quicker.

- There were potential new opportunities like invoking WO print from row exit (customized solution), using lot holds in manufacturing process, etc. These were deferred to future phases to focus on this just technical upgrade.

- The new 9.2 feature on Inventory to GL compare was implemented. This eliminated running integrity report multiple times during the week.

Implementation Challenges

The new 9.2 install was built with vanilla objects with no client versions. It took some effort to build all the client versions in a CNC project and move them instead of identifying and promoting every one of them. All the custom objects were sent to outsourced vendor for retrofit into 9.2 system. These custom objects were deployed to PY environment without the associated versions. Consultants need to identify and put those versions in multiple OMW projects.

By mistake, the DV versions were copied from 9.1 DV to 9.2 DV (instead of from 9.1 PD). Since few rounds of user testing were already complete, the versions were compared manually to catch up with 9.1 PD configurations. Redundant processing options (especially the dates) were noticed even after go-live.

Client uses minimal functionality in CAM area. 9.2 system was expecting WO type as 04 for service orders to work (in P40040 doc master application). This was not a requirement in 9.1 release

PO receipt and item-branch cost revisions had additional screen to select the row first instead of going directly into the data points. These were some of the training related issues. DSI interface with JDE gave issues on the receiving with receipt routing and on lot-controlled items. The DSI scripts required code updates.

Client wanted to use the new enhancement in CST* fields in Workorders to avoid penny dollar variances. These variances were also coming from UOM conversions and consolidating multiple IM entries. It was decided to defer to the future since changing data dictionary was too risky

User Experience

Conference Room Pilots: (CRP) There were three rounds of testing. CRP as unit testing, IST as JDE+DSI testing and finally the user testing (UAT). UAT was performed with the role security to avoid any post-go live issues.

Data conversion: Three mock data conversion happened for every CRP testing. Record count of key tables were compared every time. During UAT, the sleeper jobs were executed in 9.2 to check for any errors. In other previous rounds, data was converted after the daily scheduler jobs in 9.2 PD. After go-live, it was noticed some fields truncated the field values (example: UPQT) and SQL update was executed on the past transactions.

User grids were not imported from 9.1 to 9.2. Also, they were few applications like P3401 where the grid sequence is locked in 9.2. User cannot modify the first few lines of sort sequence in 9.2

Testing: DWS's swiftest tool was used in CRP and IST with SMEs and key users developing the automated test scripts. In UAT, end-to-end transaction was executed manually.

Training and Documentation: User training (if any) was done predominantly during CRP execution. Additional sessions were conducted to walk thru the process and clarify any functional issues. Since the super users were conducting CRP tests it was helpful with the knowledge transfer and learning.

Typical user feedback after training:

Lots of concepts and areas. Watchlists simplified some of the exception generation
Lots of screens and applications to inquire basic data. Cafe1 was the proposed solution
Why more order numbers cannot be inserted in the data selection field.

Getting Started. XE to 9.2

This is from a major upgrade from XE to 9.2. Heavily customized environment that makes every application and report unique to the client

The change management was the biggest challenge. The client is using XE for past 20 years well before all the social media apps were invented!

The end users created their own custom versions on their machines (Client-server environment). The log-off time in XE was none so that they can go for long breaks and come back right to their application. If the report version needed a lot data selection values user created their own versions. They could query a large amount of data and can still see all of them in one window (9.2 system breaks the data into 10 rows and user need to click next arrow or last arrow). Users did not like the time out session on the queries. The menus were so outdated that many objects/versions were repeated in multiple menu tasks. Basically, every role had their own menu task for easier control and monitoring security.

Lot of education and training needed to bring the focus to web-enabled version rather than client-server software

First challenge in 9.2 manufacturing was the BU and branch in the work center creation. XE was very open without the branch combination. There were using master routing functionality and expected branch control in that area. For the same FG made in two branches, master routing can not be used only in one branch.

Secondly, the workorders in XE had flexibility to change the branch after WO is created and processed. This feature gave them lot flexibility in day to day operations. This is not possible in 9.2 and was considered a major constraint.

"There were multiple rounds of data conversions to validate key fields and better understanding of JDE functionality in master data areas."

"Top management was very supportive to adopt best business practices and avoiding any customization."

Key Statistics

Total AB#: 80000+
Number of JDE users: 500+
E1 System 9.2 release, toolset 9.2.2.8
Oneview, Cafe1, watchlist, UPK used.
Item master: 2.8 million
Item branch: 4.1 million
Bills:28+ million
Routing: 4+ million
Branches: 17
Work Centers: 4000+
GL: 60+ million
Assets: 16000+

Challenges

Due to old way of thinking, all workorders were auto generated after MRP every night. Users then manually deleted them and re-enter new ones! This practice was completely stopped

Custom mod on P4101 to have item templates for various stocking type, line type combinations. Engineering picks the right template to generate new part-number and move on with the branch additions. Business wanted to know which Engineer picked the part first time. This info was available in cardex but there were millions of records in 20 years of XE usage. A custom UBE was developed to update URCD, LFDJ fields to continuously update this every night. Using form extension, these fields were available in the Item master grid. One-time SQL was executed to bring the past data from XE to 9.2 system.
Workcenter application in 9.2 has WC type field, which need to be 0 for standalone workcenter. This was not required in XE days. All current workcenters were remapped to accommodate the new value.
They were 7+ varieties doc types in workorder doc for manufacturing and maintenance applications. 9.2 required updating P40041 with correct values to avoid errors in inquires and transactions.

"Strong technical support helped with data migration from XE system to E1 tables using custom SQL program process. This saved lot of time in multiple data conversion uploads."

The author was the lead consultant in the implementations. Author respects all relevant trademarks which are marked accordingly

Conference Room Pilots: (CRP) There were three rounds of testing. CRP as unit testing, IST as JDE+DSI testing and finally the user testing (UAT). UAT was performed with the role security to avoid any post-go live issues.

Data conversion: Three mock data conversion happened for every CRP testing. Record count of key tables were compared every time. During UAT, the sleeper jobs were executed in 9.2 to check for any errors. In other previous rounds, data was converted after the daily scheduler jobs in 9.2 PD.

Testing: HP Quality system was used in developing test scripts and executing them. The bugs were reported within the HP system and monitored for resolutions. In UAT, end-to-end transaction was executed manually.

Training and Documentation: User training (if any) was done predominantly during CRP execution. Additional sessions were conducted to walk thru the process and clarify any functional issues. Since the super users were conducting CRP tests it was helpful with the knowledge transfer and learning.

Implementing E1 manufacturing in industrial automation company

Whitepaper
May 2017

Getting Started

The purpose of this whitepaper is to explain the uniqueness of the JDE manufacturing modules implementation and share the lessons learned during the project. The document explains the major business benefits gained from another Tier-1 system to JDEdwards (JDE) E1 system

The client is a leader in industrial automation products. This company got acquired by a world-wide company and they decided to merge to the corporate system. The manufacturing implementation was the first in the new world-wide organization.

The implementation started in Nov 2016 and got completed in May 2017. Manufacturing modules includes PDM, planning (MRP), shop floor management, product costing & manufacturing accounting. Forecasting was limited to user upload of data into the system on monthly basis.

Key Statistics (DATA IN JDE)

Branch Plants: Two
Item Records per branch:
Item master: 15000(M-3200, P-10000)
Bill of materials (at cutover)
--Total Records: 36000, parents:3300
Routing (at cutover)
-Total Records: 2500, parents: 2500
Workcenters: One per mfg BP

Major business benefits

- The business is mostly sales order driven. There were daily excel files updated and shared for production meetings. Users spent lot of time in preparation of these files. JDE helped to present the data in Cafe1 view showing customer orders with inventory & WO progress. Production meetings were short and productive!

- In their previous system, WIP was a physical location and that enabled lot of cycle count issues. JDE helped them in moving away from a WIP location but still monitor the WIP $ correctly. WO parts issue and completion were not systematic previously. JDE bought the discipline and visibility across all users so that duplication efforts are minimized. WO variance in very huge dollars became manageable overnight!

- Doing rework or de-kitting a product was a time-consuming process previously. Simple repair workorder process made their tasks easier. There was no need for closing all open work orders at the month-end for accounting reconciliation.

- The product structure has multiple levels and phantoms was not implemented in the previous system. To avoid generating multiple workorders for each sub-assembly, phantoms are being introduced progressively.

- Floor stock. There was no consistent identification in the previous system and hence some were having real inventory in the books. Adopting floor stock in item branch and bills (issue type code=F) enabled WH to pick the right materials quicker.

Implementation Challenges

PDM: Extracting data from PLM software had resource constraints and time delays. The cut-over criteria were kept changing, like how many years of past sales data, inventory positions and defining current bills. A component from vendor showed up on the go-live date, which was considered obsolete in the cutover. There was wrong assumption that all uom were each. Adding different UOM after conversion posed challenge in the bills, since it has already taken the item master properties. That also initiated continuous addition of uom conversions. On the bills, some of the critical sub-assemblies were dropped for no reason only to be found during cost-rollups. In their previous system, make part can't be placed on PO so there was constant changing of stocking types.

Costing: Standard costing was used in the implementation. That required lot of data cleanup on the item master cost data since there were not accurate. The inaccurate bills showed up quickly on cost analysis. There was X1 factor added for material burden and that required more testing & validation.

JDE Security: This plant joined the corporate system so the security roles were just assigned in the beginning itself. But the plant users had multiple roles like CS manager responsible for planning function, Cost accountant role which includes WO to cycle count, etc. This required lot of repetitive changes to the security access to their required applications/reports. Finally, a new role was added just for cost accountant since it is not the same as regular finance role.

"Top management was very supportive to adopt best business practices and avoiding any customization."

User Experience

Conference Room Pilots: (CRP) Two CRPs were executed to verify/validate the data upload, transaction processing and user hands-on experience. There were two rounds of UATs as well to re-define some business processes with full converted data.

Training and Documentation: User training was done predominantly during CRP execution. Additional sessions were conducted to walk thru the process and clarify any functional issues. Since the super users were conducting CRP tests it was helpful with the knowledge transfer and faster learning.

Typical user feedback after training:

- *Lots of concepts and areas. User learning and absorption is time consuming*
- *Lots of screens and applications to inquire basic data.*
- *Confusion between form exit and row exit options.*
- *Why more order numbers cannot be inserted in the data selection field.*
- *Status flows in SO, PO and WO transactions. Why some reports update them and others do not?*
- *There are lots of configurations needed in every module and users underestimated the learning curve.*

Next phases

There are several potential areas for continuous improvement and system utilization:

Bar codes are already printed in the workorder documentation. Next stage of the project will implement bar code scanners on mfg and inventory

Receipt routing: based on the inspection requirement, the items (coming from purchase order or thru workorder) go into receipt routing for QA clearance. This is a changed process, where QA report WO completions so that inventory gets updated after their approvals.

OneView enhancements: Ability to see shortages with scheduled PO delivery dates; quick metrics on time spent on workorders from release to completion; Zero cost components alerts, etc are some of the enhancements planned during support period.

MRP enhancements: The basic model MRP was rolled-out in this short implementation time frame. There are potential opportunities to bring in forecast consumption (including customer specific forecasts), using period of supply concepts and lead time rollups.

WO completions: Current model is the use of manual WO material issues (ITC=I) but super backflush so that product routing standard hours are captured as actuals. (PFBF=B). Once the system stabilizes, superbackflush may include consuming hard-committed inventory and routing labor. Additional labor can be reported from stand-alone time entry.

"There were multiple rounds of data conversions to validate key fields and better understanding of JDE functionality in master data areas."

Key Statistics

Number of WO released in a week: 50
Number of quality specs: not used

Total customer AB#: 25+
Total vendor AB#: 500+
Number of JDE users: 60
E1 System 9.1 release, toolset 9.1.5
Oneview, Cafe1, watchlist, UPK used.

"Strong technical support helped with data migration from legacy system to E1 tables using Z-file & custom program process. This saved lot of time in multiple data conversion uploads."

IMPLEMENTING E1 MANUFACTURING IN HEAVY ENGINEERING COMPANY

Getting Started

The purpose of this whitepaper is to explain the uniqueness of the JDE manufacturing modules implementation and share the lessons learned during the project. The document explains the major business benefits from the transition of legacy system to JDEdwards (JDE) E1 system

The client is a large heavy metal products manufacturer and this first phase was at a smaller facility. Their legacy system was outdated technologically and they decided to adopt tier-1 ERP system.

The implementation started in March 2016 and got completed in Oct 2016. Manufacturing modules includes PDM, planning (MRP), shop floor management, product costing, manufacturing accounting and quality management. Forecasting not used since this plant is ETO type of industry.

Key Statistics (DATA IN JDE)

Branch Plants: four
Item Records
Total records: item master: 5000(M-1250, P-1800, 0-1500, B-360)
Bill of materials (at cutover)
--Total Records: 10400
Routing (at cutover)
-Total Records: 9990
Workcenters: 25 per mfg BP

Major business benefits

- There was disconnect between sales orders and manufacturing orders. Using line type W, there was workorders generated for each sales order line. To assist with field-level installation, each product has quantity of one in every sales order line. Activating WO completions to update back SO helped in better operations monitoring.

- Manufacturing operations goes through multiple routing steps and there could be hold-ups at each operation. JDE's dispatch inquiry was not enough to track the workorders. This was modified to show open routings, after labor entry updates the operation status to 80. Updating WO request date manually helped to clear the backlog visually in the inquiry application. The inquiry linked the SO pick date so that CSRs and Planners are on the same page all the time!

- One of the sub-assembly level product was kept in FT in the old system. This posed challenges in the physical count and in usage. The UOM was changed to EA and this necessitated all the changes to bills. This was a major conceptual change and it took a while for adoption in the system.

- The product is serial number driven but there was a need for a fractional quantity and the barcode interface was not reading the serial number table. Hence all the products were lot controlled. Lot trace/track is a critical piece like any other industry.

- Simple DRP/MRP usage. Some sales orders can be placed for pick at the DC and hence the need for DRP. Most of the finished goods have their unique itemids for each project and product structures were built for that project.

Implementation Challenges

Bills/routing: Legacy system had lot of past inaccurate data. The data was not updated frequently and operations had their own way of running the manufacturing. There was lot of data clean-up (like removing phantom lines) and deciding the cut-off point for conversion was a challenge given the fast-moving business model. Used the JDE Z-file process to upload converted data. There was flex-accounting turned-on and need to use routing filed job-type to enable correct account posting of labor.

Costing: Standard costing was used in the new implementation. That required lot of data cleanup on the item master cost data. The outside operation as a part of normal routing was not managed well and had to bring those costs upfront for the cost roll-up. WIP was never correct in their legacy system. JDE enabled a correct visibility of WIP at WO level

Time Entry: This is a discrete manufacturing shop environment. Capturing and monitoring labor time was a major focus. This was not done in legacy system. Also, management wanted to capture idle time due to tools, downtime, rework time, etc. The client expected a simple clock-in and clock-out application, which is not available in JDE. Regular JDE time entry was adopted with minimal data entry. When the operation was completed from labor side, a manual ops status update to 80 was done to refresh the dispatch list

Quality Module: JDE does not provide data upload functionality in the quality module tables. A custom data upload utility was built for them.

"Top management was very supportive to adopt best business practices and avoiding any customization."

User Experience

Conference Room Pilots: (CRP) Two CRPs were executed to verify/validate the data upload, transaction processing and user hands-on experience. There were two rounds of UATs as well to re-define some business processes with real time full data.

Training and Documentation: User training was done predominantly during CRP execution. Additional sessions were conducted to walk thru the process and clarify any functional issues. Since the super users were conducting CRP tests it was helpful with the knowledge transfer and faster learning.

Typical user feedback after training:

- *Lots of concepts and areas. User learning and absorption is time consuming*
- *Lots of screens and applications to inquire basic data.*
- *Confusion between form exit and row exit options.*
- *Why more order numbers cannot be inserted in the data selection field.*
- *Status flows in SO, PO and WO transactions. Why some reports update them and others do not?*
- *There are lots of configurations needed in every module and users underestimated the learning curve.*

Next phases

There are several potential areas for continuous improvement and system utilization:

Bar codes are printed in the workorder documentation. Next stage of the project will implement bar code scanners on mfg and inventory

Capacity planning and workorder scheduling. Production scheduling is identified as the next project step. JDE does not provide the routing attributes capabilities (example: Machine 1 can handle only certain diameter products). Constraint based production scheduling software is a must for the shop management.

Receipt routing: based on the inspection requirement, the items (coming from purchase order or thru workorder) go into receipt routing for QA clearance. This is a changed process, where QA report WO completions so that inventory gets updated after their approvals.

Multi-level S&D inquiry. Single item S&D inquiry does not give total project level analysis. Custom inquiry is being built to bring all project related products into one visible screen for the management review. This could be used in their daily shop floor stand-up meetings as well to prioritize orders.

MRP enhancements: The basic model MRP was rolled-out in this short implementation time frame. There are potential opportunities to bring in product forecasts (including customer specific forecasts, replacing early order material list), using period of supply concepts and lead time rollups.

Super backflush: Backflush was used in the initial implementation since many items are manually issued anyway. There are places where super backflush can be used but that require revamping the product structures.

"There were multiple rounds of data conversions to validate key fields and better understanding of JDE functionality in master data areas."

Key Statistics

Number of WO released in a week: 200
Total quality records: TBD
Number of quality specs: not used
Number of quality test-ids: 14 to start with

Total customer AB#: 25+
Total vendor AB#: 500+
Number of JDE users: 150
E1 System 9.2 release, toolset 9.2
Oneview, Cafe1, watchlist, UPK used.

"Strong technical support helped with data migration from legacy system to E1 tables using Z-file process. This saved lot of efforts in multiple data uploads."

IMPLEMENTING E1 MANUFACTURING IN OIL & GAS INDUSTRY

Getting Started

The purpose of this whitepaper is to explain the uniqueness of the JDE manufacturing modules implementation and share the lessons learned during the project. The document explains the major business benefits from the transition of legacy system to JDEdwards (JDE) E1 system

The client is $25million family owned company in the Oil & gas industry manufacturing gas sampling equipment. The support on their legacy system was ending and they decided to adopt tier-1 ERP system.

The implementation started in June 2015 and got completed in Oct 2015. Manufacturing modules includes PDM, planning (MRP), shop floor management, product costing, manufacturing accounting and quality management. Forecasting not used since the data was still at family level.

Key Statistics (DATA IN JDE)

Branch Plants: two

Item Records

Total records: item master: 20000(Finished Goods: 10306,Raw materials: 6591, X line 1537, non-stock 1760)

Bill of materials (as of 1 Oct 2015)

--Total Records: 92860

Routing (as of 1 Oct 2015)

-Total Records: 50638

Workcenters: 30

Major business benefits

- Legacy system was used with re-order point. In E1, safety stock concept was used. Client moved to demand-driven planning from static ROP levels. Long-lead time system orders gave visibility to combine procurement process ahead. Using fixed order quantity in workorders helped them to avoid multiple change-overs in machine shop.

- No paper based logs. Orders having engineering or estimation issues were noted and kept in a log book. There were more than 25 workorder priority codes and these were constantly changed on daily basis. Usage of media attachment and remark fields made the transactions transparent to any user.

- Outside operations. Besides the outside operations defined in the master routing, operations can send items out if in-house capacity is not available. This was completely manual process with no visibility. Using JDE WOs generating outside operations purchase orders gave visibility and control to operations, purchasing and accounting.

- Lot/Serial number. Client has major needs on customer certification and the need to capture quality testing data. Quality module was implemented along with workorders to capture test results. Serial numbers are generated upfront during WO entry and monitored along the mfg process.

- Operations were capturing labor hours used in inventory transactions as a part of routing step. If the inventory is short, there were multiple routing steps to go back and forth. Using WO inventory commitment and shortage analysis removed multiple routing steps and release the order only when all the materials are available.

Implementation Challenges

Combined bills/routing: Legacy system has one single table for bills and routing with lot of text lines. The data was not updated frequently and operations had their own way of running the manufacturing. Splitting the data into bills, routing and routing attachment was challenging with multiple uploads in CRPs. Client's tech team developed in-house process to append all text lines into item master notes.

Costing: Company was using average costing and the variation on the finished goods cost was very high due to labor skills used. This also resulted in lack of margin visibility. Standard costing was used in the new implementation. That required lot of data cleanup on the 'time-basis' on the routing. The outside operation as a part of normal routing was not managed well and we have to bring those costs upfront for the cost roll-up.

Time Entry: This is a machine shop environment. Capturing and monitoring labor time was a major focus. Operations had the concept of 'labor balancing' to account the entire time spent by an operator on work-order or non-productive work. The client expected a simple clock-in and clock-out application. Regular JDE time entry was adopted with minimal data entry. Labor balancing concept was removed since WO time and payroll time need not match each other.

Quality Module: JDE does not provide data upload functionality in the quality module tables. Client did the table conversion using SQL from the spreadsheets and that needed lot of front-end testing

User Experience

Conference Room Pilots: (CRP) Two CRPs were executed to verify/validate the data upload, transaction processing and user hands-on experience.

Training and Documentation: User training was done predominantly during CRP execution. Additional sessions were conducted to walk thru the process and clarify any functional issues. Since the super users were conducting CRP tests it was helpful with the knowledge transfer and faster learning. End to end tests were minimal since the client thought the best learning happens after go-live.

Typical user feedback after training:

- *Lots of concepts and areas. User learning and absorption is time consuming*
- *Lots of screens and applications to inquire basic data. Example: Legacy system has open sales order inquiry with on-hand inventory data in the same view.*
- *Confusion between form exit and row exit options.*
- *Why more order numbers cannot be inserted in the data selection field.*
- *Status flows in SO, PO and WO transactions. Why some reports update them and others do not? They liked the concept on WO hold status code that does not make the orders invisible.*
- *There are lots of configurations needed in every module and users underestimated the learning curve.*

Next phases

There are several potential areas for continuous improvement and system utilization:

Bar codes are printed in the workorder documentation. Next stage of the project will implement bar code scanners on mfg and inventory

Capacity planning and workorder scheduling. Production scheduling is identified as the next project step. JDE does not provide the routing attributes capabilities (example: SAW machine 1 can handle only certain diameter products). Constraint based production scheduling software is a must for the machine shop management.

Receipt routing: based on the inspection requirement, the items (coming from purchase order or thru workorder) go into receipt routing for QA clearance. This is a changed process, where QC can review the lot dates and enter the country of origin (COO) in the lots. The COO gets printed in the shipping documents for customs.

Dispatch list enhancement. Custom changes proposed to check whether the last operation is complete or not. Shop floor operators need dispatch list to monitor the job status and hence this is a critical requirement.

MRP enhancements: The basic model MRP was rolled-out in this short implementation time frame. There are potential opportunities to bring in product forecasts (including customer specific forecasts), using period of supply concepts and lead time rollups.

Usage of phantoms: The average bill has five levels and many of intermediate products can be configured as phantoms. Since those items can be sold as well, the decision has been deferred for after go-live phase

"All major product cost changes were done in CRP3. Existing inventory quantity from legacy was extracted and v-lookup done to project the inventory cost in JDE. This took away all the surprises on inventory valuation on go-live day"

Key Statistics

Number of WO released in a week: 150
Total quality records: 9375
Number of quality specs: 54
Number of quality test-ids: 137

Total customer AB#: 4900
Total vendor AB#: 930
Number of JDE users: 70
E1 System 9.1 release, toolset 9.1
Oneview, watchlist, UPK used.

"Strong technical support helped with data migration from legacy system to E1 tables using Z-file process. This saved lot of efforts in multiple data uploads."

E1 8.12 TO 9.1 UPGRADE IN ENTERTAINMENT INDUSTRY

Getting Started

The purpose of this whitepaper is to explain the uniqueness of the JDE EnterpriseOne upgrade from 8.12 to 9.1 at a casino company. JDE is used in procurement, inventory, manufacturing and accounting functions. Work orders are processed for making cakes and other food recipes. Sales orders are used for inter and intra company transfers. The document explains the major business benefits and transition experience from the upgrade

The implementation started in Aug 2013 and got completed in Nov 2013. Major business benefits driven from this upgrade besides the tool upgrade were:

- Inventory control. Departments were moving materials to another using sales transfer (ST/OT). System allowed such transfers even if the cost records are not right in the receiving branch. This posed monthly reconciliation issues. We were able to lock such transfers till formal item branch records are set. On the cycle count, 9.1 had modified feature for freeze count, which actually resets on-hand inventory before you enter counted quantity. This enhancement helped users immensely without the worry of ever changing on-hand quantity in food branch plants.

- Procurement. Simple sales tax calculation without vertex interface was never used previously. 9.1 upgrade gave this opportunity to process sales tax calculations automatically with defined setups in ship-to address and simple tax rate tables. Similarly features like purchase order revisions, item restrictions were also implemented during this upgrade. In casino/entertainment industry, there are lots of vendor rebates for the products bought constantly during the year. Rebate agreement processing was implemented to track the rebate entitlements and also its usage. JDE keep tracks of purchase orders release under these agreements and has a generic report to show all the details again each vendor. This helped a lot of resource time spent every quarter to calculate the rebates and follow-up with vendors.

Key Statistics (data loaded in JDE)
Branch Plants 8
Item Records 15000 (incl 2200 M stocking types)
Bill of materials: parents: 2200 --Total Records: 17200
Routing: not used

- Manufacturing. This company uses multi-mode manufacturing with standard costs on manufacturing and average costs on other items. All combinations of unit of measures are used in bill of materials, since recipes goes through constant revisions in the kitchen. While standardization of uoms was an option at this project, it was considered too complicated given the time lines. During the testing, incidents were reported on the WO part list issues quantity. JDE was showing incorrect uom in the application, while the cardex was written correct. We have to get a paper fix from Oracle just one week before go-live. This reinforced the reasoning behind running complete end-to-end testing in all functions even for upgrades!

Implementation Challenges

-Business process documentation. Like most of the JDE clients, there were no formal written business process documentations. The training tools used for 8.12 release was never updated. Users have to spend few weeks to write them again and formally review/publish them. This helped in later steps in the project cycle

-Integrated scripts. Users identified their individual functional test scripts and wrote them. However building integrated scripts was a challenge since the transactions has to go to different departments and come back for originator review. CRP1 was limited to unit testing and CRP2 was defined as integrated testing. User acceptance testing (UAT) became as another CRP, since few bugs were fixed in the codes.

-Interfaces: CRPs were handled in PY environment but interfaces like create forms were not installed in PY system. 9.1 upgrade did show up with few changes needed in create-forms. UAT was done in PD environment with create forms running. Format fixes in create forms were done directly in PD instance.

- Custom changes: Most of the key reports like R43500 (PO print), R43510 (receivers) showed up as pristine with no R55* or R56* objects. However, there were major changes to the formats (not much version overrides) without the change in object names. CRP1 ended up with all these formats not in sync with 8.12 reports. New objects with R55* naming were created for testing again during CRP2. Probably, this issue could have been avoided if pre-CRP1 sanity tests were conducted and key reported printed from the 9.1 release. 8.12 menus had ZJDE and RIS versions. This posed risks in code conversions. It was too late in the project stage to fix all the versions in the menus.

User Experience

Functional Testing: Two conference room pilots were dedicated to the power users to drive the test scenarios completions. First CRP was a stand-alone and the second one was integrated for end-to-end testing (like PO requests to GL entries). Most of the change requests from CRPs were on changing data selection (or) report format (line spaces) requirements.

Training and Documentation: This is an upgrade project with minimal functionality changes. However, the front end and other tools have changed significantly from 8.12 to 9.1. User training was done in two levels. Power users were trained before CRP and all other users after UAT. There was a training survey which helped to identify gap areas and gain user feedback before the go-live.

Data Upload/security: The data conversion was done by CNC team with no major issues and was repeated for every CRP to ensure no surprises during go-live. Some UDC values did not convert during final cut-over and has to be manually monitored /fixed. Security was controlled so that users do not execute any transaction during final cut-over phase. No major changes in security done in this upgrade other than new reports.

Whitepaper note: The author was a functional consultant involved in this project. Author respects all relevant trademarks which are marked accordingly.

FIXED ASSET TRANSFER TO NEW COMPANY

Getting Started

Key Statistics (data loaded in JDE)	
Companies	two
Fixed assets Records	6182
Asset details: Depreciable assets, rental equipment	

The purpose of this whitepaper is to explain the uniqueness of the project involving fixed asset transfer to a new company. The client is a major construction company involved directly or subcontracting major construction projects.

The company (privately held) was acquired by another privately held company. The new corporate company wanted all the books to be started with clean slate with the acquisition date. The corporate company does not use JDE software.

New company code was created in JDE and all the chart of accounts mapped. From the fixed assets side, there were two major challenges.

(1) All field equipment assets were using asset-id in their time entry and cost capture transactions. Hence we need to maintain the same asset-id in the new company.

(2) After the acquisition, many of the asset's cost were modified based on the acquisition process. There were new depreciation methods different from previous ones.

This posed limitation for using standard JDE process in asset disposal and/or asset transfer. Hence the following data update process was initiated and implemented.

Extract current F1201 records for active assets. Append a unique suffix to asset-id, equipment-id and serial number fields on the current company. Reload the new file using Z file process, updating the new company code.

Update the company in F1202 file. SQL update the asset-id in F1202 for the old records. The GL was never modified. User was aware that FA ledger and GL ledger for the previous company integrity will be lost.

Execute test transactions for purchase orders, inventory issues for these assets in the new company.

Run depreciation for the assets in the new company. Since this change happened in Oct, user did not want to run from previous year. The beginning balance was uploaded using a custom upload application directly into the F1202 table. While creating F1202 entries, depreciation method and types were also updated. No update was performed for the rental equipment.

IMPLEMENTING JDE MANUFACTURING

Getting Started

By Matt Ravikumar

The purpose of this whitepaper is to explain the uniqueness of the Fremont JDE manufacturing modules implementation and share the lessons learned during the project.

With double digit product sales growth and shared customers, Panomics products are poised to gain more synergy with Affymetrix products. The common JDE ERP system platform is a great enabler to gain synergy among products & services resulting in better customer service.

The implementation started in early March 2009 and completed in Sep 2009. There were about 250 JDE objects changed to handle the project requirements. Major code development activities were:

- We build custom products every day and require very quick entry of part numbers and bills in the system so that we are able to ship out immediately. We cannot wait for days for the CO or ECO process to build products. A unique upload tool was built to bring data from Bioinformatics or from R&D worksheets into JDE. This includes loading item master, item branch, bill of materials and routing. The tool also updates standard costs, primary inventory location and ABC codes. After every upload, the system sends email confirmations. A validation report is available listing the details of what exactly was loaded into the JDE system.

- Fremont requires a very user-friendly work order completion system since back flush at bulk and FG level multiplex times every day. This new interface enabled Operations to generate and complete a work order with very few steps. This was accomplished using standard JDE super back flush functionality but layered with an easy to use interface. Fremont is reporting standard hours (actual labor hour reporting will commence at some point in the future). To improve user productivity in data search and inquiry, an inquiry application in item branch was built to locate key product parameters quickly.

- Several new reports were built in JDE: 1) Costed Inventory Report shows who performed the transaction, the related GL account, and quantities/costs. 2) Low Inventory Alert Report provides the daily on-hand qty with respect to defined safety stock. 3) Negative Inventory Report indicates all negative inventory qty parts as the Fremont business model has product types that go negative when we shipped. This report help to make the necessary adjustments every month end.

Key Statistics (data loaded in JDE)- sep 2009

Branch Plant 1004
Item Records (before Fremont the item master count: 27000)
- Finished Goods loaded in JDE: 28173 plus
-Raw materials and assembly loaded in JDE: 28984
Bill of materials (as of 30 Sep 09)
-Number of bills: 15813 -Total Records: 63541
Routing (as of 30 Sep 09)
-Number of routings: 10064

Overlap of part numbering scheme with Santa Clara & other branches: Early in the project we identified possible duplication of part numbers between Fremont and Santa Clara. All current 6-digit part numbers were modified to have seven digits. Late in the project, there were about 18 overlapping items (of 5-digit format) that came out as duplicates. Since they were obsolete items in Santa Clara, it was decided to re-use the same numbers for Fremont.

Primary Unit of Measure and decimals: JDE production system has been configured not to take decimals in the inventory management application. (Primary UoM is the least unit of measure). Other applications like bill and routing handle decimals. Fremont had to re-map the majority of the items to the next low level unit of measure. All bills and inventory had to be corrected in their existing Expandable ERP system before cutover.

Data Upload: Every UAT had the complete data set from Expandable system uploaded into JDE. With multiple reviews and data corrections, we were able to achieve 100% success rate during the final cutover. SharePoint: For project communication to share all documentation, SharePoint site was used extensively. This helped achieve timely communication and share the knowledge across all the users.

User Experience

User Acceptance Testing: (UAT) Three UATs were executed to verify/validate the data upload, transaction processing and user hands-on experience.

Training and Documentation: User training was done predominantly during UAT execution. Additional sessions were conducted to walk thru the process and clarify any functional issues. Since the actual users were conducting UAT tests it was helpful with the knowledge transfer and faster learning.

SOFA Reporting Category Codes: All key cat codes were mapped in Expandable system such that the extracts would be populated with the correct data for subsequent upload.

Cost Roll Access for Operations: Fremont business model introduces many new parts on a more frequent basis compared to other facilities. It was decided to grant Operations the access to conduct cost simulation. Cost review and Cost freeze is still executed by the Cost Accounting function.

"Defining and developing the relevant system test scenarios helped the project be successful."

Next phases

There are several potential areas for continuous improvement and system utilization:

Item substitutions: We can configure products with substitutions such that customer can receive an alternate product if the original is not available. The system is able to handle this.

Planning system, Plan of Record (POR): Currently we plan materials based on safety stocks. A daily low inventory alert report guides us for replenishments. There is the future potential to merge the planning process with the current DPR/MRP at the corporate level.

Kits/Configurator: The Fremont business model does not justify the need for the configurator functionality. However, we could start kits to eliminate having shipping releasing work orders to make products just in time for shipping.

Lot management: most of the products are "lot optional" currently. We could use the advanced lot control functions (e.g. sell by date) if we decide to so in the future.

Cycle counting: Fremont did the evaluation of ABC analysis outside the system and the items were identified and uploaded during cutover. Currently, we identify the cycle count items manually. Once enough history is built, we could utilize the automatic identification process based on the recount days.

Key Statistics

Average number of sales orders in a week: 90
Average number of cycle counts in a week: 4
Number of work orders released in a week: 230
Average number of shipments in a week: 90

Total customer base: ~3600
Total vendor base: ~450
Number of JDE users: 20

"Early user involvement and their participation in UATs reduced the training efforts."

IMPLEMENTING JDE MANUFACTURING

Getting Started

The purpose of this whitepaper is to explain the uniqueness of the Affy-Ohio JDE manufacturing modules implementation and share the lessons learned during the project. The document explains the major business benefits from the transition of FourthShift (FS) ERP to JDEdwards (JDE) system

Key Statistics (data loaded in JDE)

Branch Plant 1003 (bldg1,2,3 & anatrace)
Item Records
Total records in 1003: 7468
- Finished Goods loaded in JDE: 3697 plus
-Raw materials and bulks loaded in JDE: 3771

Bill of materials (as of 14 Aug 2010)
--Total Records: 22345
Routing (as of 14 Aug 2010)
-Number of routings: 11172

With double digit product sales growth and shared customers/vendors, USB products are poised to gain more synergy with Affymetrix products. The common JDE ERP system platform is a great enabler to gain synergy among products & services resulting in better customer service.

The implementation started in late 2009 and getting completed in Aug 2010. USB products joined the current GeneChip dataset in the JDE system. Major code development activities were:

- Excess & Obsolescence (E&O). Affy Ohio has a unique process where E&O is calculated based on safety stock, current sales orders, long term forecast. Any past work order usage in last one year is also factored in towards the analysis. Other Affy branches uses inventory non-moving & slow moving crystal report as the base. FS had a built-in interface to calculate the E&O analysis, which was done after taking the production data into the FS test system. The E&O analysis has been ported into JDE production system and as we stabilize the transactions, the analysis will be done directly in the production system.

- FS bills included routing work instructions; JDE handles bills and routings differently. All the routing instructions from FS were split into a different excel file for upload into JDE. The consolidated routing instruction gets attached to the product routing and gets printed in the work order document. The bills of materials are simple now indicating only material items.

- FourthShift had an interface called ForecastPro for the regular forecasting process. We are continuing to use that application to extract forecast data based on past history and forecasting techniques. This data is directly imported into JDE under forecast type PU for easy identification. This process will change later when the corporate decides to adapt to JDE forecasting process. Currently, Genechip uses predominantly POR as forecast basis.

- Again, for easy identification and simplicity all USB products/components are groups under master planning family 217 and 218 for anatrace products/components.

Implementation Challenges

Overlap of part numbers with GeneChip: Early in the project we identified possible duplication of part numbers between Bldg 1&2 and Bldg 3 (Genechip). The parts are P (purchased) in bldg 3, which needs to be converted into M (manufactured) and the FS bills needed to be attached to them. The accounting cost quantity for the same part could be different. The purchase cost in FS was different that what it is in JDE, for the common parts. Since item upload will fail due to existing Genechip item, we need to ensure bills and routing gets attached without error. If the bill component did not have item branch records, that also needed to be fixed. This entire process took many weeks of review and multiple rounds of cost rolls to find the root causes and fix them.

Primary Unit of Measure and decimals: JDE production system has been configured not to take decimals in the inventory management application. (Primary UoM is the least unit of measure). Other applications like bill and routing handle decimals. USB had to re-map the majority of the items to the next low level unit of measure. All bills and inventory had to be corrected in their existing FS system before cutover. This change was done in FS-test system first, and then deployed into FS-production in middle of July.

Global and local lot counter: FS has global lot number followed by a local counter at the item level. This helped in knowing quickly how many times the product has been diluted. Certain customers also got this information. In JDE, there is only one lot number. This necessitated a lot of user training on how to inquire lot tracking functionality in JDE.

User Experience

User Acceptance Testing: (UAT) Two UATs were executed to verify/validate the data upload, transaction processing and user hands-on experience.

Training and Documentation: User training was done predominantly during UAT execution. Additional sessions were conducted to walk thru the process and clarify any functional issues. Since the super users were conducting UAT tests it was helpful with the knowledge transfer and faster learning. There was a training survey which helped to identify gap areas and gain user feedback before the go-live

SOFA Reporting Category Codes: All key cat codes were mapped in FS system such that the extracts would be populated with the correct data for subsequent upload. SRP7 code was expanded to cover the large footprint of USB family codes. FS specific item classification codes were mapped to JDE codes just for quicker analysis and data control.

"Defining and developing the relevant system test scenarios helped the project be successful."

Next phases

There are several potential areas for continuous improvement and system utilization:

Overall productivity: bldg1&2 users need not cut sales order to bldg3 to sell the materials. And bldg3 releasing PO to bldge1&2 to receive the items. Now all the items are under one branch-1003. Inter-building material movement and usage will be smooth & easy

Planning system: With the overall visibility, anyone in the company can look for product availability and internal stock transfers. With the merge of manufacturing bills for the previously usb bought-outs, now there is total control when exactly those need to be diluted in bldg 1. We are exploring the usage of forecast consuming sales orders that will improve the inventory turnover.

Receipt routing: based on the inspection requirement, the items (coming from purchase order or thru workorder) go into receipt routing for QA clearance. This is a changed process, where QC can review the lot dates and enter the country of origin (COO) in the lots. The COO gets printed in the shipping documents for customs.

Lot management: we are using the best before functionality to map the re-assay dates. When the lots reach re-assay date, system puts them on hold. The inventory will not be available for use (it will still show as on-hand).

Whitepaper note: The author was a full-time employee of the company at the time of the publication. Author respects all relevant trademarks which are marked accordingly.

Key Statistics per week

Average number of sales orders in a week:
Average number of cycle counts in a week:
Number of work orders released in a week: 230
Average number of shipments in a week:

Total customer base:
Total vendor base:
Number of JDE users: 70

"Multiple user acceptance testing events and numerous cost mock-ups reduced the data inaccuracy and made a smooth go-live transition."

IMPLEMENTING JDE MANUFACTURING IN FOOD INDUSTRY

Getting Started

The purpose of this whitepaper is to explain the uniqueness of the JDE manufacturing module implementation at a privately-held food industry company. They manufacture ready-to-eat food items seen in the frozen shelves of all major retailers. The document explains the major business benefits from their transition from Microsoft AX ERP to JDEdwards (JDE) system

With double digit product sales growth and continuous demand for their products, the corporate decided to integrate the acquired company into JDE. (Replacing AX). The common JDE ERP system platform is a great enabler to gain synergy among products & services resulting in better customer service.

The manufacturing module implementation started in late 2011 and got completed in Aug 2012. Major business drivers were:

- Inventory control. There were no cycle counts and inventory ledger was never close to accuracy. Manufacturing lines were down when the raw materials were out of stock. This necessitated next consignment of vendor supplies rushed directly to the plant.

- Product recall. Customer complaints on product quality and possible wider recall were difficult to process due to paper based lot records. There was no easy way to identify a production batch if the vendor reports a shelf life issue.

- QA personnel at the plant were sending emails with color codes item/lot numbers to instruct shop floor from not using them. System was never updated and hence planning thought all the materials are good for usage.

- To post month-end journals, especially if the month-end falls on a weekend, system date in AX system was back-dated to complete GL transactions. All other regular business transactions need to stop till the close process is completed. This resulted huge back log at the beginning of the month to report completions and material issues.

- Demand planning dictated some forecast quantities; plants decided their own batch sizes and purchasing dictated scheduling changes due to supplies availability. This resulted in three stake-holders having their own production plan schedules not synchronized to what the market wants! Plant did not trust the forecast numbers and made their predictions based on plant capacities. This resulted in higher inventory sitting in DCs.

Key Statistics (data loaded in JDE)

Branch Plants	two manufacturing, 8 DCs
Item Records	
Total branch records:	
- Finished Goods loaded in JDE: 3697	plus
-Raw materials and bulks loaded in JDE: 3771	
Bill of materials: parents:	--Total Records: 22345
Routing: parents:	-Number of routings: 11172

Implementation Challenges

-Unit of measures: Conflict of interest within the plant where daily production output was measured in pounds, but demand planning was looking for finished cases or pallets sent to the DCs. This resulted in excess WIP and those not being used back in time during the next production cycle. Work orders generated from planning became the reference point and product cases were converted into pounds for ship floor efficiency tracking.

-Backflush vs superbackflush: Different scenarios were demonstrated both having their own advantages and disadvantages. A decision was made to use back flush to capture material usage at standard for the back-flush identified items. Remaining material usage was entered manually. Labor was added based on the summary output from ADP's time tracking system.

-Planning System: Forecast was moved from mfg. plants to DC level to track their accuracy during later period. Safety stock was maintained at the DCs. Forecast consumption was activated in DC plants. Third party raw material holding warehouses were included in the planning process and the branch relationships extended to the last level. MRP was executed (regen) every day morning at 2am EST, which took about 30 min. Users at the manufacturing plants were given option to run frozen MRP or net change as needed for their branches.

-Manual intervention: Users were skeptical initially to adopt MRP engine to process all the requirements and planning. A week order inventory report was developed to capture past sales history, current open orders and inventory on-hand to help management analysis. This also helped in finding data inaccuracies and setup changes well ahead of product deliveries.

User Experience

User Acceptance Testing: (UAT) Two conference room pilots were dedicated to the power users to drive the test scenarios completions. First CRP was stand-alone and the second one was integrated to see the impact from external tools like DSI interface. Most of the change requests from CRP were on new reporting requirements.

Training and Documentation: User training was done predominantly during UAT execution. Additional sessions were conducted to walk thru the process and clarify any functional issues. Since the super users were conducting UAT tests it was helpful with the knowledge transfer and faster learning. There was a training survey which helped to identify gap areas and gain user feedback before the go-live.

Data Upload: This project had the data upload advantage of having the users maintain the master data in the corporate production system (separate branch plants). Security was controlled so that users do not execute any transaction in production system till go-live. This took away most of the risks associated with master data conversion and testing.

Whitepaper note: The author was a functional consultant involved in this project. Author respects all relevant trademarks which are marked accordingly.

"Defining and developing the relevant system test scenarios helped the project be successful."

"Multiple user acceptance testing events and numerous cost mock-ups reduced the data inaccuracy and made a smooth go-live transition."

How MRP rule-book can optimize the planning system?

Editor's Note:

JD Edwards' EnterpriseOne manufacturing has built its reputation over the years from its ease of use, flexible configurations and adoption in process/discrete manufacturing environments. As we move into the world of complex global manufacturing and distribution channels, JDE as an ERP platform has helpful functionality built into its core manufacturing suite of applications.

Traditional MRP concepts are in place over many decades. JDEdwards' EnterpriseOne has DRP/MRP functionality as defined in APICS terminologies. In this modern age of touch screens and ecommerce, MRP systems are still robust in managing daily supply-chain operations in a manufacturing environment.

Release 9.0 and above has more features to help manufacturing users to fine-tune their systems and adopt these application across the organization. As the business model continuously evolves through new acquisitions, disposal of plant assets, new product introductions (NPI) and industry realignments;-there is a need to develop a MRP rule book. The MRP rule-book will help the organization in successfully communicating system changes to the cross-section of business users. The key business users here include R&D, document control, Logistics, Quality, Manufacturing and Cost accounting.

In this article, Matt Ravikumar takes a look at the overall design of a MRP rulebook and explains its usage in a manufacturing business environment.

The functionality specified in this article is applicable from JDE EnterpriseOne 9.0 onwards.

1 what is a rule-book?

In JDE system, almost the entire functionality of manufacturing planning is consolidated within one single tab under the item branch. Yet, it is amazing to realize each of the field in this tab is very dependent on each other fields. Even a small-scale realignment of product manufacturing and/or distribution necessitates changing many of the planning parameters. The process of studying the system impact of changing business conditions and later adopting them is best controlled by having an MRP rule book.

MRP rule book is a representation of key planning parameters interpreted into business-friendly document. The rule book itself is an excel-based template developed and maintained by power user (or) business analyst within that company. The rule book gets modified quickly based on initial user level participation and feedback. Finally, the rule book becomes a part of the new product introduction and/or major reorganization projects. It also gets included as a part of standard operating procedure (SOP) for the document control function.

We have seen business stakeholders getting surprised on every version of the rulebook. The planning optimization starts by the constant review of the planning parameters. Power users start thinking on the impact of the key fields and its effect on the MRP messages output. Key values like planning fence, message display fence, etc. gets modified depending on the planning family codes. This is one of the biggest benefit of the rule-book, since many times users forget to make changes and leave the system running as-is for many years!

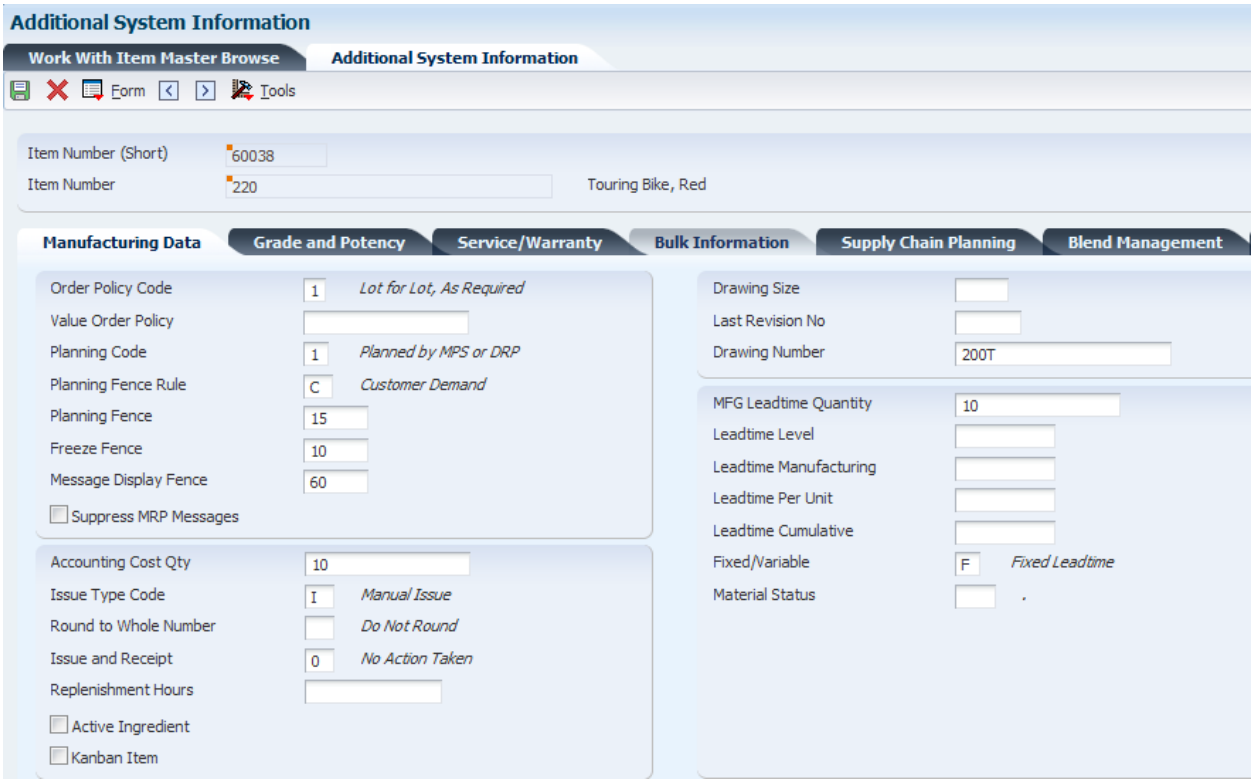


Figure 1. Item branch application (manufacturing tab)

2 How does the template look like?

MRP rulebook								asof date:													v1		rulebook period	
	forecast branches (example DCs)							manufacturing branches							rawmaterial branches (if maintained separately)									
category	ord policy code	value ord policy	plng code	plng fence rule	plng fence	freeze fence	message display fence	ord	value	plng	rule	fence	feeze	message	ord	value	plng	rule	fence	feeze	message	effective from	effective to
jde alias	opc	opv	mpst	mpsp	mtf1	mtf2	mtf3	opc	opv	mpst	mpsp	mtf1	mtf2	mtf3	opc	opv	mpst	mpsp	mtf1	mtf2	mtf3		
MPF-1																							
FG	1		3	H	999	7	60	1		2	C	7	1	60									
FG-NPI				C																		01/01/13	12/31/13
subs								1		2	C	7	1	60									
rawmatl								1		2	C	7	1	60	1		2	C	7	1	60		
packaging																							
exceptions														90									
planner AB#	DC logistics resource							master scheduler							master scheduler								
buyer AB#	could be same as manufacturing buyer							buyer at the plant							buyer at the plant								
MPF-2																							
FG	1		3	H	999	7	60	1		2	C	7	1	60									
FG-NPI				C																		01/01/13	06/01/13
subs								1		2	C	7	1	60									
rawmatl								1		2	C	7	1	60	1		2	C	7	1	60		
packaging																							
exceptions														120									
planner AB#	DC logistics resource							master scheduler							master scheduler								
buyer AB#	could be same as manufacturing buyer							buyer at the plant							buyer at the plant								

Figure 2. MRP rule book template

Contents of the template. (Contents change based on the type of industry and supply chain)

Every product family code (master planning family PRP4) gets a section. It is then broken into key segments like finished goods, subassemblies, raw materials and packaging. The segmentation is based on the industry/company requirements to differentiate the planning messages.

New products coming from each master planning family gets its own planning parameters based on the market demand and lead times. Example: new products always go through planning fence C (customer demand) instead of H (forecast consumption). Having an effective from and effective to date next to the field, prompts the planned to revisit this rule book at the end of full cycle of NPI. The user then advise doc control to flip the C code to H code after ascertaining the business impact.

Normally message display is set to some default days across all products initially. The rule book helps to re-define the display days based on long lead-time items and identify exceptions upfront.

Planning fence rule and its fence are set based on industry practices and type of demand pattern. It also depends on the accuracy of the forecast, which is interestingly not measured directly within the JDE system.

Freeze fence at the finished goods level in the manufacturing plant is set based on type of manufacturing (process vs discreet) and shop floor management practices.

Planning address book is a very useful field to direct all DRP

and MRP messages to the right individual. Companies usually do not depend upon the message detail review (P3411) application to review the overall messages. They use business intelligence or reporting tools to automatically extract and email to the planner/buyers and filter out critical message types like B-order-expedite and O-order. The planner at the DC level could be the logistics resource who is responsible to maintain safety stocks. The planners at the plants are master schedulers or product planners. The rule book establishes this difference and helps in populating right resources when new DCs are added later.

The buyer number is completely dependent on the nature of the business. Normally it is the same across the demand/supply channel except if there are make/buy decision done at the DCs. Sometimes, having the buyer populated at DC branch plants helps in data troubleshooting. Example: Demand at DC may prompt to buy message for the buyer at the DC, if the branch relationships is not set correctly or expired. In this case, the company expected the message sent to manufacturing plant for consolidated workorder processing.

Interestingly, companies are moving towards VMI-vendor managed inventory and still wanted to know the inventory details in their (internal) reports and MRP messages are generated for that branch. The rule book will help immensely in tailoring the planning parameters in those situations.

3 How to roll-out the rule book in a large user-based organization?

The power user in charge of global planning (or) supply-chain who is knowledgeable about the entire business process and also about JDE planning starts this template. Business Analyst from business side or from IT side adds value in segregating the product lines, types, etc.

The rule book is then discussed among smaller audience of product planners, R&D, demand planning, logistics, etc. Their feedback and inputs are included in the next revision.

The entire rule book is then converted into sql statements and executed in non-production environment. The DRP/MRP batch jobs are executed in the non-production environments and then message type/counts are measured against the

two environments. (Non-production and production).

The exceptions on the comparisons are review by the group and the rule book is fine-tuned. It is then deployed into production, by running the updated SQL statements in production environment.

It is important that the document control is involved at various stages so that they are involved and educated on the process. The NPI process could be incrementally adding products into the production system and these values need to be correctly placed as an on-going process.

Ownership:

The rule book integrates various product families and its planning parameters. If left to the individual planners, they will tweak their products without considering the overall company impact. It is important that the ownership and change control lies with the head of the supply-chain planning.

Optimization opportunities:

After six months of first round of implementation, an audit of the rule book will result in better learning opportunities and chance to fine tune it further.

Examples:

Products identified as NPI have matured in the market and it is time flip the planning codes.

The new products replaced a host of existing products and hence its planning codes and planning fence need to be extended. An outdated forecast in a DC for the obsoleted product may still drive the demand in the supply-chain. Extending the planning fence to a higher period will minimize such risks.

The volume of work orders at the sub-assembly level may result in review of the product structure and reduce the paperwork involved.

The feedback received on material shortages during the review period will enable master scheduler to increase the message display fence, change the order policy code to period of supply instead of lot for lot parameter.

Customer complaints on the product availability in the

market will re-direct changes to freeze fence and also order policy codes.

Conclusion

MRP rule-book is the best opportunity to interpret key planning parameters from the item branch records and lay out in a user-friendly document. It is an interactive tool where supply-chain resources can visualize the planning values across the products. ‘One size fits all’ is surely not the mantra in the planning system.

Most importantly, it helps in optimizing the planning system since the business environment has changed considerably since the last time the values were set. Sooner, this document becomes a part of the standard operating procedure in the new product introduction phase.

Although this article is intended only as an overview of the basic functionality, we have attempted to provide sufficient details to allow you to perform the setup and execution steps independently.

Change Management in ERP Projects

- Matt Ravikumar

Tolstoy once said, 'Everyone thinks of changing the world, but no one thinks of changing himself..' This is very true when the change impacts a group of people in an organization. This gets more critical when there is a company-wide software rollout involved. Things get crazy when this involves an ERP software implementation with senior management telling no customizations.

My own story goes like this. I was using QuickBooks desktop version for many years. There was a laptop crash once, but had the file backed up safely. It was tough to depend on one laptop that could crash again but I also did not want to keep private data in a public cloud storage. When Intuit start sending me QuickBooks online offers, there was much reluctance on my part. I had to google the benefits and functionality lost, besides the cost comparisons.

Finally, I decided to sign-up since doing transactions over website was easy and quick. The conversion from desktop data into online data was not easy and I spent hours with Intuit customer care to fix issues. Similar story on the payroll data as well. Finally when things started working, I can do business anywhere, anytime, and saved lot of time in data validations, backups, etc. I am spending one fourth of the time on an average basis for these tasks compared to when I had a desktop version. My resistance to change and not willing to go through change management taught me few lessons

These lessons can be extrapolated to ERP projects. People have been doing the same job for decades. Yes, decades- I am on a project where 20-year-old software is being upgraded to web version. They work with predictive pattern- Office coffee, email checking, check meeting timings, print hard copies of yesterday's reports, take time to grab screenshots of software issues and email to many people, etc. There is a habit involved here. You will get a serious looks when you ask why print reports when data has changed already. Why take screenshots when there is collaborate option within the ERP software. For these types

of habitual patterns, the individual has to decide to make that change.

The next change management challenge is the resistance. In large organizations, people do the same repetitive work and there is hardly any innovation going on. They view software upgrades as possible job replacement. Many times, an individual's knowledge & skills can be programmatically converted into business alerts, watchlist, etc. so that his/her dependency is no longer needed. You don't need two levels of supervision on customer order entry, invoice processing, inventory checks- when the system can throw alerts at the end of the transaction itself.

The final challenge is from training or education. Every individual is so unique in the sense that some are quick learners, want to be left alone in learning. Some prefer team learning. Many of them need multiple learning options. There are preferences like people saying just give me the outline to sit next to me for hands-on training. So one size does not fit all is very true to ERP training. Since you don't want to identify people as slow or fast learners for bias, it's better to do repetitive education session and let the user(s) pick their options.

This is another reason that ERP training originally identified for a few weeks goes on for months.

Change management is tough and hard on people. But can be managed better with awareness and spreading the message often. Top leadership commitment, identifying the right project owners team, early involvement of power/super users and town-hall sessions take the guessing & surprises out. If your project management office is too immersed with day-to-day problems, bring third-party audits and/or other business users who have gone through the process already from your own industry. A new perspective always kindles the team's motivation and generate new ideas.

Let the Dispatch List in E1 Manufacturing work for you.

Scope: If you're a user of JDE EnterpriseOne manufacturing modules, the dispatch list application is the tool to effectively manage your shop-floor operations. This article talk about how a custom modification to the Dispatch List application can help you manage and organize the shop-floor operations better.

Many manufacturing companies using JDE limit their software to release/print workorders and for transactions like Workorder materials issues and Workorder completions. They use some other shop-floor monitoring tools and leave it to a paper-based (or) excel-based methods for work order tracking.

In the current JDE 9.2 release (or, any previous releases), the dispatch list just dumps all the data from workorder routing with some data filters. The immediate response from users is that they don't want to see all future transactions and there is no way to connect back to the demand.

The business needs are,

Is there a way that only open transactions that are due at specific workcenters can be presented in this screen?

Can I also link back to original sales order demand so that CSR or master planner can see where their critical customer order is processing? This assumes that customer order is W line type which creates the workorder references.

If I am at a specific operation on a workorder, can I quickly compare what my next steps are to calculate the residual time required to complete that order?

Business Benefits:

This customized application was deployed a large pipe manufacturer in the East Coast. Planners have their version which will give total picture of the workorders. Using row exit, they can re-schedule the workorders based on customer requirements and changes to production program. This will get immediately reflected in the Shop-floor supervisor's version. In this case, each major work-center

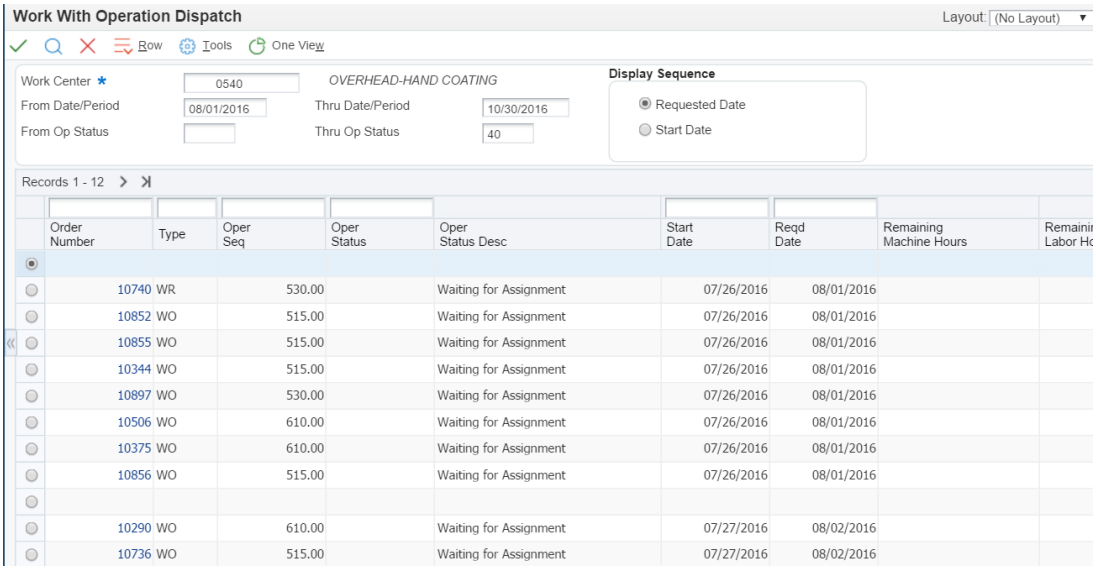
had a supervisor and few operators. They will see what is needed for the day and also what is coming up in the following days. Due to production constraints, if things need to be rescheduled, they will call the planners. There is constant change into weekly production schedules and having paper/excel based system was totally insufficient. There were six to right work-centers involved in making the products. This custom tool helped planning work-load on each work-centers easy. Once the job is completed, the operator will indicate operation status as 80 to indicate it is ready for the next work-center. Hand-held scanners were used to report hours and update operation status.

Step 1.

This is how the standard JDE Dispatch List

(P31220) looks.

See screenshot below

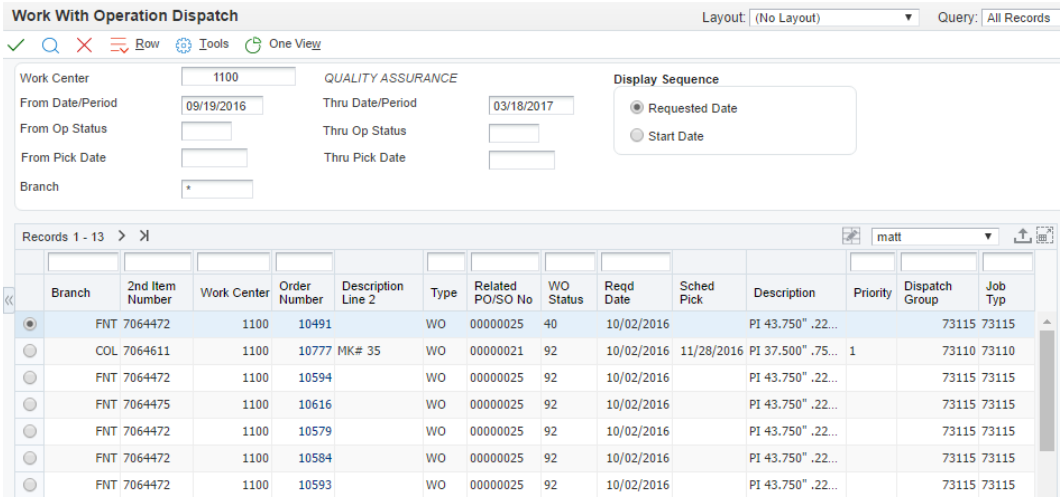


Step 2

Modified P5531220 application with QBE fields.

The header has branch, operation status range,

and WO Pick date range.

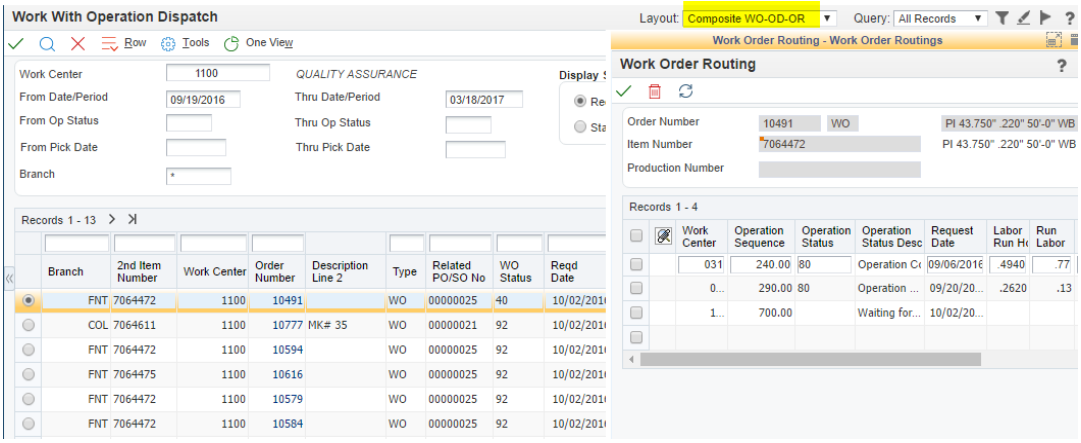


Step 3:

The right-hand side is the Cafe1 combo, where

the Workorder routing shows up on every line on

the dispatch list



Enhancement functional details:

- Modified application P5531220 works

when there is an operation status=80 in any of the operations within a workorder. It picks the very next operation due and displays in the dispatch inquiry application. This application is an inquiry application and does not have any functionality to update any fields

- In case of workorders that have gone through PL/Rtg attachment and not started any work, the application shows the operations pending at every workcenter level. While this is a timing issue, there could be business scenario when PL/Rtg was attached but real production work may not many days or weeks.
- This mod to the application will scan all the WO routing lines and if there are no 80-operation status then display only the very first routing as pending. Rest of the operations will not get displayed
- If there are no OPST=80, then display on the very first operation (OPSQ) in the

application for that workcenter.

Other misc. additions:

1. Developer to introduce the standard rule that only first 20 records are presented and then user can extend the data to the last row. This is for performance
2. Developer to open these fields in the QBE line: scheduled pick-date; item-id, dispatch-group, description2 (which is used as WO comment)
3. In the processing option provide exclusion rule: doc type=WM. And WO status range 40 through 95, so that any WO that got completed but routing did not get updated will still work. This will prompt shop floor supervisor to report labor hours.

Technical details:

1 Following fields are to be added to the header/detail grid

- branch (F4801.MMCU)

(notes: current JDE app does not have this field. Assumption: Same WC# in used in multiple branches)

- priority (F4801.prts)

(notes: This field will show WO priority once planners start updating them)

- reference (F4801.VR01)

(notes: This field will show data like project# from the SO, Job-order ref., etc.)

- related order (F4801.RORN)

(notes: SO# is populated in WO, when SO is created (for W line type). This field can be used for any inquiries.)

- jobsq# (F4211.JOBSQ)

(notes: Project# data if kept in SO tables as

jobsq field. Link WO# to SO# to get this field)

- status comment (f4801.stcm)

(notes: this field to be used IF any manual entry made on WO)

- dispatch group (f3112.jbcd)

(notes: dispatch group is same as production BU in routing)

- WC in the grid

(currently only one WC can be entered and it is a key field)

- branch in the header

2- Business logic for the changes to P31220

- Remove the request date group logic; sorting by operseq and requested date

- display the routing operation and details only based on the following condition: For every workcenter, locate the WO# and check whether the previous operation is complete or not. operation status code=80 indicate that operation is complete. This info is stored in F3112 for each WO.

Two versions.

One version will show all operations like the current inquiry. Useful for planners

The second version will have processing options (operation status=80) and filter them. This will be given to floor users like production supervisors and operators.

Quality Module – Features and Usage

Typical JDE Manufacturing implementations stop with DRP/MRP and Shop Floor transactions. There are companies that started using Quality Module as a pilot phase, but stop after budgets are completed on the main ERP project. Some companies are happy with their lab software tools and resist hard to move towards JDE. But there are enough business reasons to move towards single point data entry and avoid multiple data duplications.

The Quality module in JDE is a recent addition to the applications, compared to MRP and discreet work order processing. It offers very flexible applications and it is highly integrated with sales order & work order transactions.

This document describes the high-level master data requirements and key factors to be considered in the implementation

The pros & cons of the module are listed below:

Pros:

1 Flexible and configurable to any type of industry. The usage goes across food-industry to heavy metal fabrication.

2 Low cost of implementation. Not all applications are required to start the proto-type and these can be added later in the project phases.

3 In a multi-site implementation, ability to share the test-ids and specifications across the plants. How many times you would have heard 'our test specifications are different from other divisions.' Once the user's see the benefits this becomes a negotiating factor with their common vendors.

4 The biggest gain is the integration between quality module to other modules (Address book, Sales order processing, Shipping, Work orders, Shop Floor transactions, Work order completions). The quality test result

entry application can be invoked real-time from these applications.

5 Lot trace/track works better with the integrated data flow between transactions and quality test results capture.

6 Automated NCR (non-conformance reporting) and issue resolutions. This is a very critical requirement for regulated industries.

7 Segregation of duties: Quality Assurance (or Quality Management) can define the test conditions. The quality inspectors or plant-level users are expected to enter the results. They cannot delete the requirements or bypass the values. Any incorrect data entry or failed values will trigger automatic NCR process. The product will not be available for sale or use.

Cons:

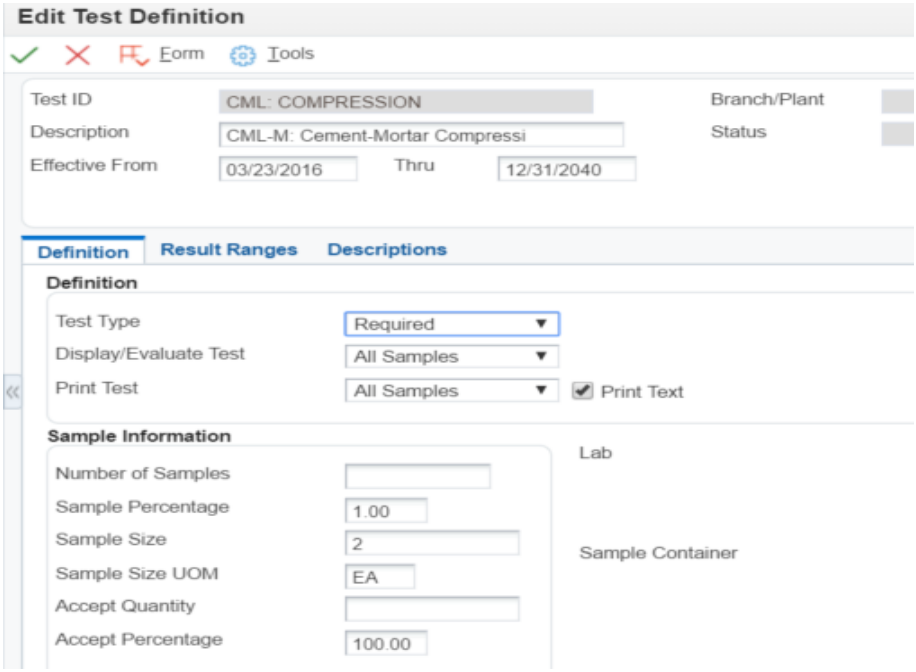
1 There is no Z-file processing for mass master data upload. See following section for custom data upload tools

2 Product certification format is still very generic and require heavy customization.

3 There are no timers in the test result entry. Example: If the test result fail, auto generate another test process based on product requirements.

Basic Applications:

1 Test definitions are must for test result capture. This screen has three tabs

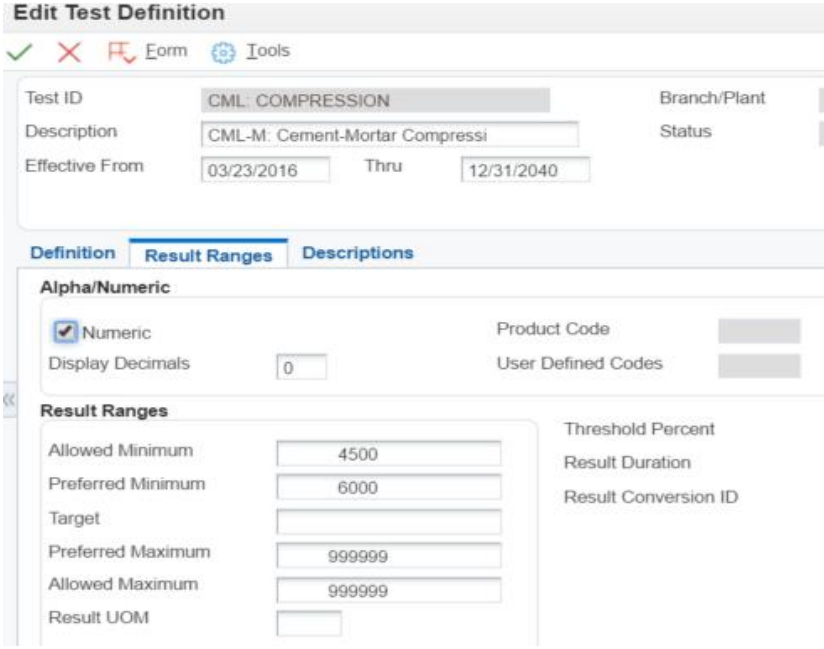


It's better and highly advised to have some naming convention in the Test-ID name. That will help in quick review or finding out duplicates during CRP time period.

You can skip the branch-plant and make it common across multiple branches.

There is a workflow within Quality module where test definitions can go through approval process before it becomes operational.

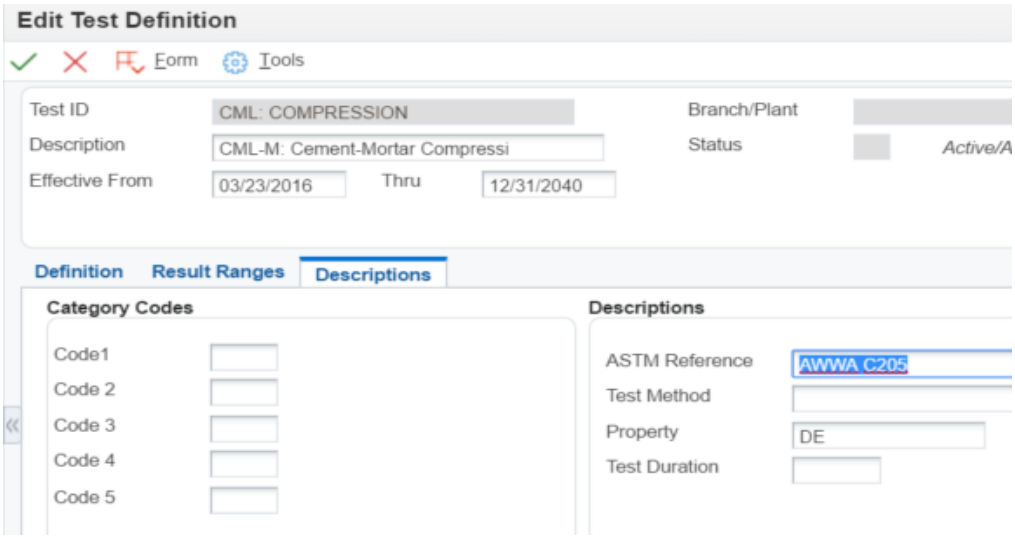
Number of sample (or) sample percentage field is required.



This is a critical tab. You can use Yes/No type of answers. (Not shown in the above example).

Y/N type: You need to configure a UDC (37/CA) and enter Y in the result ranges. This is applicable for test definitions like 'whether CofA (certificate of analysis) received?,' Visual checks, Documentation checks, Signature validation, etc.

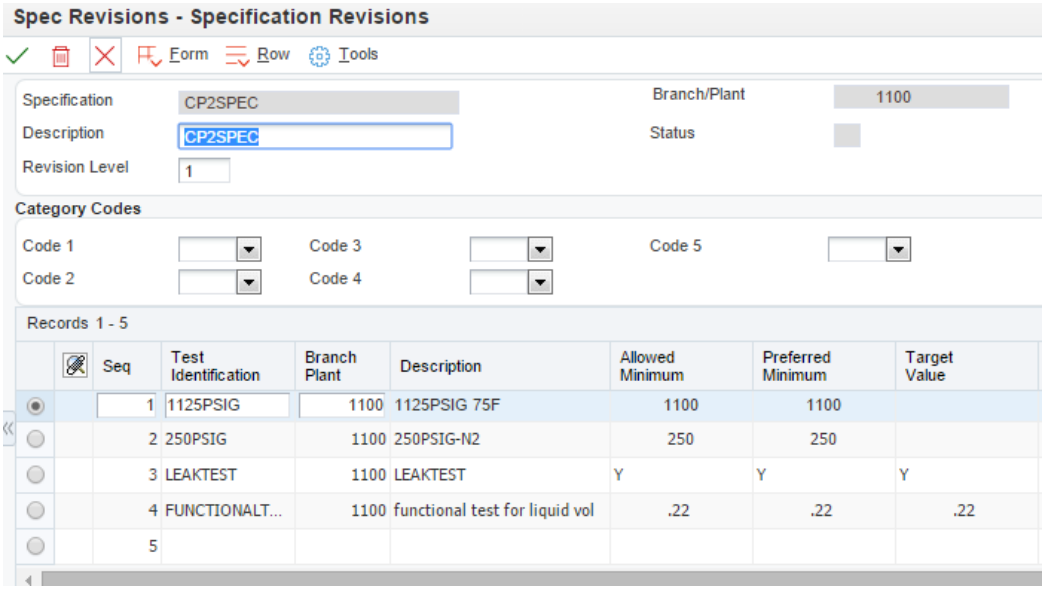
Like in the example above, preferred min/max are outliers and allowed min/max are required ranges.



This tab contains lot of static values (UDC driven) for reporting and analysis. Fields under Descriptions are useful for Quality managers to refer to industry specifications (which can also be printed in certifications). Test duration is a static value in minutes. There are customizations where this value is used to re-generate test definitions after that time duration. Example: Product going through stabilization or curing, need to be tested every two hours if the first test fails in any parameters.

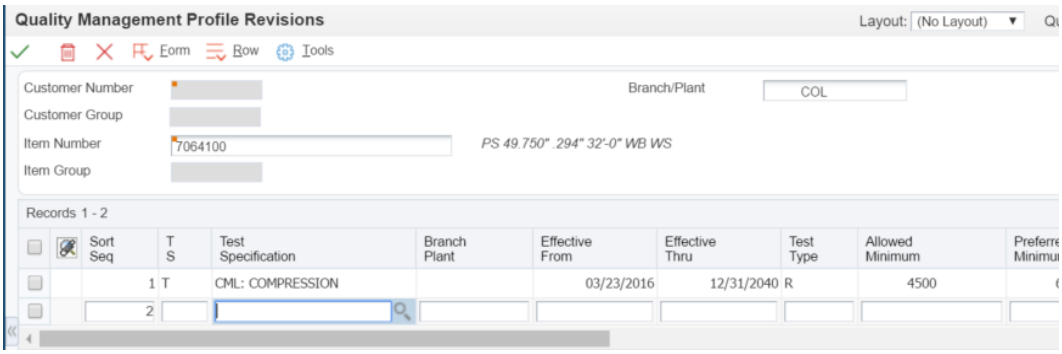
2 Test Specifications are optional. Some companies like to group test definitions into a single specification. This will help in better review of product

specifications, especially if they are maintained at the customer level.



Here also naming of the specification need to be logical. You can identify the set of test definitions and change the threshold values under this specification. You could define specifications based on customer levels. A proto-type product can have broader spec which can later be enhanced to stricter specification. There is also Quality revision level attached to specifications.

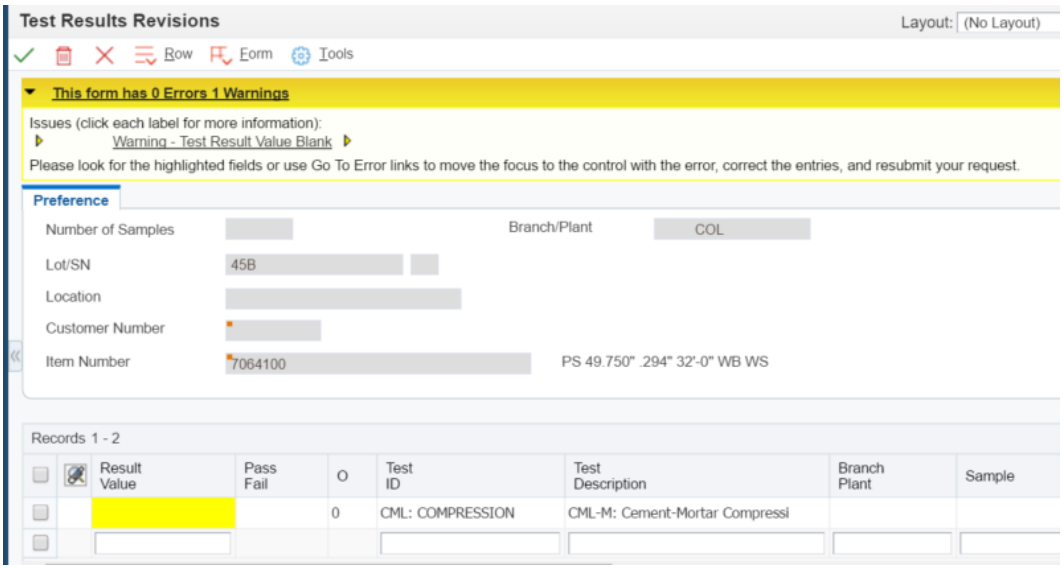
3 Quality profile. This application holds what products (items) are required to be tested. This is a one-time configuration.



This is the final step in master data, where you will associate the product to either a spec or test-definitions. Or a mix of both basic specification and advanced test-definitions. (Field TS decides whether this is a spec or test).

The above example shows one line, but we have seen like 15 to 50 lines based on product complexity.

4 Test Result Entry



This application can be invoked during WO completions. But in reality, the quality personnel are not near the workcenter where the final completion happens. So, this application can be used as stand-alone data entry. Please ensure the WO status & lot status codes are configured so that product does not goes into stock without testing.

In the above screen, user can enter data known at that point time and save. He or She can come back later to complete the transaction. Also, the

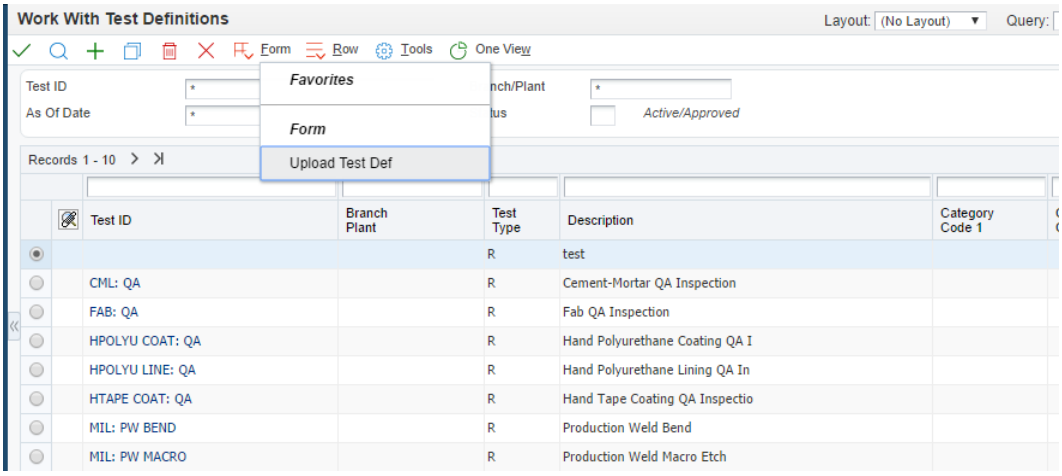
test IDs can be copied again for re-testing. There is a userid, date & time stamp visible on the rows. (not shown above).

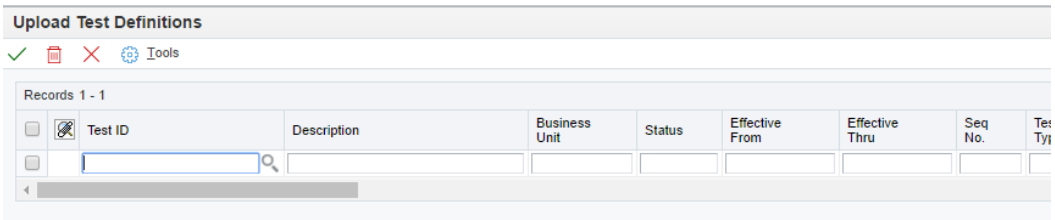
If the user enters incorrect values, system will show FAIL as a result. User can edit it to the correct value. If the actual result is a failed test, then the product goes on NCR hold. There is a separate application to process and clear the holds.

Appendix-1

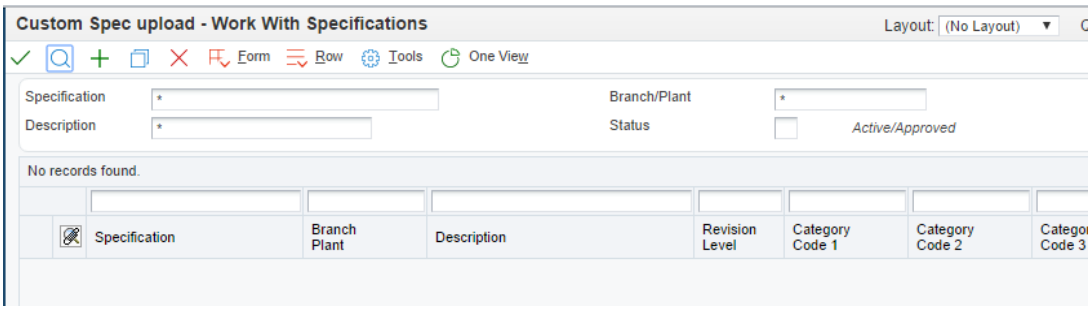
The module does not have mass upload capabilities. Companies need to hire interns to organize data from documents and enter them manually. A custom upload tool (power forms) will help better to get the source data in excel files and upload them quickly.

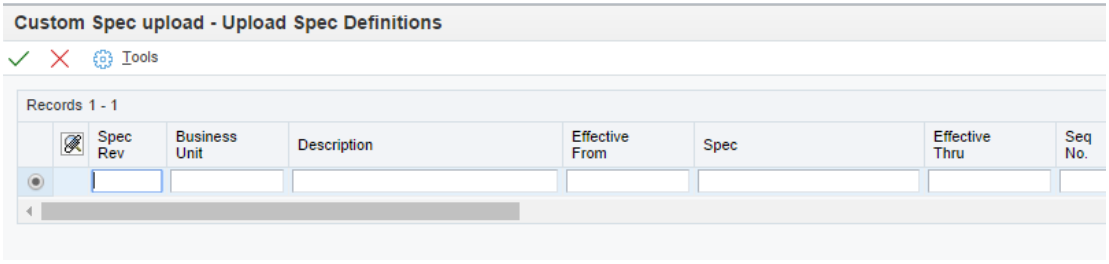
Step 1 You will need upload capability in Test Definitions application

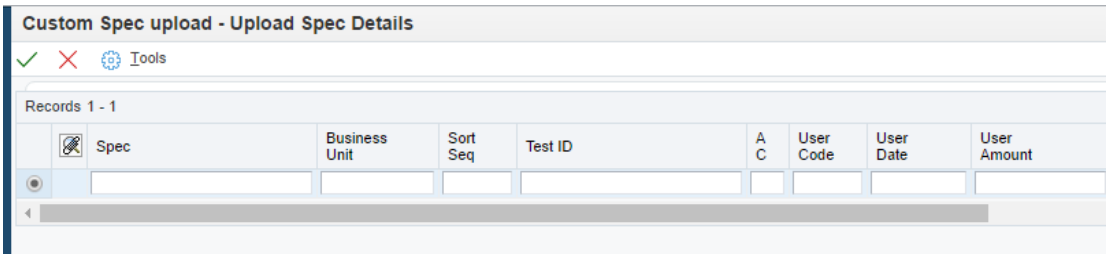




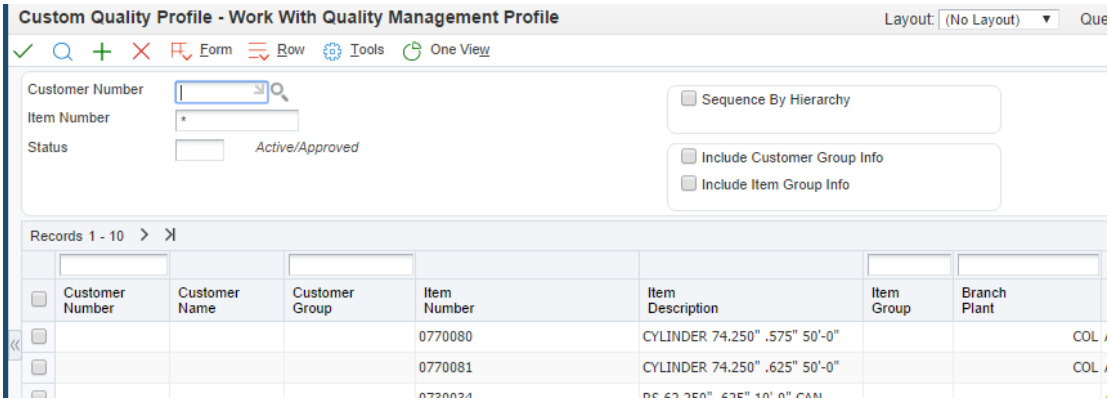
Step 2 You need upload capability at Specifications application. The data is stored in two tables and hence you need two uploads

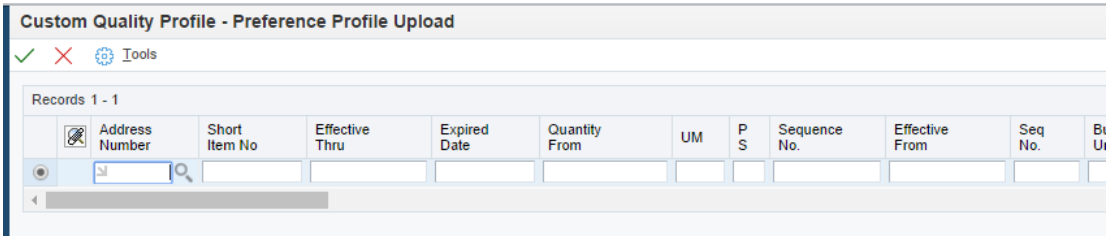






Step 3 Upload on quality profile, where products & spec/test-ids are associated.


Custom Quality Profile - Work With Quality Management Profile
Layout: (No Layout)
Form
Row
Tools
One View
Customer Number
Item Number
Status
Active/Approved
Sequence By Hierarchy
Include Customer Group Info
Include Item Group Info
Records 1 - 10
Customer Number
Customer Name
Customer Group
Item Number
Item Description
Item Group
Branch Plant
0770080
CYLINDER 74.250" .575" 50'-0"
0770081
CYLINDER 74.250" .625" 50'-0"


Custom Quality Profile - Preference Profile Upload
Tools
Records 1 - 1
Address Number
Short Item No
Effective Thru
Expired Date
Quantity From
UM
P S
Sequence No.
Effective From
Seq No.

E1 9.1 Top 10 processing options you wish you knew few months back!

Editor's Note:

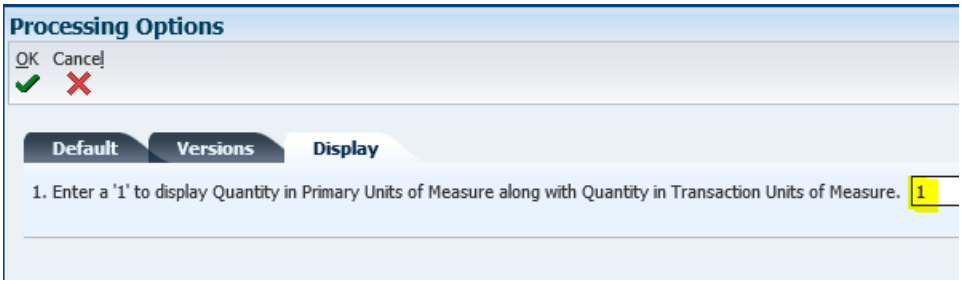
JD Edwards' EnterpriseOne manufacturing has built its reputation over the years for its ease of use, flexible configurations, and adoption in process/discrete manufacturing environments. As we move into the world of complex global manufacturing and distribution channels, JDE as an ERP platform has helpful functionality built into its core manufacturing suite of applications.

Release 9.0 and above has more features to help manufacturing users to fine-tune their systems and adopt these application across the organization. In this article, Matt Ravikumar takes a look at top 10 processing options and explains its usage in a manufacturing business environment.

The functionality specified in this article is applicable from JDE EnterpriseOne 9.0 onwards.

1 P4111 Item Ledger (Cardex)

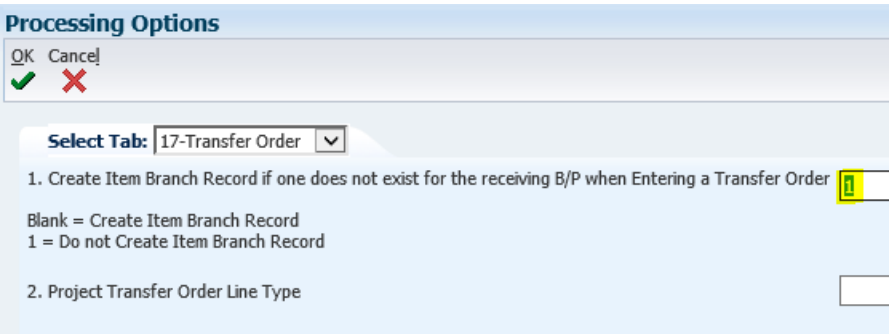
If you are using multiple units of measures for purchasing, sales order processing and work order processing, the basic cardex ledger shows the 'transaction unit of measure' on the line details. Users need to compare the quantities in primary unit of measure and by default this is not shown in the ledger inquiry screens. The processing option (see below) let you display both the uoms. This is also helpful when primary uom measure gets changed for items (Not ideal business process, but the need to change primary do come up often).



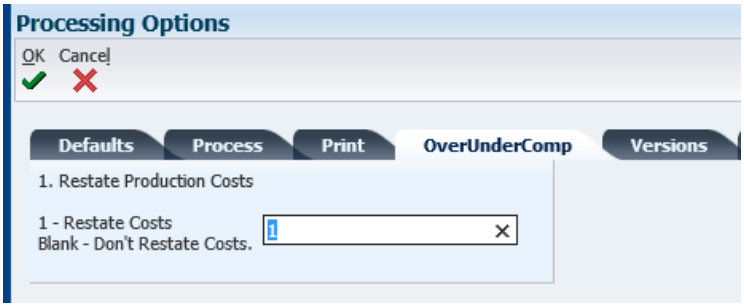
2 P4310 Purchase order entry

Typical sales order entry application in JDE allows item branch records created in the other side of transactions like OK or OT orders. If your business environment need is to control item branch records in certain branches and not open for back-end additions, you have to turn off the process. This is important for the ST/OT and SK/OK type of transactions

where users can transfer materials even without the item branch records. This pose accounting problems since the costs are not yet set in the receiving branch. The best practice is to lock them from transferring to any branch and wait for product data management to fix the item branch records.



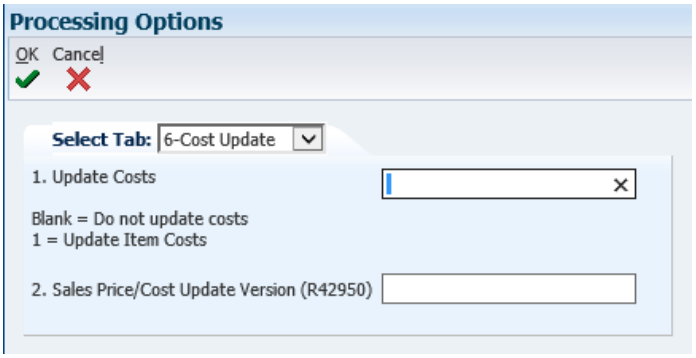
3 R31804 Manufacturing accounting



Use this processing option to specify whether to restate the costs. This eliminates variances that are caused by over or under completions or scrapped end items. Very ideal in process environments where production batches gets completed in short. This processing option helps to reset the accounting to the completed quantity and not the ordered

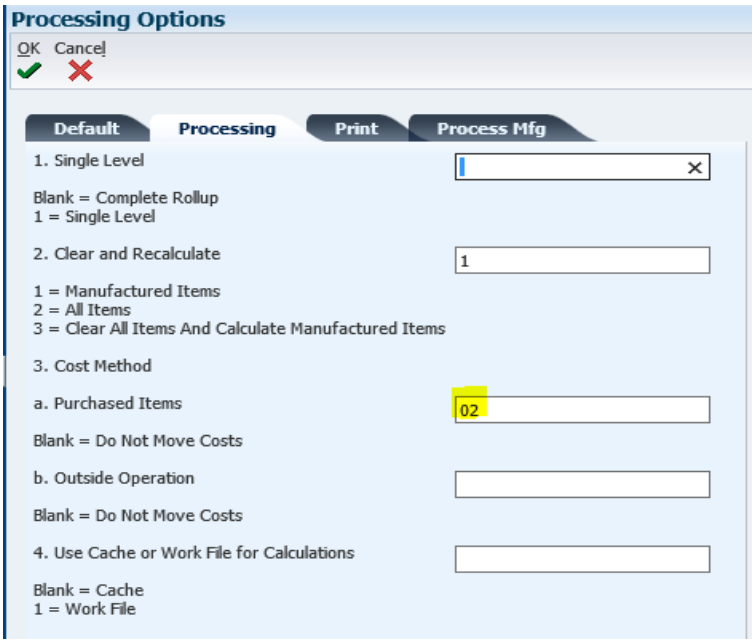
quantity.

4 R42800 Sales update



Every company in every industry has open sales orders in the system based on their product lead times. The product costs get changed monthly or quarterly period based on management directives to keep the costs current and for internal/external financial reporting. The sales repost (also known as cost update) versions are scheduled to run very frequently on a separate sleeper thread. These could take additional system resources and also give re-scheduling problems when system is down for maintenance. Sales update R42800 has its own processing option to configure this execution thus eliminating the need to run sales repost separately.

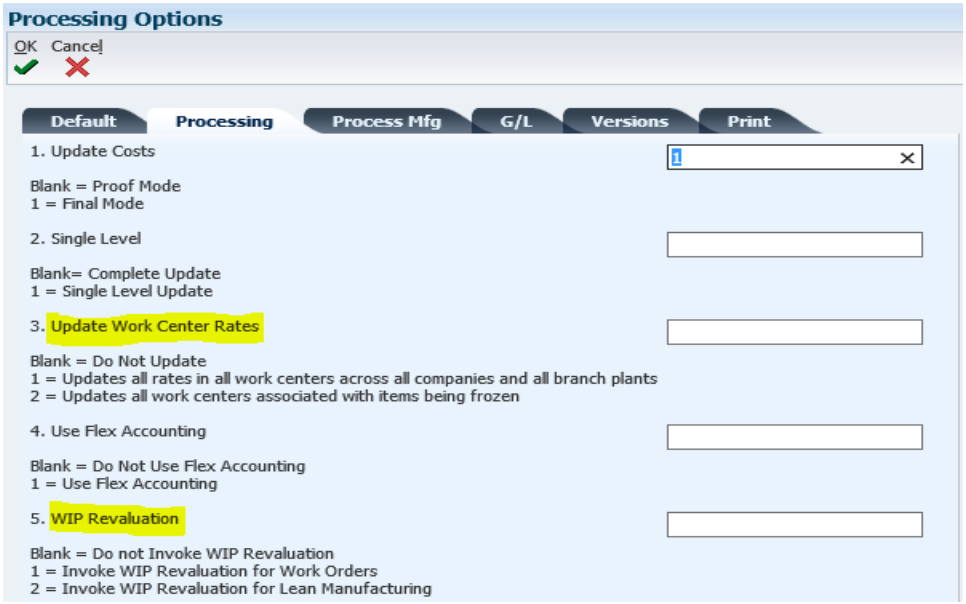
5 R30812 Cost simulation



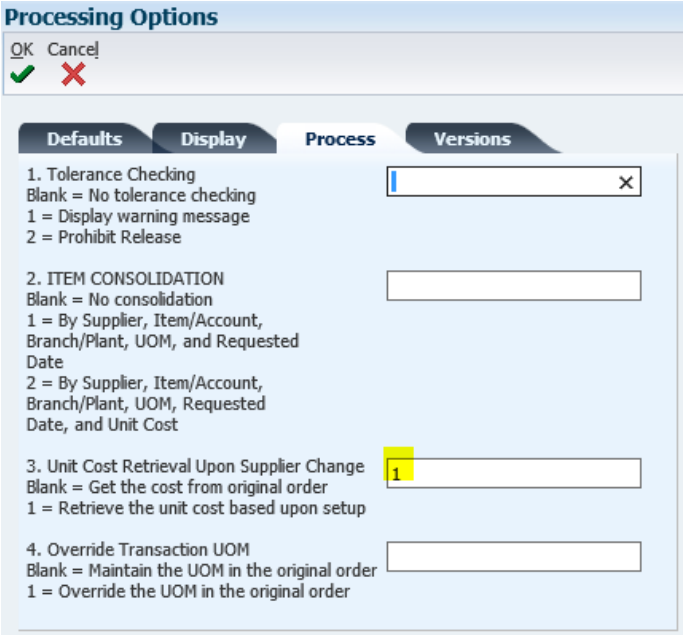
6 R30835 Cost Freeze

WIP revaluation is a key functionality for discrete industry, where the stock sitting in the shop-floor need to be revalued for cost changes. Users can do this during the product cost freeze process itself instead of waiting for the work-orders to be completed. WIP revaluation in R30835 generates the journal entries based on the setups. There is another processing option to freeze the work-rates during cost freeze. There are instances when the users change simulated work-center rates and forgot to freeze them. The processing

option in cost freeze ensure work center rate freeze also happen at the same time!.

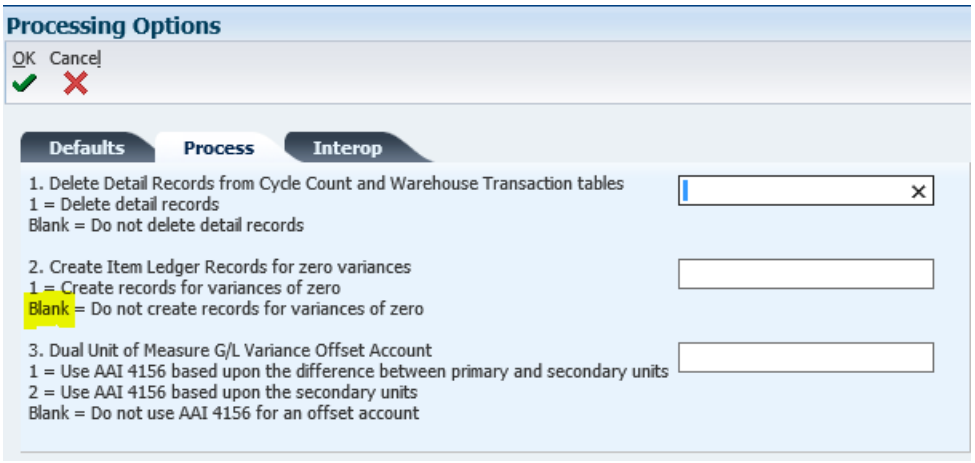


7 P43060 Convert requisitions into purchase orders



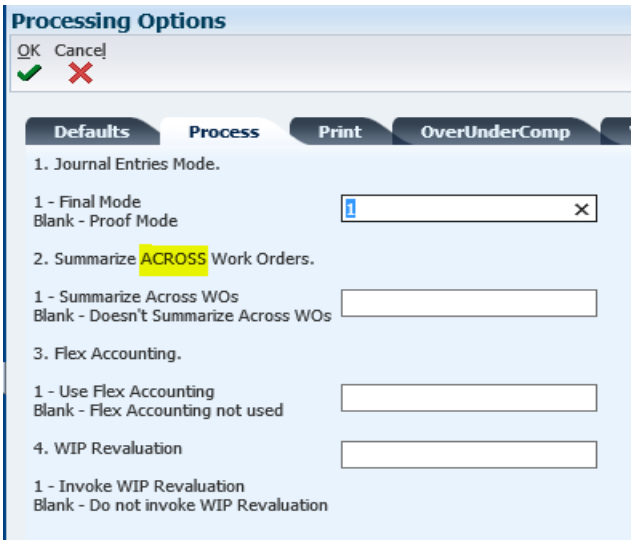
When requestors generate purchase requisitions (PR) they select a default vendor. When the PR is routed to buyers, there could be price changes or competitive vendor available for the product. The processing option 'unit cost retrieval upon supplier change' helps buyers from manual keying in values and let the system get the data.

8 R41413 cycle count update



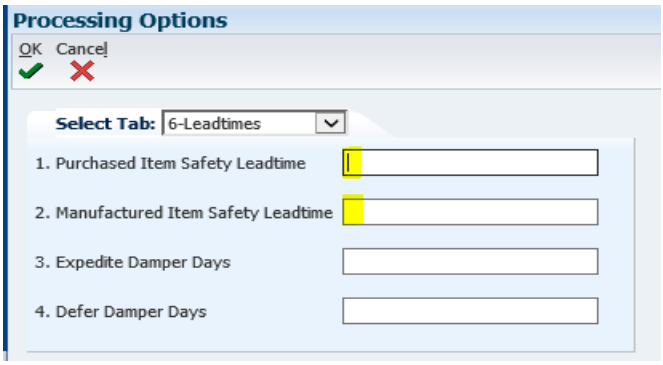
One of the most popular applications for manufacturing and accounting is the item ledger (cardex). Users like to have minimal entries for better query performance. Having blank in the processing options for cycle count update eliminate the zero IZ records in the cardex.

9 R31804 Variance Report



Does your accounting wants variance journal entries at each work order level, thereby increasing the F0911 records? The answer is no since F0911 records grow fast and reporting/analysis becomes time consuming even for the best tools in the market. Also, the variance entries are generated on weekly or monthly basis and hence using summarize option helps to reduce the number of records in 911 table.

10 R3483 DRP/MRP batch



Planners and buyers always have the question of whether we can build additional buffer lead times based on current economic conditions. The answer to the question without revising all individual product lead times is to use lead-time processing option in the MRP batch. The values

(in days) add the buffer to each of the

products/components. This is at the version level

and hence user may need to split the MRP

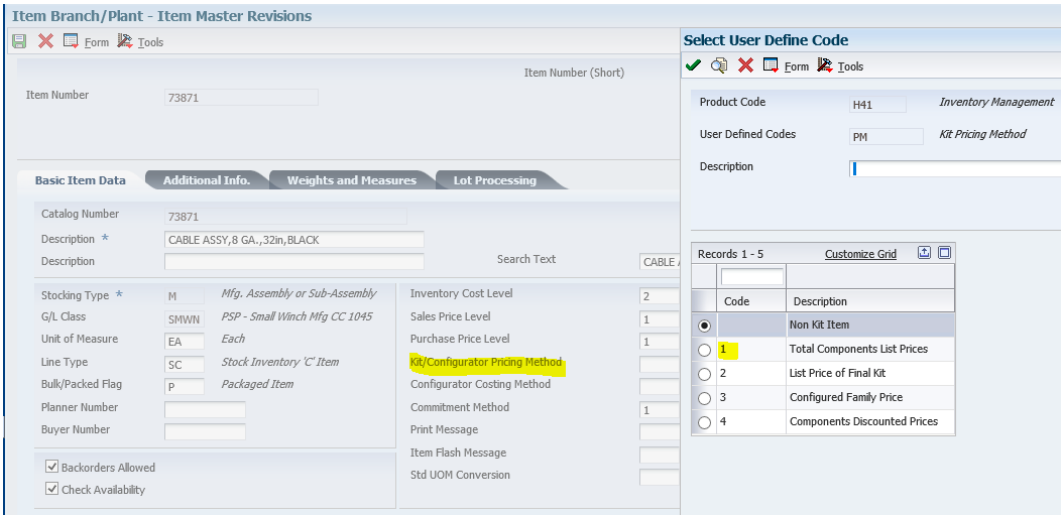
versions to certain product group levels. If you

run MRP as one batch this will impact all products

and that may not be the ideal solution.

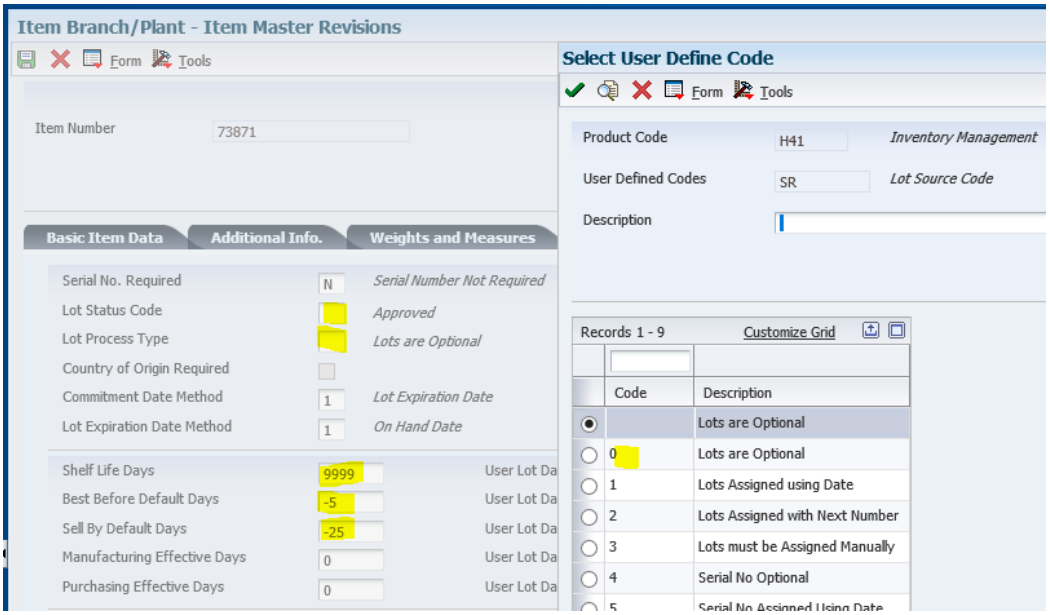
Stocking type K for kits

If you are using kits (stocking type K), there is a specific field in item master (not in item branch) which controls on the pricing of the products. The values 1 or 2 also dictates how the price is calculated on the sales orders. This value is stored only item master- F4101 table.

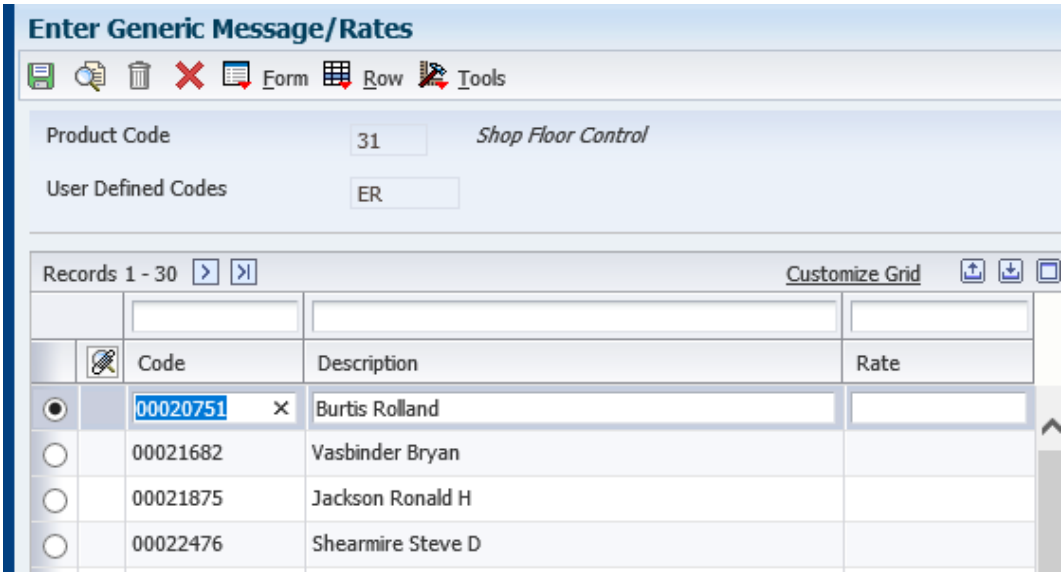


Lot vs non-lot-controlled items

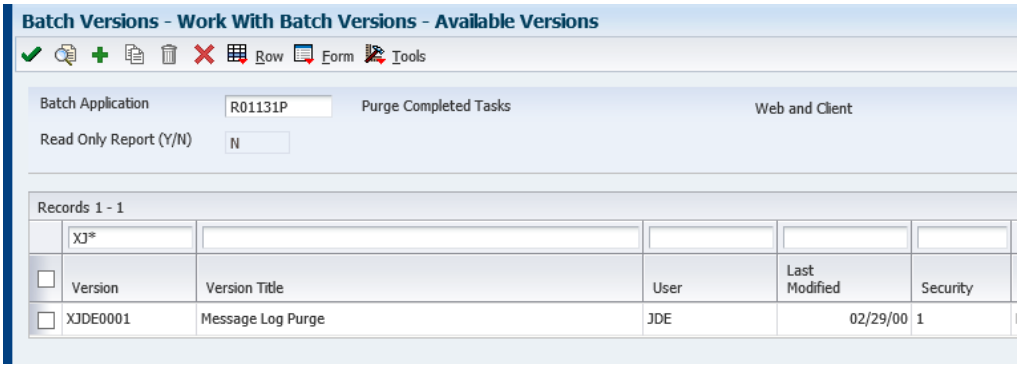
In a non-lot-controlled environment, it may be okay to use lot process type as ‘blank.’
But in a lot controlled environment, if there are products/items that are not lot-controlled, JDE suggests to use 0-lots are optional instead of blanks. This will ensure lot tracking to work seamlessly across the product hierarchy.
It has been reported that using blank in lot-controlled products break the trace/track functionality and the continuity is lost in inventory or workorder transactions.

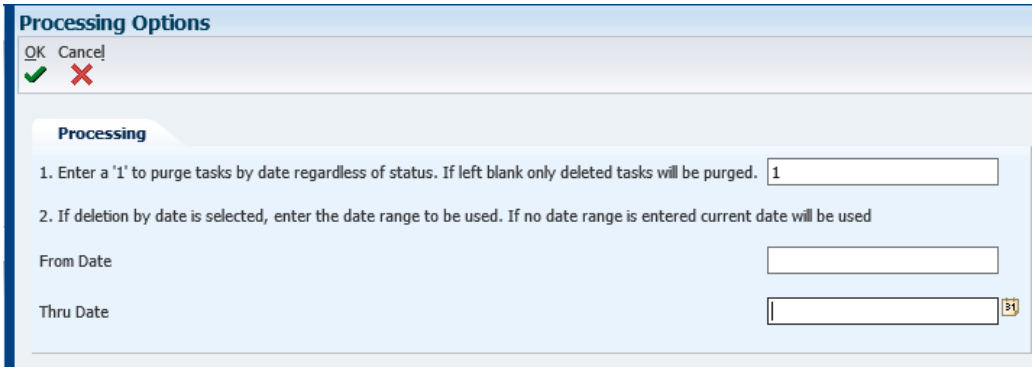


Employee Address-Book for time entry
Employee address book numbers in super-backflush process and/or time entry.
You need to enter/maintain this 31/ER UDC after creating address book records.
System may insist preceding zeros if the configuration length is 8 numeric.
This configuration is maintained in the Form exit. You may need it to align with AB# on new implementations but do not change this configuration mid-stream in a live environment
This rate is not linked to payroll. There are clients who like to keep different rates in this table and suppress the view on the individual time entry application. That helps help to compare the productivity of the experience personnel vs new-hires.

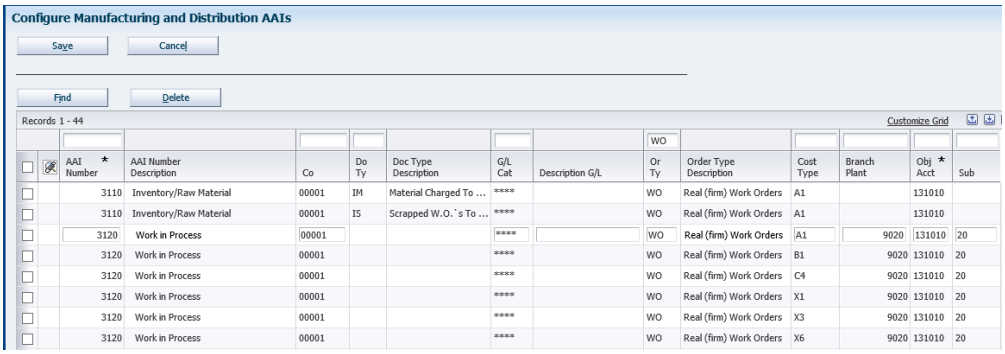


Purging Workcenter messages
As a power user or business analyst, you review message logs in Work Center. Many times, it gets over crowded with genuine or informational messages. And you have time or patience to clear them one by one. If you have access to BV, you can run the purge job for your address book number quickly.



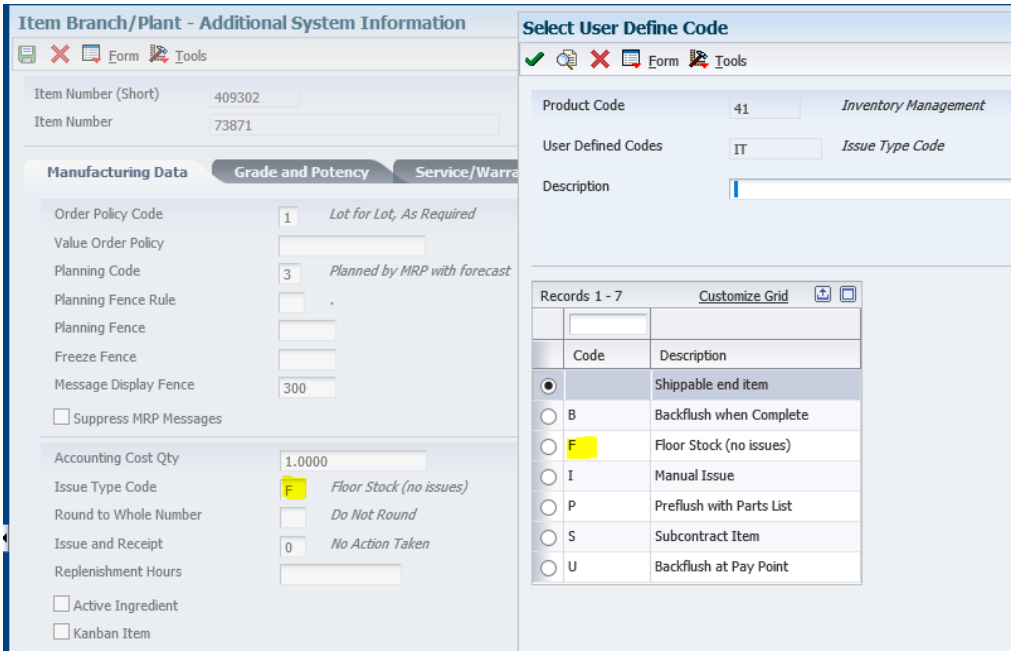


Mass update of DMAAIs
One of the hidden treasure in the E1 system!
DMAAI update or maintenance is very time consuming and you cannot see the total picture from P4095 application.
This P01RS950 is very user-friendly but very risky too. You can edit the content quickly and save it. Press find to see your changes immediately. I would export all the data upfront and keep it as a starting point reference.
P01RS950

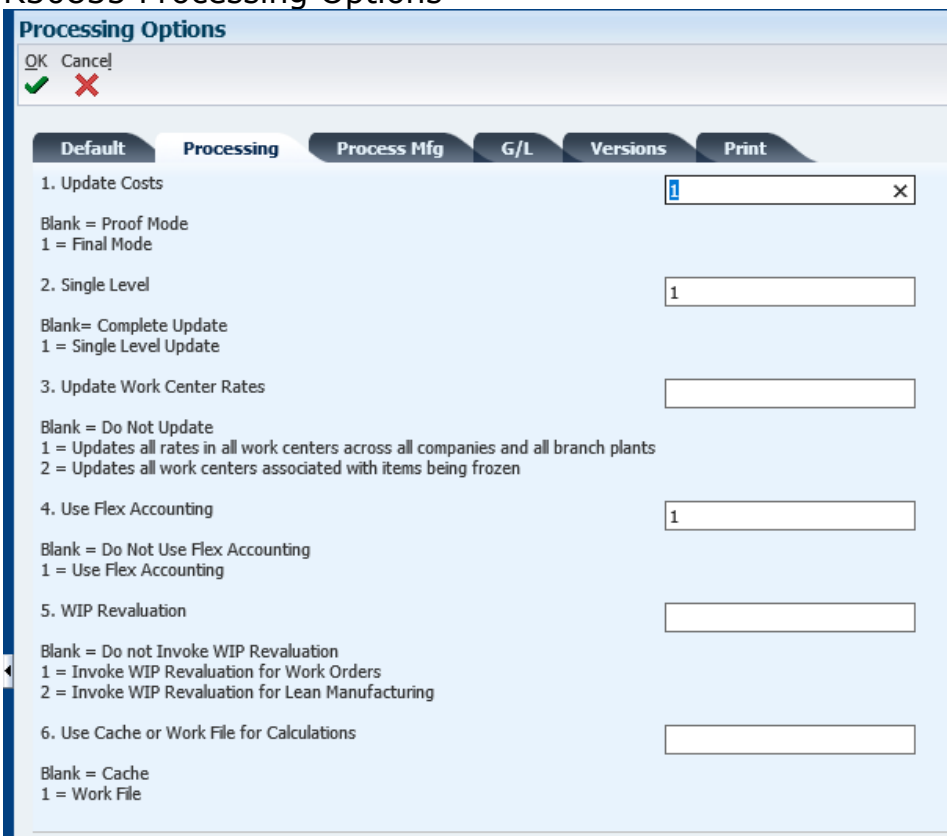


AAI Number *	AAI Number Description	Co	Do Ty	Doc Type Description	G/L Cat	Description G/L	Or Ty	Order Type Description	Cost Type	Branch Plant	Obj Acct *	Sub
							WO					
3110	Inventory/Raw Material	00001	IM	Material Charged To ...	****		WO	Real (firm) Work Orders	A1		131010	
3110	Inventory/Raw Material	00001	IS	Scrapped W.O.`s To ...	****		WO	Real (firm) Work Orders	A1		131010	
3120	Work in Process	00001			****		WO	Real (firm) Work Orders	A1	9020	131010	20
3120	Work in Process	00001			****		WO	Real (firm) Work Orders	B1	9020	131010	20
3120	Work in Process	00001			****		WO	Real (firm) Work Orders	C4	9020	131010	20
3120	Work in Process	00001			****		WO	Real (firm) Work Orders	X1	9020	131010	20
3120	Work in Process	00001			****		WO	Real (firm) Work Orders	X3	9020	131010	20
3120	Work in Process	00001			****		WO	Real (firm) Work Orders	X6	9020	131010	20

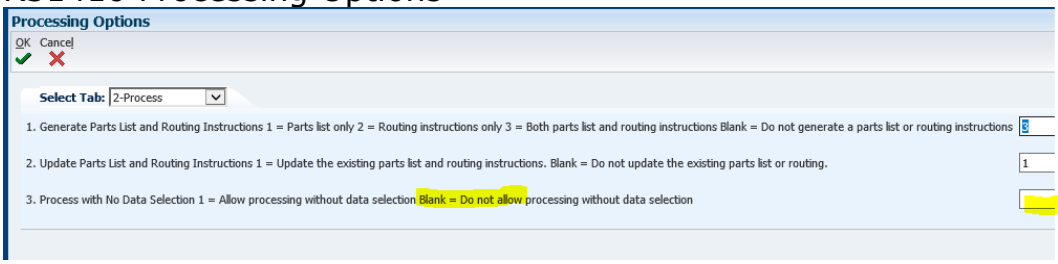
Floor stock in manufacturing operations
Issue type= Floor stock (F)
One of the often missed feature in E1. Companies keep literature items, guides, tools, etc. in the bill of materials for the costing purposes and, they want to be shown in the workorder partslist. But these are commodity type items and no issued physically in the manufacturing process. Most of the time, these are expensed items. Instead of making fake issues and/or adjusting negative inventory periodically, the best practice is to make them floor stock.
WO super backflush will not prompt for material issues so there are no unwanted cardex entries. No need to correct the negative inventory for such items



Freezing Work Center rates before Cost rollups
JDE suggests freezing workcenter rates before cost rollups. Many times, cost accountants forget to do that after making changes to simulated rates for the work centers. The catch-all at the R30835 processing option to update work center rates will do the same job for you behind the scenes.
R30835 Processing Options

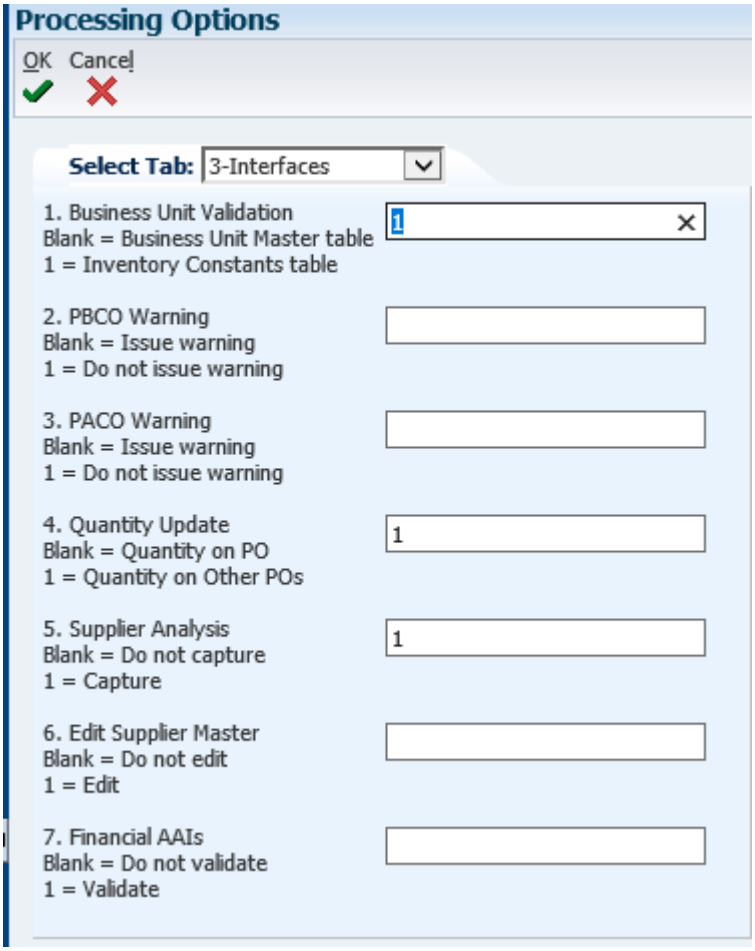


Stop re-opening workorders by user(s)
If you are a consultant, you would have seen multiple times when planner or shop-floor user ran R31410 (Attach parts list/routing) wide open removing all data selection and/or making incorrect data selection values. Even with DS security, one user entered doc#>1 in her batch job to open up all the work-orders in the system on a Friday evening.
But there is a new processing option control to limit people from deleting the data selection rows. Ensure you have not granted processing option prompt for this UBE at the user level roles
R31410 Processing Options

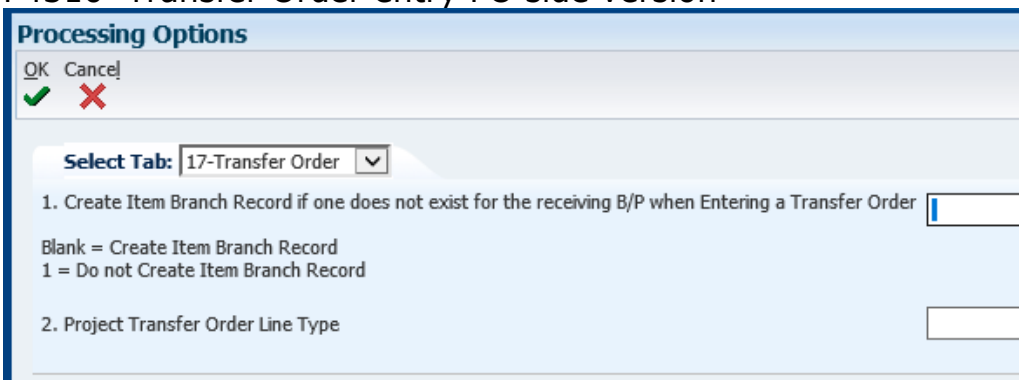


Using Blanket purchase orders
Generating blanket orders and releasing purchase orders from the blanket could be done as a stand-alone basis (OR) from the MRP message processing. The field 4. Quantity update on the P4310 processing option on the blanket order version is critical to make the entire process work seamlessly.
In many implementations, companies stop after regular purchase order transactions. The purchase orders for outside operations, volume discounts, releasing PO from blankets, PO Generation tool (not MRP) are often not implemented due to lack of time & resources.

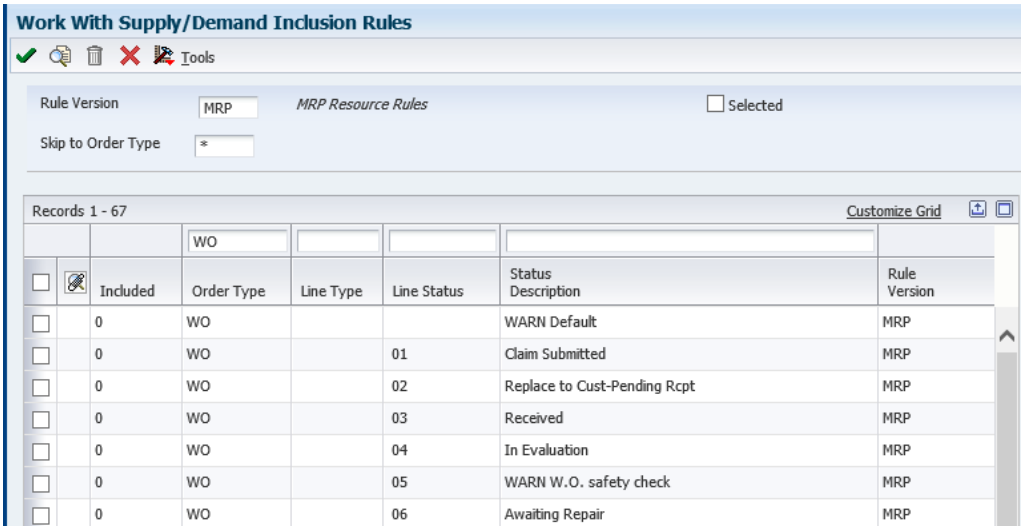
P4310 – Blanket order version

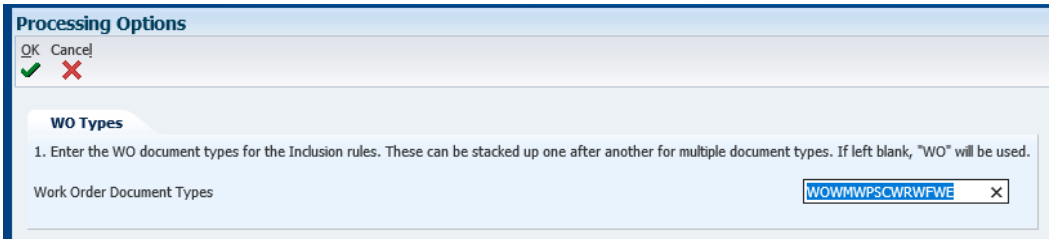


Auto generate item branch record in ST/OT
ST/OT process. If you don't want unwarranted material movements within a plant, there is a processing option on the P4310 side which decides whether to create a new item branch record if one does not exist. I have seen companies turning this to '1-do not create item branch record' and give error to the person moving materials from one branch to another. This can control products/items moved into unnecessary branches impacting cycle count and costing issues.
P4310 Transfer Order entry PO side version



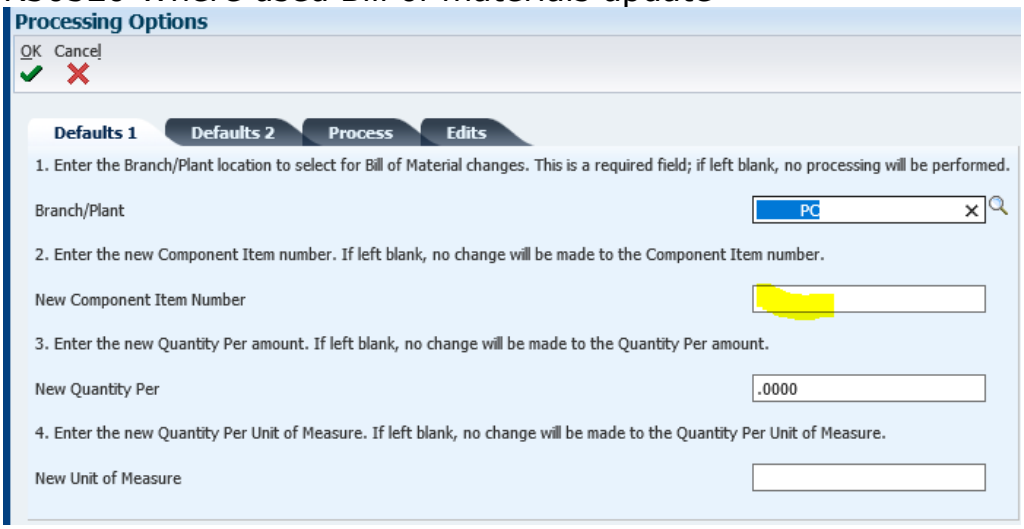
S&D inclusion rules for workorder types
If your system has multiple work-order types under manufacturing process (like WO,WR,WE,WM) you may get error when entering S&D inclusion rules. There is a one-field processing option in the version which decides what order types are valid. This field is maintained without any commas.

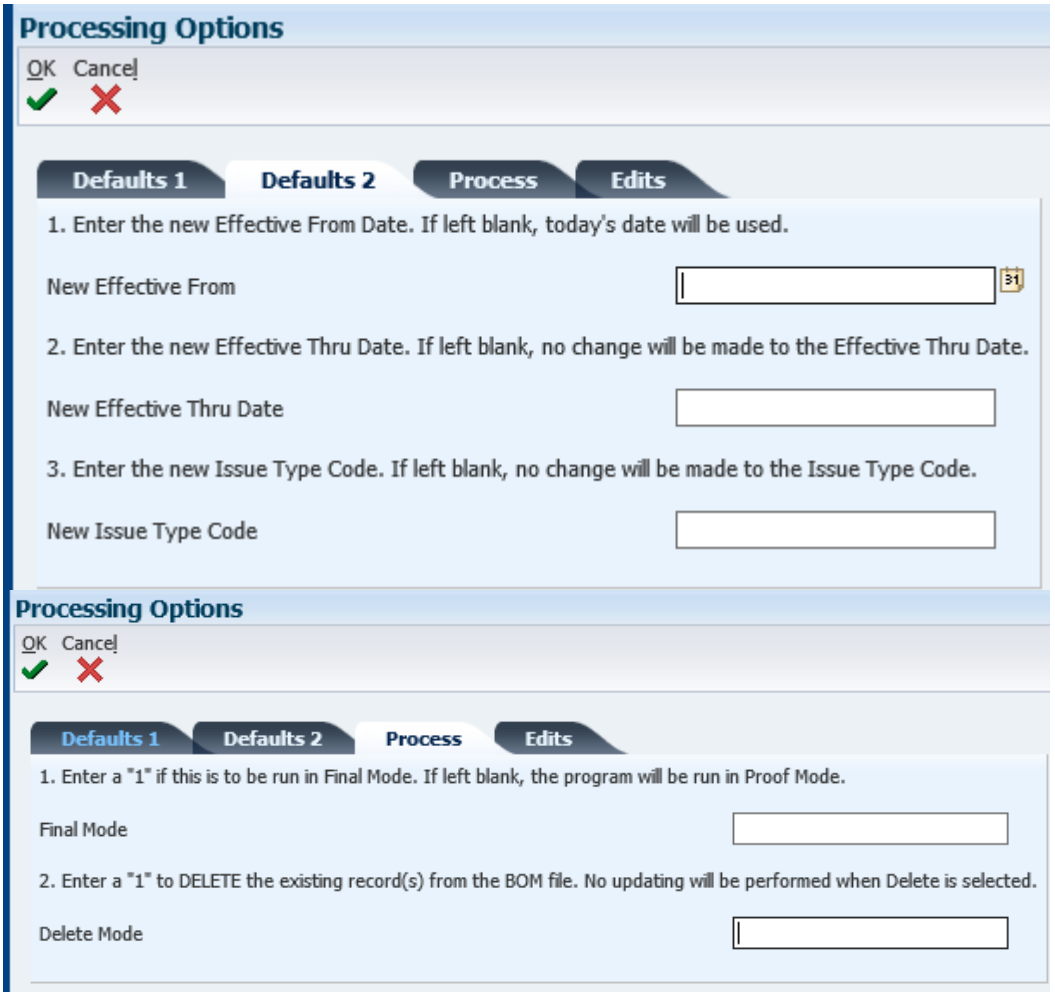


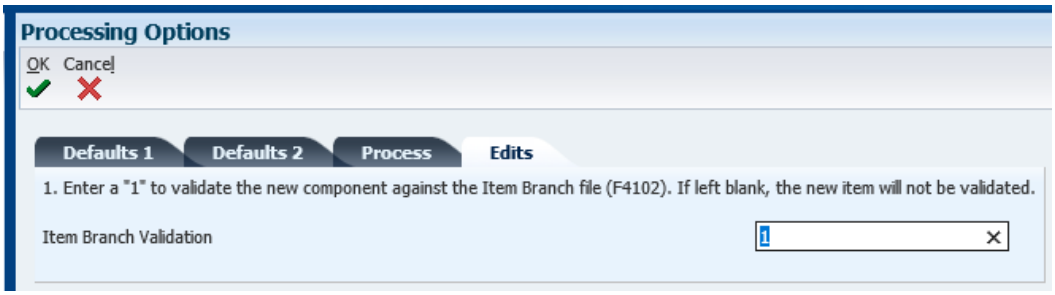


Auto replace of components in bill of materials.

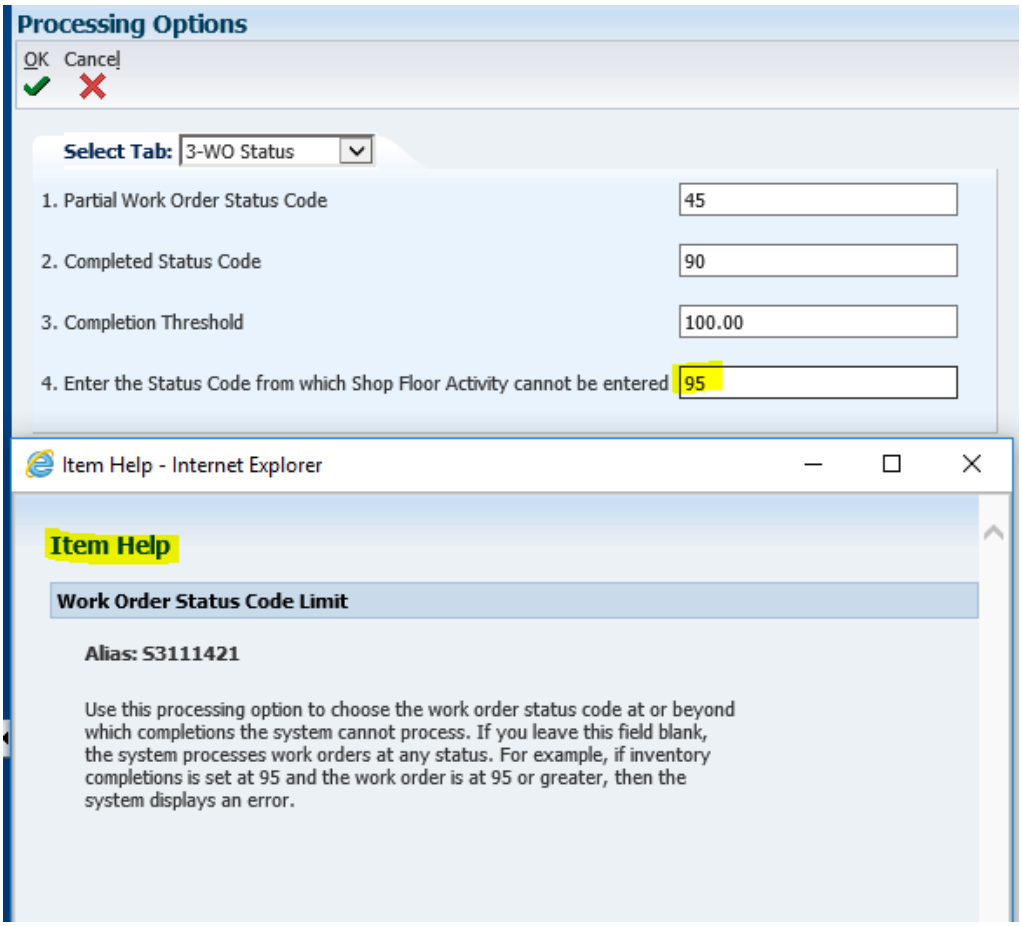
In a manufacturing business, where bills of materials go through constant changes and universal replacements, there is a very powerful UBE which can make this activity very simple.
If you replacing comp1 of quantity of 1 with comp2 with quantity of 2 across multiple bills, the UBE will update the bills in PROOF and FINAL mode. Comp1 will get previous effective end-date and Comp2 will be made active. These is also an option to remove Comp1 altogether if the business wants that way.
As usual, this has to be tested by user in non-production environment first and security granted only to certain roles.
R30520 Where used Bill of materials update




Processing Options
OK Cancel
Defaults 1
Defaults 2
Process
Edits
1. Enter the new Effective From Date. If left blank, today's date will be used.
New Effective From
2. Enter the new Effective Thru Date. If left blank, no change will be made to the Effective Thru Date.
New Effective Thru Date
3. Enter the new Issue Type Code. If left blank, no change will be made to the Issue Type Code.
New Issue Type Code
Processing Options
OK Cancel
Defaults 1
Defaults 2
Process
Edits
1. Enter a "1" if this is to be run in Final Mode. If left blank, the program will be run in Proof Mode.
Final Mode
2. Enter a "1" to DELETE the existing record(s) from the BOM file. No updating will be performed when Delete is selected.
Delete Mode

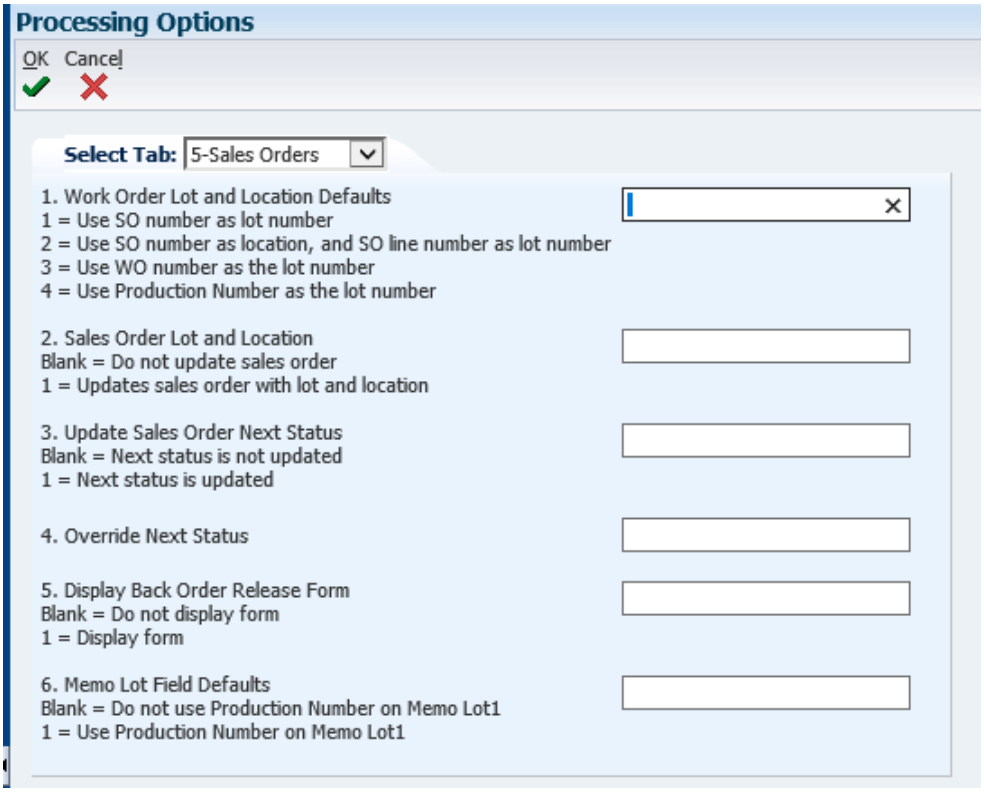

Processing Options
OK Cancel
Defaults 1
Defaults 2
Process
Edits
1. Enter a "1" to validate the new component against the Item Branch file (F4102). If left blank, the new item will not be validated.
Item Branch Validation
1

Locking Work order transaction after certain WO status.
In discrete workorder based manufacturing operations, users will come back with additional changes to material issues and/or labor AFTER workorder hits 95 (as an example). Or some times when the WO is at 96 or 97 status.
The best practice is to control them from entering any date by this processing option. Users will get error while trying to complete any transaction after certain point in the WO steps.
P31114 processing option

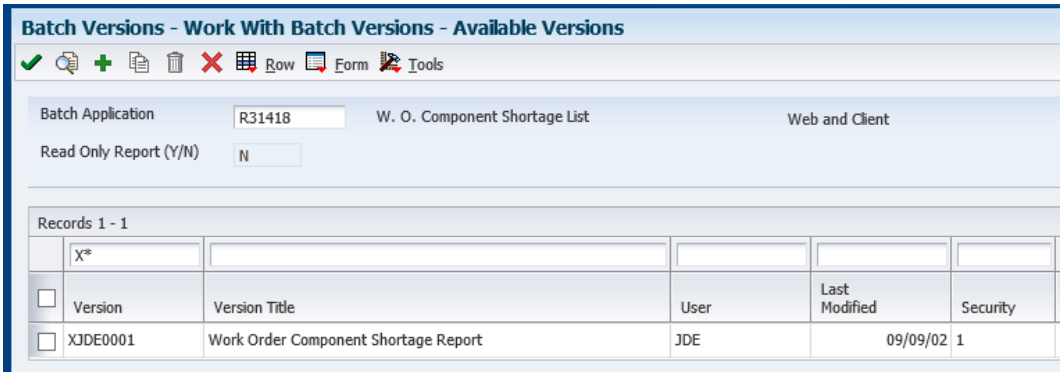


Linking Sales orders to Workorders
The most powerful and at the same time risky processing option on WO completions.
If you have sales orders creating work orders (line type W), work order completion can update the sales order status automatically. In a lot controlled environment it can even commit the location/lot to the sales order.
While this works perfected in full completion WO process, partial completion pose dangers of sales order status code accuracy. Also, if CSR has capability to re-prioritize and re-commit sales orders from another lot/location, completing the original workorder will mess up the sales order status codes. If the sales order has moved past 580, system will through error. If the sales order is among valid status codes, WO completing will automatically update the SO status putting distribution in confused state!

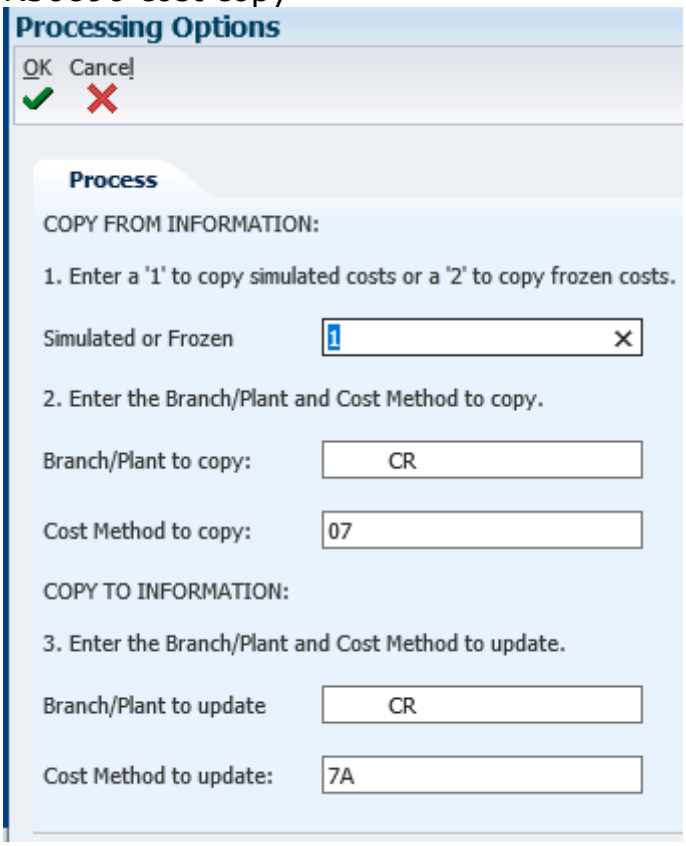
P31114 WO completions



Generate Work order Shortage at anytime
The standard shortage report R31418 is generated along with R31410-Attach partslist and routing. But planners would like to know the shortages are more frequent levels. This is more applicable where you attach partslist and routing irrespective of the shortages to keep the production floor busy.
You can run this report stand-alone manually or in the scheduler with data selection of WO status code at range like >=40 and <=92. These status code depends on your specific WO configurations
This report gives all shortages against each workorders and also a summary of the item-level shortages on the last page(s).

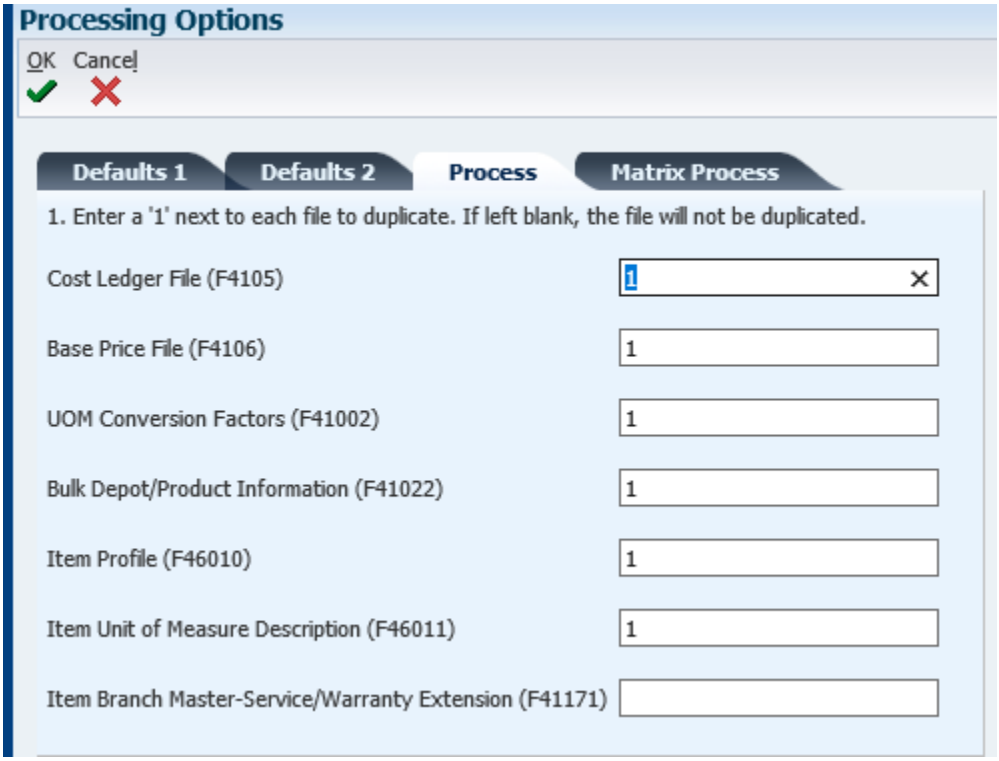


Copying cost from one branch to another
R30890 cost copy



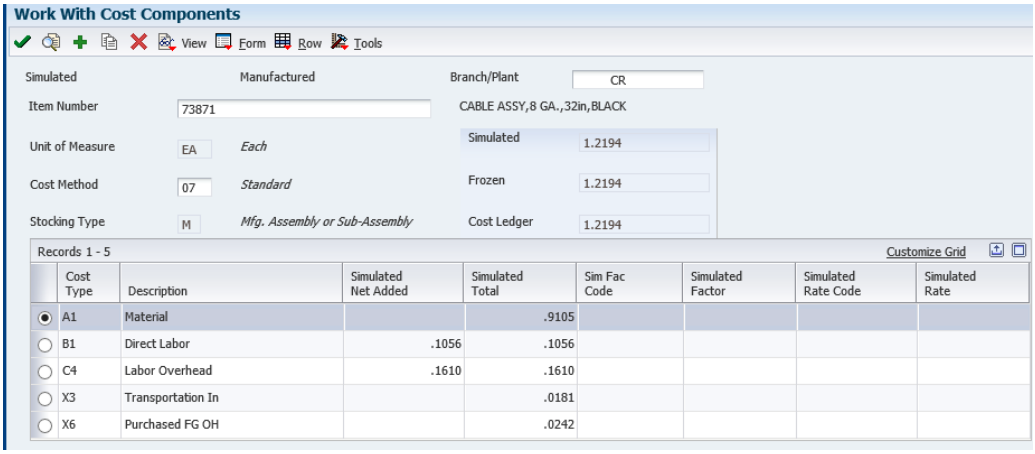
In a multi-branch manufacturing environment, this is a very powerful UBE to copy costs. User(s) trained with hands-on execution of the reports, preferable with a sample data set.
If you have virtual branch plants to complete service or non-manufacturing activities, you may copy frozen costs from the source plant to destination branch.
In a DRP environment, you will simulate & freeze the cost in the main manufacturing plant (where bills and routings are maintained). You will then copy the simulated cost to DRP branches. You will complete cost freeze at those DRP branches separately to get the inventory impact.
This batches creates records in F30026 table and NOT in F4105 table. If you need to copy costs in F4105 table directly (in different cost method) there are two options. You may configure new cost method and run this batch program. Or, using Z-file processor for F4105 to cut and paste the different cost methods for historical analysis and reference in that table

Creating item branches copy ASAP
R41826 ITEM BRANCH COPY



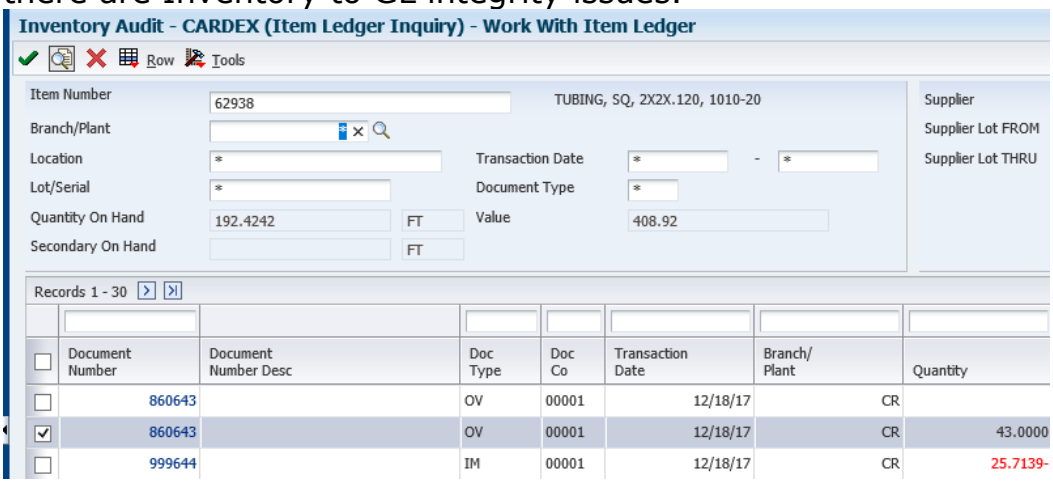
Very powerful tool to copy item branch records from one branch to multiple branches. If the record does not exist in the destination branch this batch will create one. We have seen this on scheduler nightly to keep adding new parts into other branches from the main branch plant.

Adding new lines to cost components
P30026 COST COMPONENTS

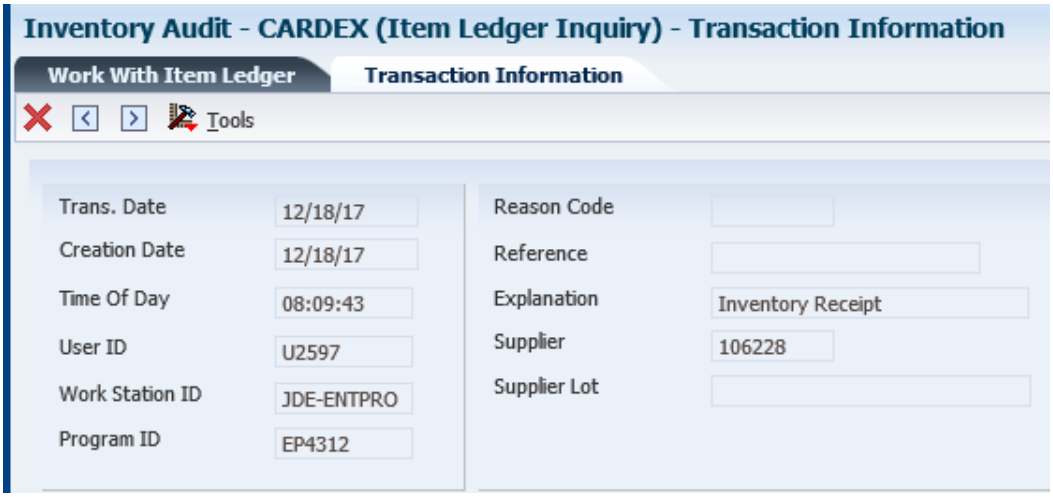


Cost accountant love to maintain X-costs but will stay back when the manual data maintenance is involved.
A simple custom UBE can make entries into the F30026 table for X* cost types with factors. (Use processing options to enable multiple cost types).
The UBE can run only for purchased items (stocking type=P) to build-up the additional costs.
Cost types at manufacturing parts will get added during the cost simulation process.

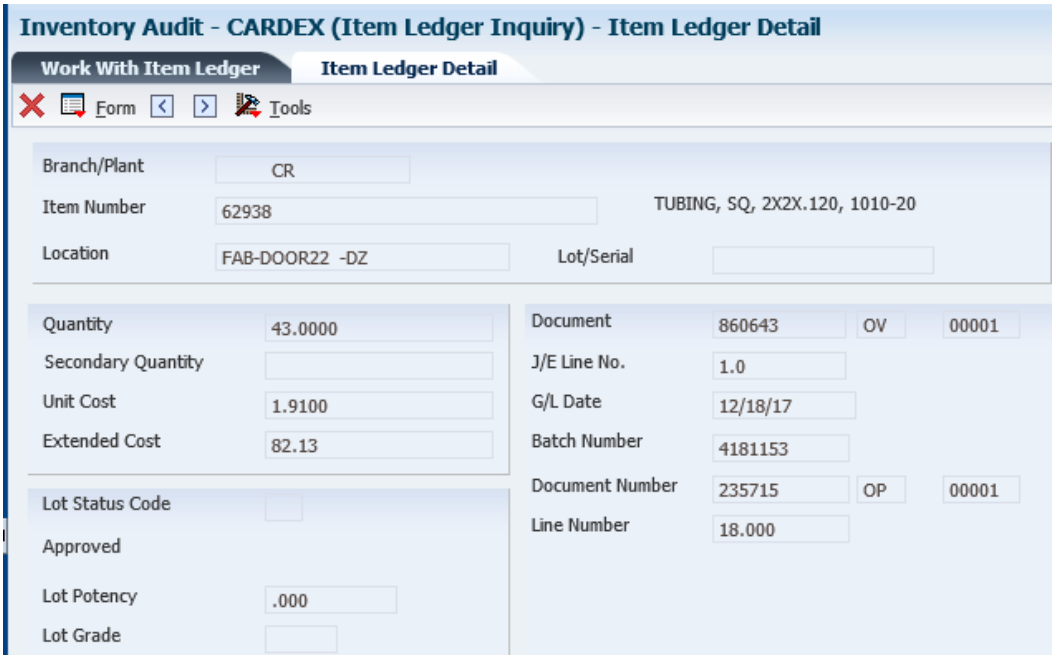
Inventory transactions: who, what, when?
The typical troubleshooting during cycle count or workorder variance calculations involve analyzing inventory transaction. If there are multiple transactions of the components against the same work order (due to incorrect WO status), the easiest way is available on the row exit.
Highlight the data row and go to row exit for transaction details. This is much easier than running multiple reports or asking IT for data dump. Row transaction will give GL details, if there are Inventory to GL integrity issues.



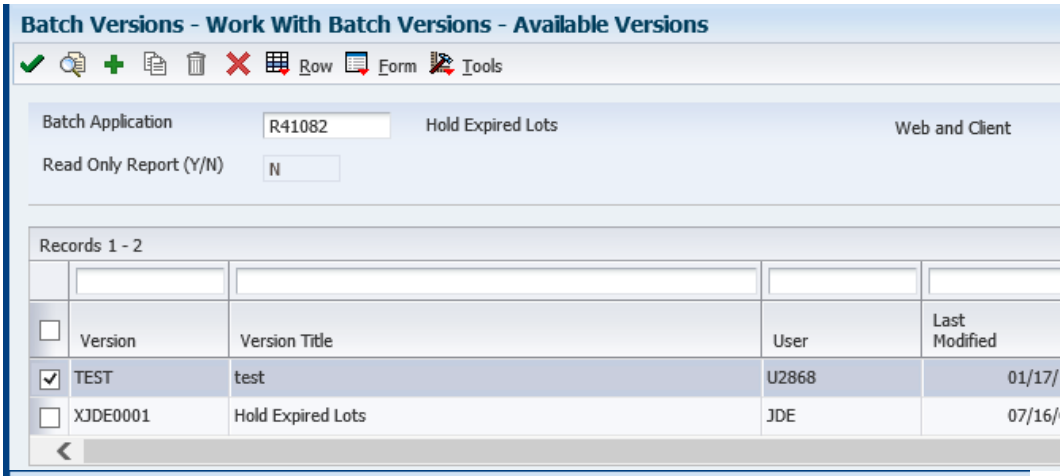
Row>Detail

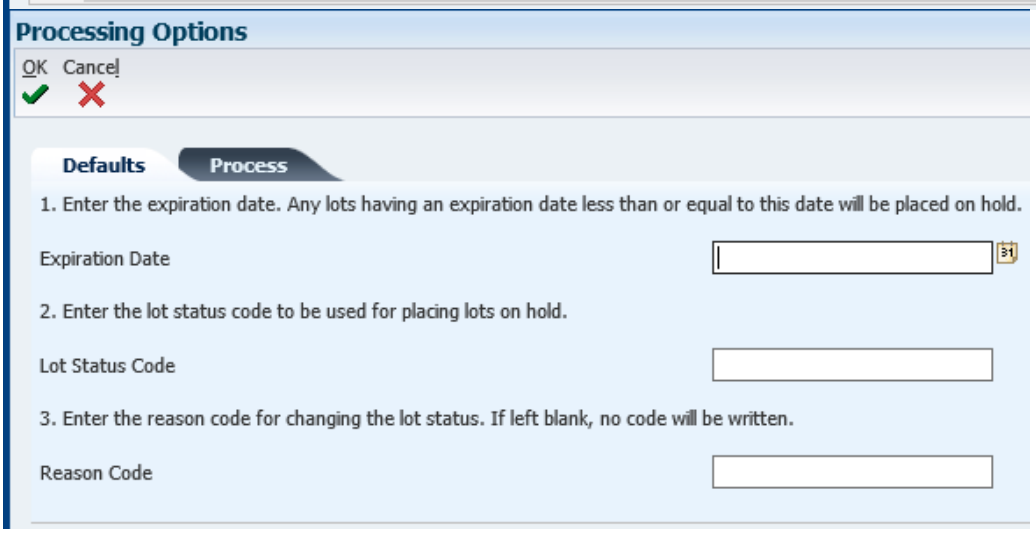


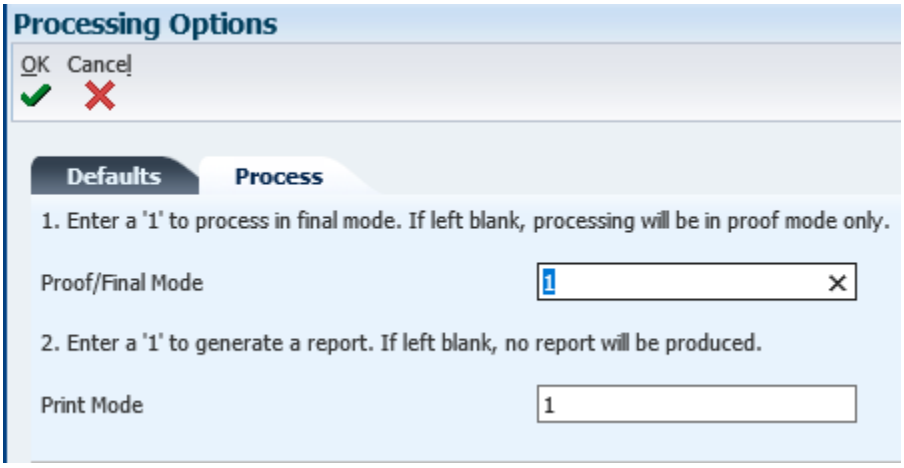
Row>Transaction



Automate lot holds
When the product lot expires, system put the expiry dates. User(s) would like to get these items go on an auto hold for quick reporting and re-mediation fixes. Otherwise, the inventory availability will show these quantities as not available with no explicit holds.
Use the R41082 to place your custom hold codes when the lots get expired. This job can run nightly basis. You can also a valid reason code. For initial implementation run the batch on proof mode to know the inventory impact or any data issues.






Processing Options
OK
Cancel
Defaults
Process
1. Enter a '1' to process in final mode. If left blank, processing will be in proof mode only.
Proof/Final Mode
1
2. Enter a '1' to generate a report. If left blank, no report will be produced.
Print Mode
1

FAQS ON MANUFACTURING FUNCTONALITY

READ ME	
1	This the guidance document to explain various functional points and troubleshooting actions
2	Content subject to change due to changing JDE configurations during testing
3	Super users are the first point of contact since they know the latest update on any JDE functionality
4	Some of the basic help in JDE fields can be obtained by using F1 on that field
5	Submitted jobs shows if the batch run is successful or not
6	Some of the reports has the last page to show any errors
7	Users should be familiar with Work center (not routing workcenter), to understand job errors
8	Always (and ALWAYS) test new process changes in PY environment first.
	Create/Use the JDE cheatsheet for quick reference

	JDE		Product Data Management FAQs
	function	question	answer
1	bills	why bill of materials are required?	bill of materials (bills) define the recipe of finished product. In discrete manufacturing, it is the components that are required to make/assemble a product. For every M item (in DC or vendor branches), a bill with 'blank' batch should be available with valid items as components. MRP uses this info for PO requirements
2	bills	is alternate bills possible?	mfg bill is defined as 'M' type. You can add additional types as' ALT1' etc to store that separate bills for an item. Only M type bills are used in MRP and WO generation. User can override them manually in a WO.
3	Bills	substitution definition	User can highlight the component and go to row exist to define item substition with effectivity dates. WO will replace item with substitution and split the lines, if the original item is not available
4	Bills	feature cost% field	This field has to be 100% for cost rollup to work. If you enter bills manually this may get populated automatically. If you are using Z files, ensure this field is included in the upload
5	item branch	why item branch is critical?	Item Branch is the very important application that drives the planning, materials and logistics functionality. An item could have different parameters in different branches. (example stocking type)
6	item branch	planners, buyers and suppliers	What is the difference between planner, buyer and supplier numbers? Planner is master scheduler who plans S&OP process. Buyers are resources who releases purchase orders based on approved S&OP plan. Supplier numbers are vendors on whom purchase orders are placed. The term supplier & vendor are used as similar field. Supplier provides goods and Vendor may be provide services.
7	item branch	lead time	lead time is in days. Calendar days for purchased items. Shop floor calendar for manufactured items. User can enter lead time in LTLV lead time level field in item branch. There is a JDE process to roll-up lead time when we make items. (purchased lead time plus manufacturing cycle time).
8	item branch	location	locations are the bins that stores inventory in JDE. (not to be confused with physical location like city). If the user enters a wrong location, system will give soft warning but will go ahead and create that location for that item

9	item branch	safety stock	JDE does not calculate safety stocks and it's the quantity in primary uom. User can enter or upload the data based on the frequency of the changes
10	item branch	branch relationships	JDE uses branch relationships to define what products are kepts in WH (warehouse) but made in various mfg branches.
11	item branch	branch	These are physical or virtual mfg/assembly plants. There are pros & cons of having many branches
12	item master/ branch	difference between item master and item branch	Item master is the foundation of the product master. Only certain fields are critical in business process for itemmaster (like category codes). Most of the functionality is derived from 'item branch' records for business transactions.
13	itemmaster	what is GLCode?	GLCode drives all financial transactions. If the product is reclassified from one category to another, which field is critical for financial reporting? Answer: GLCode. The change has to happen in itemmaster(for reporting), itembranch and all itembranchlocations. GL code is also stored at location level. If you're changing GLCode for existing item, ensure all fields are updated for consistency. Existing transactions may have old values, hence keep **** in DMAAI tables
14	itemmaster	changing primary uom	Can we change primary uom after receiving inventory and sales transactions? It is better to create new item number if the form/fit/function has changed. There are lot of steps if we are changing primary uom for the same item.(not advised)
15	itemmaster	Category codes	Category codes: Can we change them any time? Yes. But only future transactions will reflect the changes to these codes. In some reports, you may still need past and current values till a specific fiscal year is complete.
16	itemmaster	usage of MPF (PRP4 code)	Why master planning family(MPF) code important? This category code helps in running MRP selectively (if required) and also helps to find MRP output for related product groups.
17	itemmaster	Z files	Z files are JDE way of mass uploading data. There are Z files for item master, item branch, bills and routings. Only certain users will be authorized since this process directly impacts key data
18	itemmaster	costs	During cost roll-up, 07-standard cost is calculated for manufactured items based on component costs. Review product costing FAQs
19	routing	what is routing?	Routing is the process of defining labor requirements for manufacturing. This has nothing to do with move products from sourcing to distribution centers.
20	routing	what data points are important?	workcenters, operations sequence, labor/ setup time. Time basis should be U-units, for per unit manufacturing (unless you have batches)

21	routing	data points for outside operations	JDE needs vendor number, PO flag=Y and cost type=D1 (These are mostly popularly used)
22	routing	can alternate routing can be maintained? (ex. Service)	M' is used for manufacturing WO. User can create 'ALT1' for other reasons. There is no automated way to use ALT1 in workorders. User need to manually update them in case they are using ALT1 in a WO
23	routing	how to add a new workcenter?	Each workcenter is also a business unit with WC type. Only certain users can create new business units. Once that's done, you can add the same record in workcenter record for each branch plant. Go to row exit and add workcenter rates. New workcenter rates need to frozen before using them. The report in the menu does the workcenter rate freeze
24	routing	Yield and cumulative yield %	These fields need to be 100% default, except if yield are calculated by the system. If you enter routing manually these may get populated automatically. If you are using Z files, ensure these fields are included with 100%. Otherwise, super backflush will not calculate labor hours.

	FAQ on	planning	
	function	question	answer
1	Forecast consumption	What is forecast consumption.	JDE can offset sales orders received against the forecast and plan for net requirements. This will avoid planning for forecasts and then it gets dropped at the end of the month. You need planning code H & 999 in item branch setup. MRP run is already configured to use forecast consumption model
2	forecasts	how are forecasts defined.	JDE can generate forecast based on past sales history. You need 2 years of sales history to generate forecasts. MRP batch can handle 5 different forecast types
3	message processing	can I group items supplied by the same vendor into a single purchase order.	you can filter the O(order) or B(expedite) messages using vendor number in the query. Highlight the entire rows and press message processing. System will consolidate all the messages into a single order.
4	message processing	why I cannot combine multiple order lines for a same item into a single line?	(1) this could be due to different due dates (2) MRP keeps a pegging relationship with the original demand. Combining multiple demands into a single supply will not
5	message processing	how the workorder messages converted	select the rows you intend to convert into work order. Go to row exit and press process messages. Work
6	message processing	What is best way to prioritize messages?	Filter doc type (WO, OP), enter <date on the requested date to filter out next 30days worth of messages.
7	message processing	Closed JDE by mistake during message processing for workorders.	If you have pressed 'process messages', system should have generated orders. Query back with filters: message processed=Y and you can review them back.

8	message processing	Closed JDE by mistake during message processing for PO.	Since MRP expects that you select item for PO, process message and close the application to generate orders - these could be failed in the transactions. Go back to application and query them back and re-process them again. Always query current open orders before releasing them again to avoid duplication
9	message processing	Why there are hundreds of messages?	MRP plans for months ahead. Filter out on dates and message types. For long-lead times, there could be messages out in the future.
10	message processing	how do I remove duplicate or redundant messages?	you can select the rows and go to row exit, press clear. The message is taken away from the application. Remember, the message(s) will come back after next
11	message processing	how do I filter correct messages in the application.	enter your planner number (or) buyer number (or) master planning family code to filter relevant messages. On the QBE line enter !=A in message type to filter out
12	message processing	how do I get all messages I am responsible for?	(1) query on planner or buyer to filter your messages and export them (2)use MRP messsage print application from the reports menu. Run the report for your user-id (as buyer or planner). Download the report output (excel file) and sort as needed. Next day's MRP run will clear processed messsages and/or may change due to supply-chain situation.
13	MRP frequency	What is the batch freqency?	MRP can be scheduled to run every day early morning. IT can run it manually, if needed when no major transactions are happening in the system (like lunch
14	MRP frequency	what decides the frequency?	supply and demand variations. Example: daily run will capture workorders completed or purchase orders received so that there are less messages to
15	net change	processed lot of orders, want to see the impact the same day (not wanting to wait next day MRP)	Run net change for your item(s). The report is under the planning menu. This will re-process all the message for your item(s) but will impact both WO and PO
16	purchase order-firmed order	when does the system assigns the order number?	after you select the messages to process, user need to close the application. Another window opens up to generate the order number. This is due to additional system security required for buyers. On this window, you can review the order lines before pressing ok.

17	Purchase Order messages	Cancel and Order at the same time	MRP will not split existing orders. It will ask to cancel the entire order and then place new one for the partial quantity. User can modify existing order manually & system will reflect this change
18	Purchase Order messages	D-defer & E-expedite messages are very high	There is a way to suppress them but it's not advised
19	Purchase Order messages	Can't change orders (PO or WO) often	You can freeze the orders (both WO & PO). Some companies run a UBE to freeze every PO in the nightly batch.
20	purchase order updates	can I make changes to purchase orders generated from messages	yes. You can make date/quantity changes, as needed. Next MRP run will recognize the changes and generate messages accordingly
21	S&D inquiry	Shows past month dependent messages not yet processed.	These come from sub-assemblies having long lead time. Review lead time at all levels
22	work order-firmed order	when does the system assigns the order number?	once the user process the message, system assign the next workorder number. You can see the order number in the message detail application itself.
23	work order updates	can I make changes to work orders generated from messages	yes. You can make date/quantity changes, as needed. Next MRP run will recognize the changes and generate messages accordingly

	FAQ on workorders		
	function	question	answer
1	WO completion	what do I need to report WO completion?	your order number, completed quantity, location and lotnumber(if applicable). This activity can be done by end-user or barcode scanner.
2	WO completion	I do not know the exact completion quantity right now..can you key in some values?	system takes partial quantity. Do not report excess quanitity above what is listed in WO. To match completions and issues, it is better to get this data prepared along with issued quantity for each rawmaterials
3	WO completion	why I need to key-in locations. (applicable only if you are manually reporting completions in JDE)	for completion, you need to decide where to put the finished items. There is no data filter in this field. If you ignore this field, system will put the inventory in blank location (where other soft commits exists)
4	WO completion	do I need to enter lot (or) serial number for items?	For SN controlled items, you can generate the number during WO entry (or) WO completion. For lot controlled items, system assigns lot during WO completion. You can also key in manually lot number during WO completion (as in PO receiving time too)
5	WO completion	What is the difference between backflush and super backflush.	JDE can configured in many ways. WO can be completed at FG level without issues & labor. In backflush setting, completion happens with material issues. In superbackflush, system can report materials usage and standard routing labor automatically. We can change setting in superbackflush to report completion with just labor standard.
6	WO- dispatch list	My order is not showing up.	Check the work center is listed in the WO routing. Change from and to dates. Check the previous operations is closed at status 80 (as applicable)

7	WO entry	what data inputs are required to create a workorder?	branch(mfg-plant, example M30), parent partnumber (example: 7062762) quantity (example: 10) and required date(example: 1/1/2020)
8	WO entry	yellow warning on WO creation	if the WO required date is less than the leadtime of the product, system will give warning error. All yellow warnings are meant to be reviewed and you can press ok to proceed further
9	WO entry	red warning on WO creation	if there are no bill of materials and/or routing defined for the parent, system will give red error. You cannot move forward for red errors. Please close the application and contact Engg for a valid bill/routing. This might have been changed after 9.0 release
10	WO entry	made mistake in date or quantity while entering workorder	you can locate your order and revise the date and/or quantities. This has to be done before you print the workorder. Workorder print hard-comitts components and move the order status forward for completions or material issues. (if such system configuration exists)
11	WO entry	choose wrong product on the workorder	you can cancel the workorder, if you have not acted further on completion or material issues. Move the WO
12	WO labor reporting	how does system know the labor usage?	when you print WO, the routing for the partnumber is attached as labor standard.
13	WO labor reporting	how can I correct the labor hours.	on labor entry application, you can add new lines for positive or negative labor hours.
14	WO labor reporting	why do I need to "update" the labor? This is for managers	unlike materials, there is no cardex for labor. Update action takes the final labor hours into different files for variance calculations

15	WO labor reporting	I already updated labor. Now I need enter more hours.	you can enter wo number on the header and press ADD. Enter your additional labor press update again. If the order is closed, system will not allow labor entry
16	WO labor reporting	I need enter more labor for previous day.	you can enter labor date and then wo number on the header and press ADD. Enter your additional labor press update again. If the order is closed, system will not allow labor entry
17	WO material issues	how does system know the material issues part numbers?	when WO are created and printed, system takes the bill of material for the parent part and assigns as 'partslist' to this workorder.
18	WO material issues	how does system assigns lot numbers.	WO print application assigns lots based on FIFO. This is a system configuration set at the branch level
19	WO material issues	how can I change the lot number?	click location field. Using 'lens' icon, search the available locations with lot number. Select the line with your
20	WO material issues	Need to over issue component.	user can add a new line to partslist or issues screen, enter order qty or issued quantity.
21	WO material issues	Need to report component return or correct over issue	user can report negative quantity in the issues application as a separate line. You can even return the item to a different branch/location
22	WO material issues	system picked lot is not correct or wrong location	user can override the location/lot during issue time. If this info is known ahead, planner can update this in the
23	WO material issues	how does system release lots if one specific lot is replaced with another during issues.	There is a night batch called WO repost which does the recomittment process

24	WO material issues	component was wrongly catogorized as lot controlled.	you cannot delete lotnumber for lot controlled items in WO. You have to delete the component line. Go back to Itembranch to remove the lot control. Enter the component again manually in WO issues.
25	WO material issues	component has to be lot controlled but it Is not set right.	system will not pick lotnumber automatically for non-lot control items. You can manually assign them in PL. To make permanent change, you have to modify the lot control settings in item branch
26	WO print	Did not enter order number and ran it on blind mode.	This the reason a default dummy number '12345' is maintained in the data selection. If the user forgets to change it, system will not do anything since 12345 may not be a valid number. If the user deletes the data selection, then all open WO in the system may get printed again and status moved to 40 again. If this MAJOR blunder is captured immediately, IT can restore the WO tables quick from a backup. The order generated from last back up need to entered again. From 9.0 release onwards, there is a processing option on NOT to allow without data selection
27	WO print	Why the PRINT WO is required?	print is a JDE process where the workorders gets applicable partslist and routing. Partslist is copies from current product bill of materials. Routing is copied from current product routing. Print process also hard-commits partslist to FIFO (first in firstout). At the end of the print process, workorder status is moved to indicate successful completion of printing.
28	WO print	how do I know printing was successful.	(1) workorder status is moved to 40. (2) there are many outputs in your submitted jobs queue.

29	WO print	how do I troubleshoot if the print was NOT successful.	look whether R31410 generated many other outputs. It may be due to wrong data selection and/or WO is already past the applicable status level.
30	WO print	what are the outputs from WO print?	(1) R31410 is the job you submitted. This does not have any output. This job process the following reports. (2)R5531415 is the main WO document (3) R31418-shortage list (4) R31416 is shopfloor packet summary(removed for now) (5)regular R31415 which shows outside operations PO (6) test result worksheet R37470
31	WO print	processed the wrong order number and sent to submitted jobs.	communicate to the 'other' scheduler/planner of this error. They can push back the order status and re-print the order as needed. Always use caution while changing data selection and review them before pressing ok.
32	WO print	output shows no data.	you have either selected wrong order (or) did not modify data selection while using this application. Also do not open the WO in the main JDE screen and then process for printing. There is record lock which may prevent report getting printed
33	WO Reprint	Why reprint?	1- planner released the order & printed (to commit PL). Another dept. wanted to print the WO. Re-print is the option. 2- Planner made changes to PL/Rtg after print, then reprint is the option to get the changes printed. 3- Shopfloor made some changes to PL/Rtg and want to print WO again for the next steps, Reprint is the ONLY option. 4- Acctg want to print WO after completion for documentation. Reprint is the option
34	WO status codes	status codes.	System moves the WO based on status codes. Examples: 10- generated, 15-on hold, 40-printed, 45-matl issued, 50- on hold, 80- partially complete, 92- mfg complete, 95- ready for acctg. 96/97- mfg acctg; 98/98 variance accounting. Remember there is no last or next codes in WO side (compared to PO or SO)

35	WO Time entry	how do I select employee number?	if system is not defaulting the employee code, you can select the value by searching 'E' type and locate the applicable value. Press ok to get the number back into your application.
36	WO time entry	Different ways to capture time entry.	User can enter start time, save & close. Come back again and enter end time. Or, enter start/end time. Or, enter the time spent directly without start/end time.
37	work orders	Outside processing	For outside processing, system will automatically generate purchase orders (OO type) for each workorder. The settings come from item routing (vendor, PO=Y and cost type=D1). For one-off situations, planner can enter outside operation routing manually in WO routing>Form exit>Generate PO
38	work orders	what are workorder types	A transaction that helps to make/assemble product. There are many ways of manufacturing products (discrete, process, kanban, rate-based, project-based, etc.) Examples are, WO for regular mfg items, WR for repair , WE for Engineering orders and WM for maintenance (CAM)
39	work orders	calendar	shop floor calendar. There is a work-day calendar for each branch so that MRP will not ask you to make products on a weekend. You need to keep 5 years of calendar updated in JDE for MRP to work
40	work orders	De-kitting type of orders	WO process can be used to take one parent product and convert into another FG. User will generate WO on the new product, issue the original product, add more components (if required) and report labor. WO variance will happen but can be explained

	FAQ on Mfg Accounting		
	function	question	answer
1	Integrity reports	How to find data integrity issues?	There are lot of JDE integrity reports that need to be run as a part of month-end close. Check KnowledgeGarden/ Oracle support site
2	manufacturing accounting	run frequency	mfg actg needs to run daily to sync perpetual and GL. During period close, you may run it manually many times to capture last work day transactions. Variance can be done weekly, but need to be run manually again at period
3	manufacturing accounting	ran report but nothing happened	Either you did wrong data selection (or) there are DMAAI errors on the last page of the report. You can also looking at your work center for JDE error messages
4	manufacturing accounting	How to query WO qty and cost status?	Go to WO, row exit to PL or routing. The application will show current qty or hours consumed. Use Production cost inquiry to see the dollar impact. Use OneView WO cost Inquiry (This is a very popular tool)
5	manufacturing accounting - final	what does final mfg accounting do?	final run create JE in system. GL batches are ready to be posted. WO status moved to next step of variance accounting
6	manufacturing accounting - proof	can I run it on multiple workorders?	yes, you can key-in range of workorders (or) enter different order numbers in the data selection. If all open WO's are staged correctly, you can run the batch wide-open without the need to enter each order numbers.
7	manufacturing accounting - proof	ran this report and realized labor hours have not been updated.	you can run the proof again, after updating the labor hours. Proof reports can be executed any number of times since no update(s) have happened.

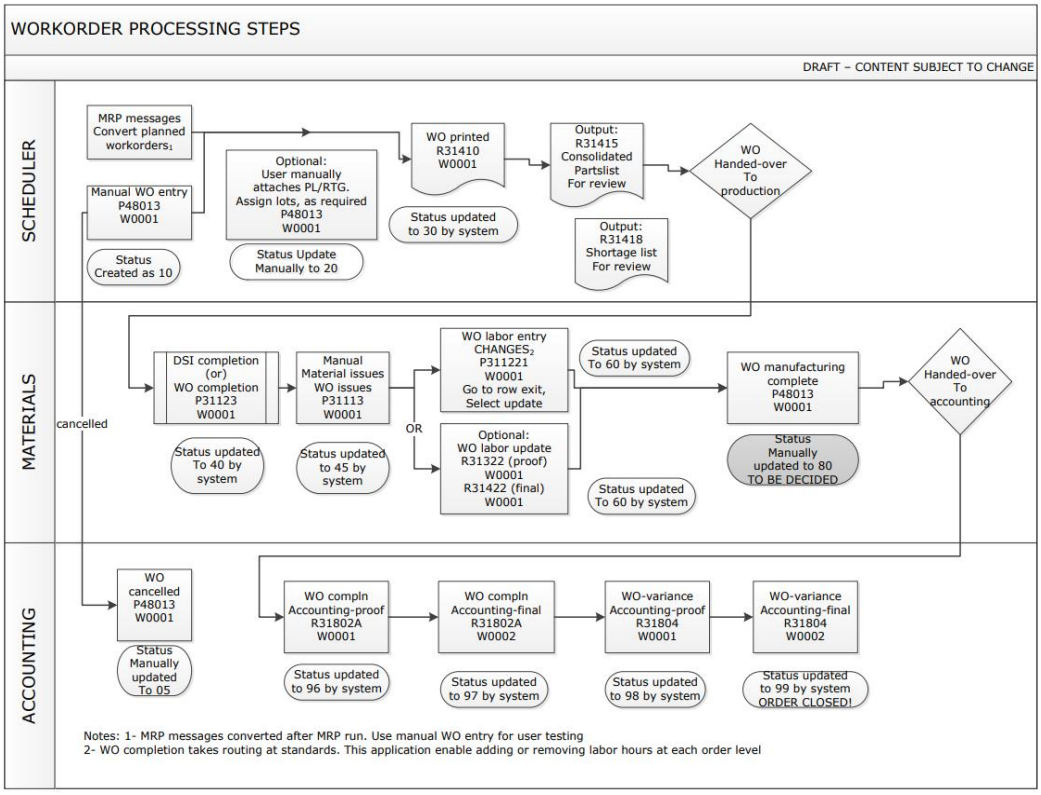
8	manufacturing accounting - proof	proof output shows materials issues not correct.	ask production for correct material usage quantities. Please remember every small change (positive or negative) in material issues compared to attached partslist will throw manufacturing accounting variance.
9	manufacturing accounting - proof	what is the difference between proof and final?	proof gives an opportunity to review the journal entries. The tables are not updated in proof run. You can print or save the PDF for future reviews,since final will override the initial proof runs. In the proof run, please check the last page of the output for any accounting related errors
10	variance accounting-final	what happens in final variance run?	variance JE created in JDE and ready for posting. WO is closed at 99 status. From 9.0 release onward, penny batches are removed by the system!
11	variance accounting-proof	why is the variance proof run required?	difference between standard and actual values are converted into variance journal entries. User need to verify the details since it significantly impacts company books.In the proof run, please check the last page of the output for any accounting related errors

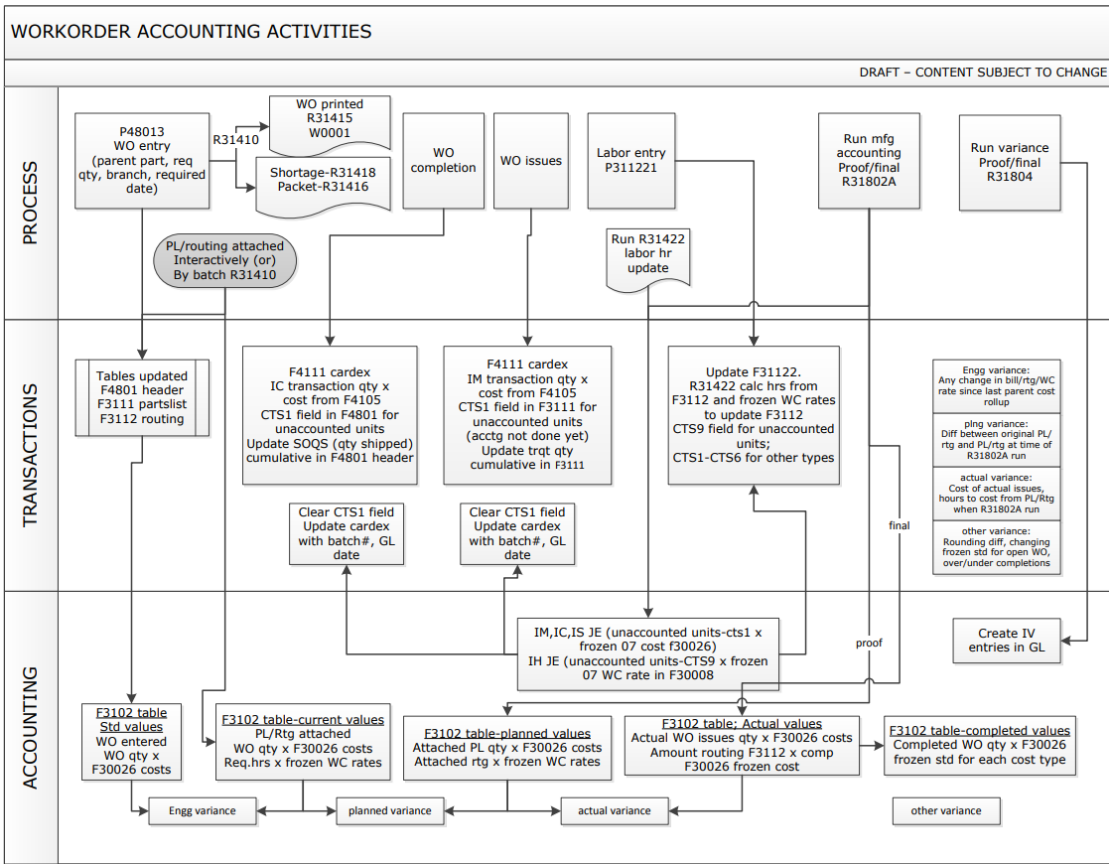
	FAQ on Product Costing		
	function	question	answer
1	Cost components	can I capture new costs like tools, freight, utilities (as exceptions)	you can add X components in the cost components either as $ or as %. System will roll up the costs. The data maintenance is done at the item level. Some companies, create a custom UBE to append X* row to the F30026 table for purchased items
2	cost data - past history	can I query what was the cost as of beginning of the year?	System does not keep past historical cost simulation or frozen data. You can query item ledger (cardex) for past $ values. The best practice to keep the cost freeze final data in excel and store in a network folder. Or export the total cost and import into F4105 table as custom cost method (like 55 & above)
3	cost data-storing past data	can I compare past and new costs	you can cost copy current standard into different cost method (like 14A for last year actuals). Since systems is hard-coded to use 07-std cost, this 14A will not be used in transactions. Table F4105 can be extracted to compare the cost data.
4	cost freeze-final	What happens in final freeze?	There will be GL batches created for the inventory revaluation. Frozen cost is moved to item cost level so that future transaction can take this new cost.
5	cost freeze-final	What is the frequency?	For new products and/or major changes to current product, cost accounting runs this manually. It is suggested that there are not open workorders for that item(s). For company-wide change, this can be executed at the beginning of every quarter (to capture recent changes to component standard cost). This depends on the industry type.
6	cost freeze-final	What if user runs the batch wide open?	Instead of running for specific items, if the user runs it wide open for the branch - system will create a major GL batch with all the changes. And immediate transactions in inventory/WO will use the new cost. (There is reset option but too risky in production system. There is no othere easy way of rolling back the costs. Hence user should never delete the data selection on this batch.

7	cost freeze-proof	why cost freeze proof is required?	When you do cost freeze, the current inventory is revalued. Hence you should know the $ impact upfront. Proof mode shows the impact but do not write journal entries
8	cost freeze reports	Want to get the report in CSV type	During execution, go to printer selection screen and choose CSV option. System will generate both PDF and excel files. You can ask IT to re-configure all reports to generate CSV automatically
9	cost freeze-simulation	cost is incorrect.	1- check bill/routing 2- check WC rates 3- check component std costs 4- check outside operations item cost 5- check effectivity dates on bills/routing 6- check feature cost% field in the bills 7- check time basis in routing
10	cost freeze-final	how do I know if there are errors	1- look at the last page of the report for any known AAI issues. 2- if cost component inquiry screen shows NOT-EQ sign in frozen and cost ledger column that means system did not update costs
11	cost integrity	Want to check if there are zero cost items	Run zero cost report to identify such exceptions. This has to be a part of your period close process
12	cost simuation	What is cost simulation	This is the process of rolling up costs for a finished goods item. It takes all materials and labor costs.
13	cost simulation	cost methods.	Standard cost needs are defined at the itembranch configuration. Cost simulation batch uses these configurations
14	cost simulation	How many times you can run cost simulation?	you can run this manually any number of times. There is no inventory or accounting impact. Use cost components inquiry application to review the impact
15	cost simulation	how to add new std cost for purchased items?	For new component, you can add it in itembranch with 07 cost entry. For existing components, you should NOT modify the 07 cost entry in item branch. It will revalue onhand inventory and create GL batches. It should be entered as 08 type, and let the cost roll take 08 cost toward simulation/freeze. Please check with JDE consultant
16	costed bill or routing	Engg just changed some values. Can I see the impact without running cost simulation?	yes, use costed bills or costed routing application. These are real time calculations. These will not update cost components tables.

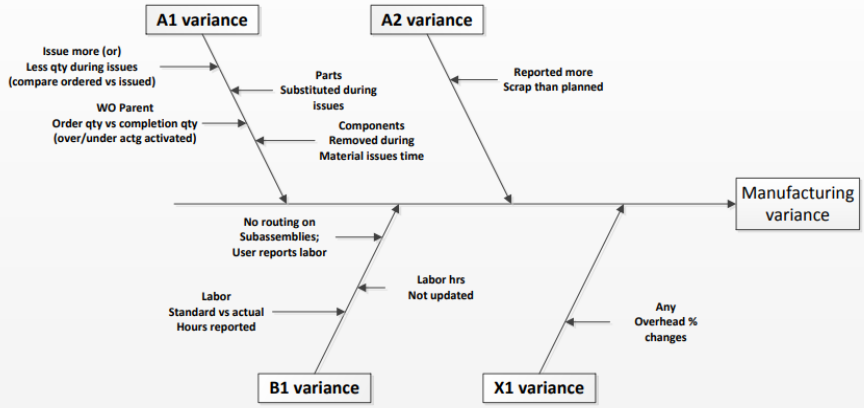
	FAQ on Quality		
	function	question	answer
1	certificate of analysis	COA did not generate any data	The item/location/lot should be valid in an open sales order line. User to run COA generation which generates the table. The report just extracts data from the table and prints it.
2	Lot trace track	how does this get updated?	During transactions, system captured the lot trace/track. The items need to lot control (not lot option) to trace/track to work.
3	lot trace track	can I print all the details for a product being recalled.	The report is available in the menu
4	Test ID	can I have different range for the same test id (example:	You can override new range at the quality profile for that item, if test-id is used directly.
5	Test result entry	Can it be entered as stand alone	Yes, it can be entered as stand alone mode. This can be invoked during WO completion, Shipment time. (these are just options)
6	Test result entry	What happens if the test failed?	currently configured to put the lot on Q hold. The data goes to Disposition application.
7	Test result entry- partial	can I enter partial results and leave it open.	you can enter partial results and save the record. You can locate it again and complete the process later
8	Test result worksheet	can it be printed on paper?	WO print has been configured to print test result work sheet, if quality profile exists for that item
9	tests vs spec	what is the difference?	specification is a grouping multiple tests for a product. This helps is better data organization but restricts having different test values in test results entry

STANDARD JDE MANUFACTURING PROCESS FLOWS

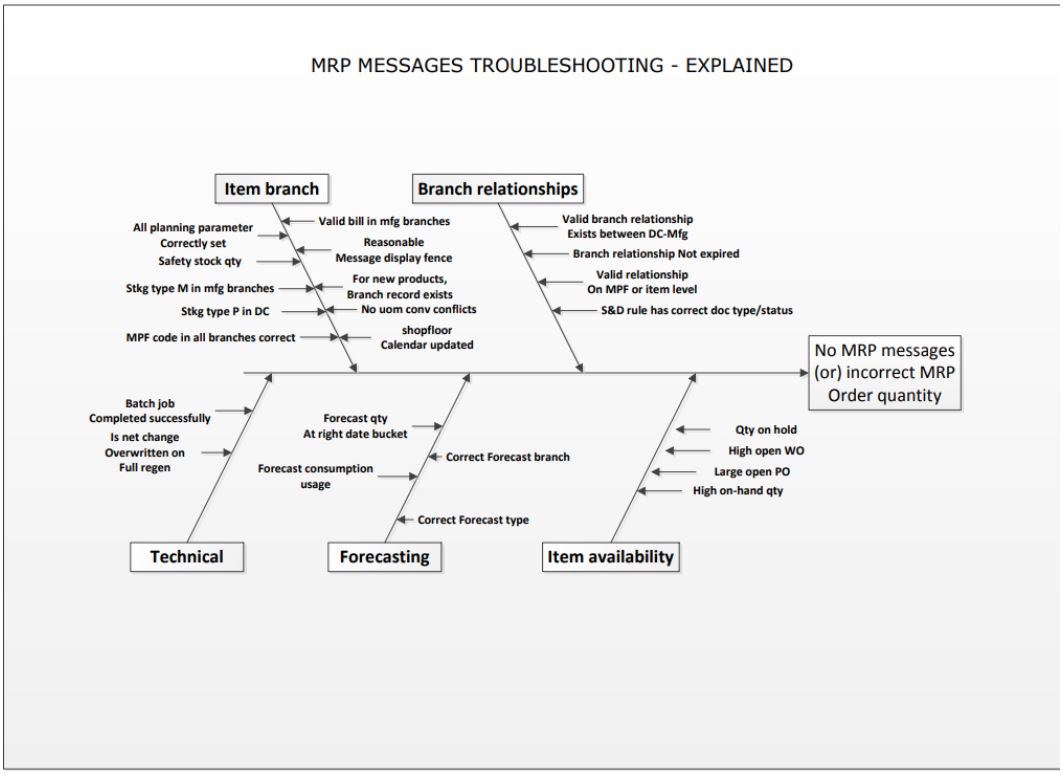



WORKORDER ACCOUNTING ACTIVITIES
DRAFT – CONTENT SUBJECT TO CHANGE
PROCESS
TRANSACTIONS
ACCOUNTING
P48013 WO entry (parent part, req qty, branch, required date)
R31410
WO printed R31415 W0001
Shortage-R31418 Packet-R31416
WO completion
WO issues
Labor entry P311221
Run mfg accounting Proof/final R31802A
Run variance Proof/final R31804
PL/routing attached Interactively (or) By batch R31410
Run R31422 labor hr update
Tables updated F4801 header F3111 partslist F3112 routing
F4111 cardex IC transaction qty x cost from F4105 CTS1 field in F4801 for unaccounted units Update SOQS (qty shipped) cumulative in F4801 header
F4111 cardex IM transaction qty x cost from F4105 CTS1 field in F3111 for unaccounted units (acctg not done yet) Update trqt qty cumulative in F3111
Update F31122. R31422 calc hrs from F3112 and frozen WC rates to update F3112 CTS9 field for unaccounted units; CTS1-CTS6 for other types
Engg variance: Any change in bill/rtg/WC rate since last parent cost rollup
plng variance: Diff between original PL/ rtg and PL/rtg at time of R31802A run
actual variance: Cost of actual issues, hours to cost from PL/Rtg when R31802A run
other variance: Rounding diff, changing frozen std for open WO, over/under completions
Clear CTS1 field Update cardex with batch#, GL date
Clear CTS1 field Update cardex with batch#, GL date
final
proof
IM,IC,IS JE (unaccounted units-cts1 x frozen 07 cost f30026) IH JE (unaccounted units-CTS9 x frozen 07 WC rate in F30008
Create IV entries in GL
F3102 table Std values WO entered WO qty x F30026 costs
F3102 table-current values PL/Rtg attached WO qty x F30026 costs Req.hrs x frozen WC rates
F3102 table-planned values Attached PL qty x F30026 costs Attached rtg x frozen WC rates
F3102 table: Actual values Actual WO issues qty x F30026 costs Amount routing F3112 x comp F30026 frozen cost
F3102 table-completed values Completed WO qty x F30026 frozen std for each cost type
Engg variance
planned variance
actual variance
other variance

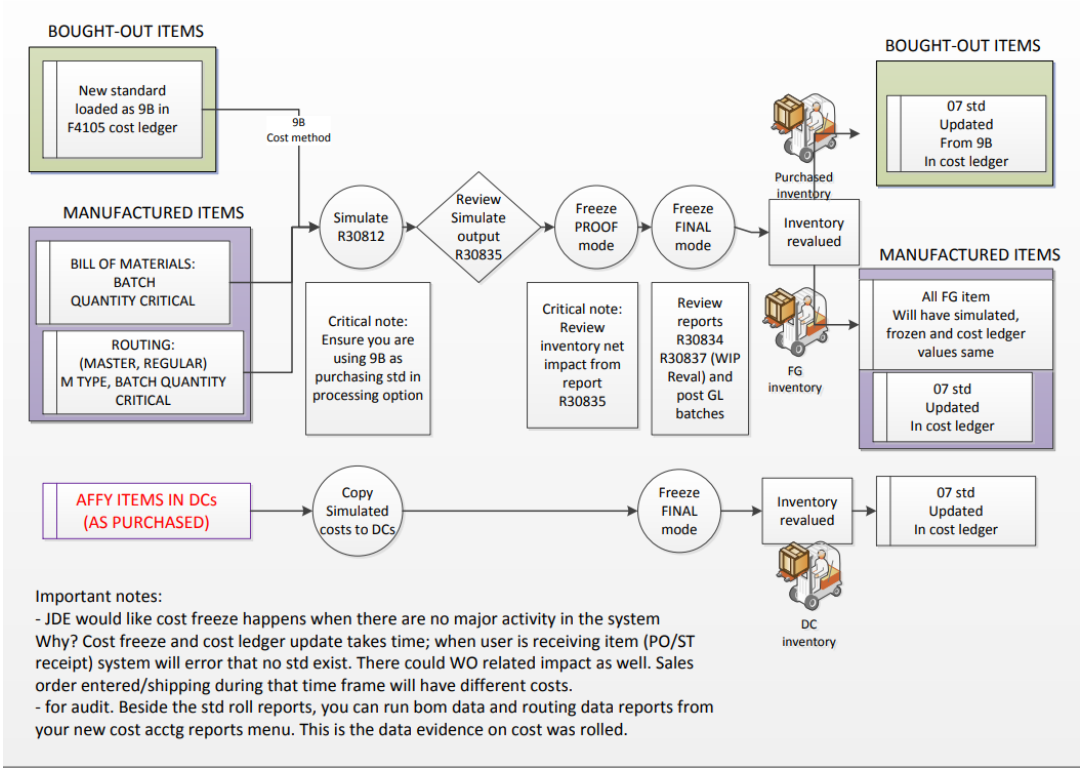
MANUFACTURING VARIANCES- EXPLAINED



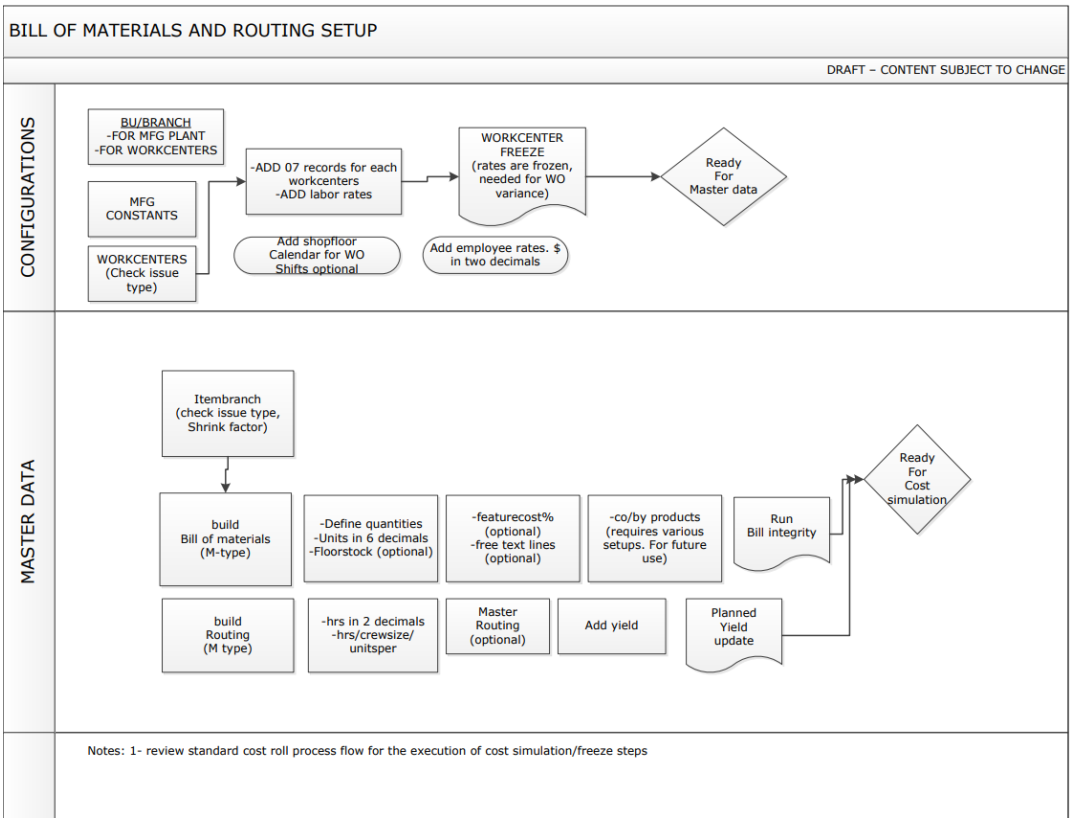
Notes:best tools available to user(s) to troubleshoot
- production cost inquiry
- inventory issues application. Re-order view to show qty ordered, qty issued

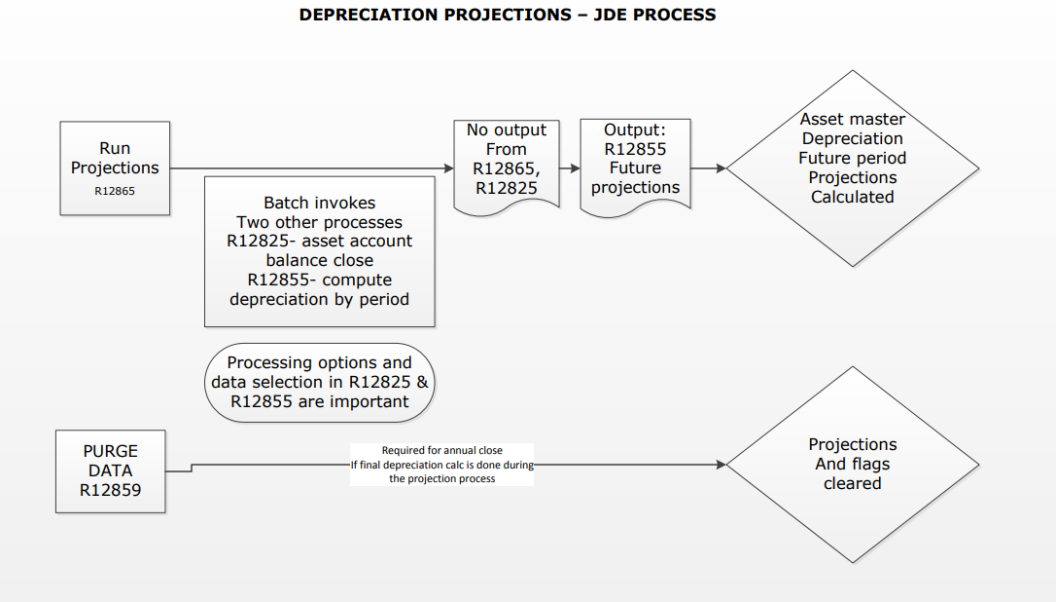

MRP MESSAGES TROUBLESHOOTING - EXPLAINED
Item branch
Branch relationships
Valid bill in mfg branches
All planning parameter Correctly set
Reasonable Message display fence
Safety stock qty
Stkg type M in mfg branches
For new products, Branch record exists
Stkg type P in DC
No uom conv conflicts
MPF code in all branches correct
shopfloor Calendar updated
Valid branch relationship Exists between DC-Mfg
Branch relationship Not expired
Valid relationship On MPF or item level
S&D rule has correct doc type/status
No MRP messages (or) incorrect MRP Order quantity
Batch job Completed successfully
Is net change Overwritten on Full regen
Forecast qty At right date bucket
Correct Forecast branch
Forecast consumption usage
Correct Forecast type
Qty on hold
High open WO
Large open PO
High on-hand qty
Technical
Forecasting
Item availability

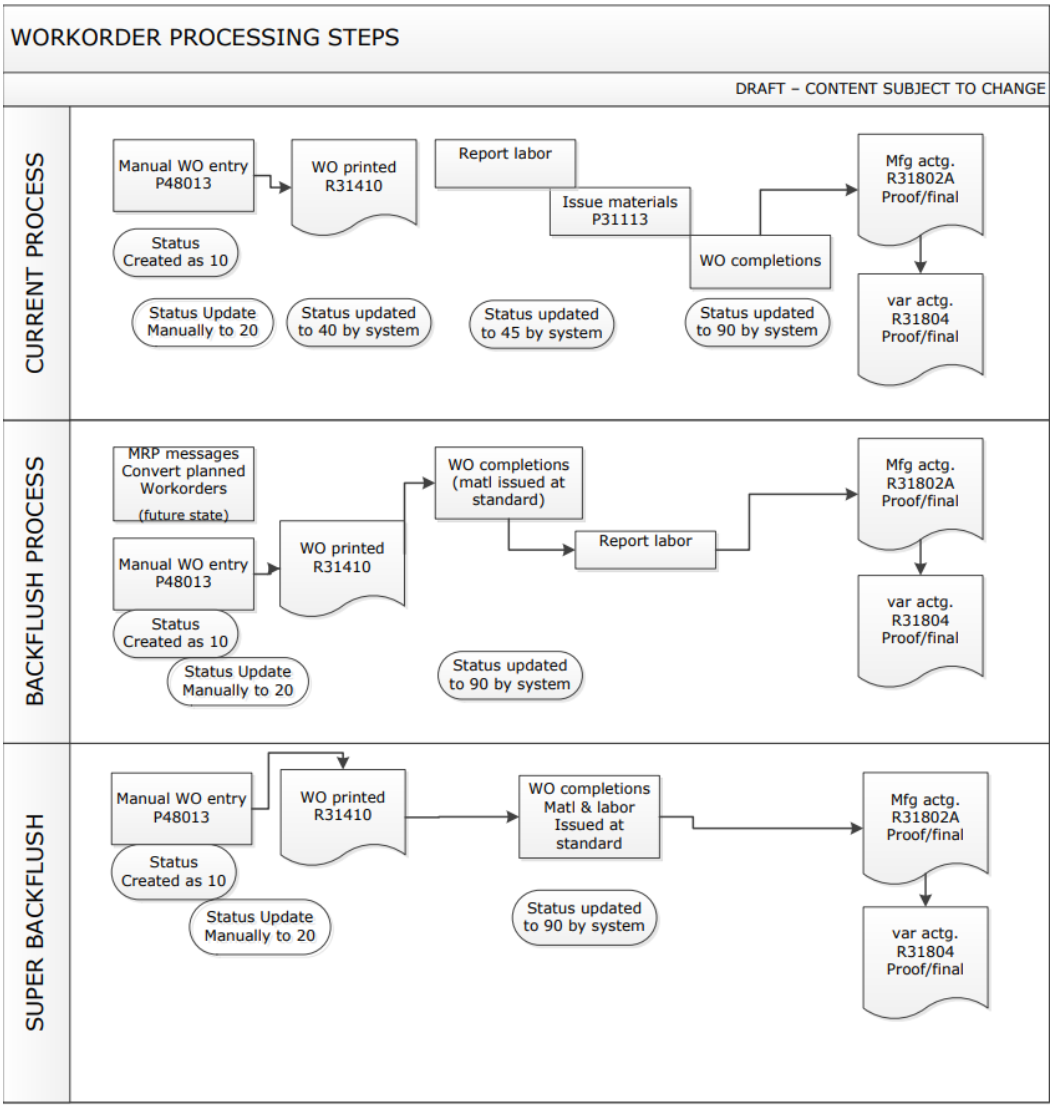
STANDARD COST ROLL

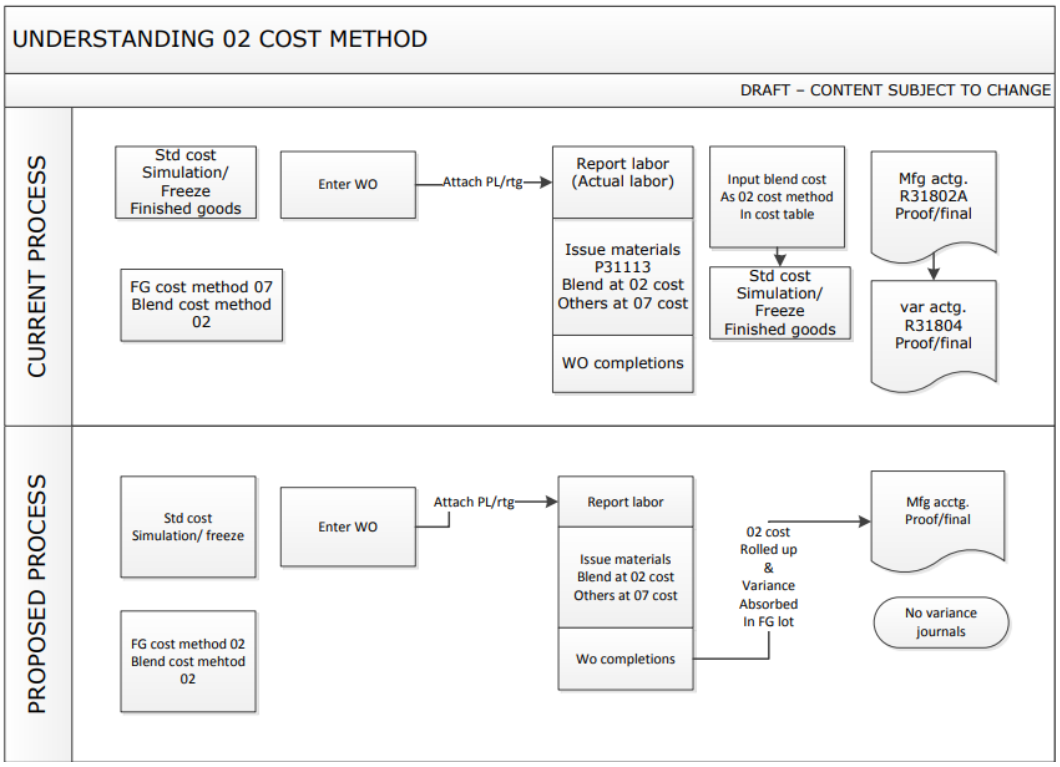


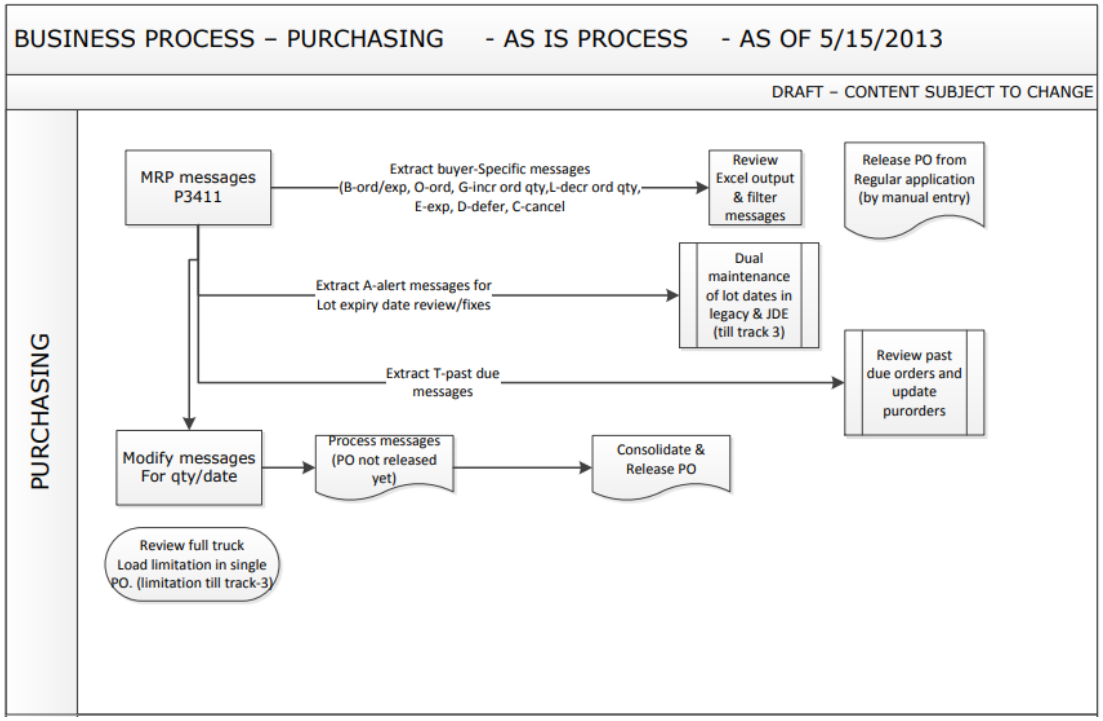
Important notes:
- JDE would like cost freeze happens when there are no major activity in the system Why? Cost freeze and cost ledger update takes time; when user is receiving item (PO/ST receipt) system will error that no std exist. There could WO related impact as well. Sales order entered/shipping during that time frame will have different costs.
- for audit. Beside the std roll reports, you can run bom data and routing data reports from your new cost acctg reports menu. This is the data evidence on cost was rolled.


BILL OF MATERIALS AND ROUTING SETUP
DRAFT – CONTENT SUBJECT TO CHANGE
CONFIGURATIONS
BU/BRANCH
-FOR MFG PLANT
-FOR WORKCENTERS
MFG
CONSTANTS
WORKCENTERS
(Check issue
type)
-ADD 07 records for each
workcenters
-ADD labor rates
Add shopfloor
Calendar for WO
Shifts optional
WORKCENTER
FREEZE
(rates are frozen,
needed for WO
variance)
Add employee rates. $
in two decimals
Ready
For
Master data
MASTER DATA
Itembranch
(check issue type,
Shrink factor)
build
Bill of materials
(M-type)
-Define quantities
-Units in 6 decimals
-Floorstock (optional)
-featurecost%
(optional)
-free text lines
(optional)
-co/by products
(requires various
setups. For future
use)
Run
Bill integrity
Ready
For
Cost
simulation
build
Routing
(M type)
-hrs in 2 decimals
-hrs/crewsize/
unitsper
Master
Routing
(optional)
Add yield
Planned
Yield
update
Notes: 1- review standard cost roll process flow for the execution of cost simulation/freeze steps


DEPRECIATION PROJECTIONS – JDE PROCESS
Run Projections
R12865
Batch invokes
Two other processes
R12825- asset account balance close
R12855- compute depreciation by period
No output From R12865, R12825
Output: R12855 Future projections
Asset master Depreciation Future period Projections Calculated
Processing options and data selection in R12825 & R12855 are important
PURGE DATA R12859
Required for annual close
If final depreciation calc is done during the projection process
Projections And flags cleared


WORKORDER PROCESSING STEPS
DRAFT – CONTENT SUBJECT TO CHANGE
CURRENT PROCESS
Manual WO entry P48013
WO printed R31410
Report labor
Issue materials P31113
WO completions
Mfg actg. R31802A Proof/final
var actg. R31804 Proof/final
Status Created as 10
Status Update Manually to 20
Status updated to 40 by system
Status updated to 45 by system
Status updated to 90 by system
BACKFLUSH PROCESS
MRP messages Convert planned Workorders (future state)
Manual WO entry P48013
WO printed R31410
WO completions (matl issued at standard)
Report labor
Mfg actg. R31802A Proof/final
var actg. R31804 Proof/final
Status Created as 10
Status Update Manually to 20
Status updated to 90 by system
SUPER BACKFLUSH
Manual WO entry P48013
WO printed R31410
WO completions Matl & labor Issued at standard
Mfg actg. R31802A Proof/final
var actg. R31804 Proof/final
Status Created as 10
Status Update Manually to 20
Status updated to 90 by system


UNDERSTANDING 02 COST METHOD
DRAFT – CONTENT SUBJECT TO CHANGE
CURRENT PROCESS
Std cost Simulation/ Freeze Finished goods
Enter WO
Attach PL/rtg
Report labor (Actual labor)
Issue materials P31113 Blend at 02 cost Others at 07 cost
WO completions
Input blend cost As 02 cost method In cost table
Std cost Simulation/ Freeze Finished goods
Mfg actg. R31802A Proof/final
var actg. R31804 Proof/final
FG cost method 07 Blend cost method 02
PROPOSED PROCESS
Std cost Simulation/ freeze
Enter WO
Attach PL/rtg
Report labor
Issue materials Blend at 02 cost Others at 07 cost
Wo completions
02 cost Rolled up & Variance Absorbed In FG lot
Mfg acctg. Proof/final
No variance journals
FG cost method 02 Blend cost mehtod 02


BUSINESS PROCESS – PURCHASING - AS IS PROCESS - AS OF 5/15/2013
DRAFT – CONTENT SUBJECT TO CHANGE
PURCHASING
MRP messages P3411
Extract buyer-Specific messages (B-ord/exp, O-ord, G-incr ord qty,L-decr ord qty, E-exp, D-defer, C-cancel
Review Excel output & filter messages
Release PO from Regular application (by manual entry)
Extract A-alert messages for Lot expiry date review/fixes
Dual maintenance of lot dates in legacy & JDE (till track 3)
Extract T-past due messages
Review past due orders and update purorders
Modify messages For qty/date
Process messages (PO not released yet)
Consolidate & Release PO
Review full truck Load limitation in single PO. (limitation till track-3)

COMPLETE LIST OF OBJECTS/REPORTS IN MANUFACTURING

Useful in roll-out projects.

AREA	Task	Task Name	Sys	Object Name	Form Name
INVENTORY	Inquiry	Item Ledger Inquiry (The CARDEX)	P41	P4111	
INVENTORY	Inquiry	Item ledger (running balance)	P41	P41112	
INVENTORY	Inquiry	Buyer's Information	P41	P4115	W4115A
INVENTORY	Inquiry	Item Search	P41	P41200	
INVENTORY	Inquiry	Item Search	P41	P41829	
INVENTORY	Process	Inventory Issues	P41	P4112	
INVENTORY	Process	Inventory Transfers	P41	P4113	
INVENTORY	Process	Inventory Adjustments	P41	P4114	
INVENTORY	Process	Item reclassification	P41	P4116	
INVENTORY	Process	Inventory Reclassifications	P41	P4116	W4116A
INVENTORY	Reports	Inventory Turn Report	R41	R41116	
INVENTORY	Reports	Buying Guide Report	R41	R4152	
INVENTORY	Reports	Stock Status Report	R41	R41530	
INVENTORY	Reports	Item Ledger Detail Report	R41	R41540	
INVENTORY	Reports	Inventory Journal Report	R41	R41550	
INVENTORY	Reports	Item Master Directory Report	R41	R41560	
INVENTORY	Reports	Inventory Valuation Analysis Report	R41	R41590	
MFG ACTG	Process	Mfg accounting	R31	R31802A	
MFG ACTG	Process	Mfg accounting-Final	R31	R31802A	

MFG ACTG	Process	Mfg accounting-Final -Scheduler	R31	R31802A	
MFG ACTG	Process	Mfg accounting- NO STATUS CHANGE	R31	R31802A	
MFG ACTG	Process	Variance accounting	R31	R31804	
MFG ACTG	Process	Variance accounting-Final	R31	R31804	
MFG ACTG	Process	Variance accounting-Final- Scheduler	R31	R31804	
MFG ACTG	Reports	Summary of Costs by Order	R31	R31401	
MFG ACTG	Reports	Material Price Variance	R31	R31425	
MFG ACTG	Reports	Material Usage Variance - Std	R31	R31426	
MFG ACTG	Reports	Labor Rate Variance	R31	R314271	
MFG ACTG	Reports	Labor Efficiency	R31	R31428	
MFG ACTG	Reports	Completed Order Valuation	R31	R31811	
MFG ACTG	Reports	WO Activity Amounts	R31	R31812A	
MFG ACTG	Reports	WO Activity Units	R31	R31812B	
MFG ACTG	Reports	Engineering Variance	R31	R31813	
MFG ACTG	Reports	Planned Variance	R31	R31814	
MFG ACTG	Reports	Material Usage Variance - Plan	R31	R31815	
MFG ACTG	Reports	Labor Efficiency Variances	R31	R31816	
MFG ACTG	Reports	Total/WIP and Other Variances	R31	R31817	
MFG ACTG	Reports	Completed Order Variances	R31	R31818	

MRP	Inquiry	Branch Relationships Chart	P34	P34031	
MRP	Inquiry	Pegging Inquiry	P34	P3412	
MRP	Inquiry	Time Series/ATP Inquiry	P34	P3413	
MRP	Inquiry	Review Forecast	P34	P34201	
MRP	Inquiry	Supply/Demand Inquiry	P40	P4021	
MRP	Inquiry	Detailed Availability	P41	P41202	
MRP	Inquiry	SO inquiry	P42	P4210	W4210E
MRP	Inquiry	SO inquiry	P42	P42101	W42101C
MRP	Inquiry	SO inquiry	P42	P42101	W42101D
MRP	Inquiry	PO Inquiry	P43	P4310	W4310G
MRP	OneView	One View Ave.Cost Analysis Item Ledger Inquir	P41	P41270	
MRP	OneView	One View Inventory Valuation Analysis Inquiry	P41	P41271	
MRP	OneView	One View Inv Cost Analysis By Item As Of Inqui	P41	P41272	
MRP	OneView	One View Item Location Trace	P41	P41273	
MRP	OneView	One View Work Order Cost Analysis	P48	P48270	W48270A
MRP	OneView	WO dispatch inquiry oneview	P48	P48280	W48280A
MRP	OneView	One View Planning Analysis Inquiry	P48	P48290	
MRP	Process	Planning Family Review	P34	P3401	
MRP	Process	Net Change Review - MPS/DRP	P34	P3402	
MRP	Process	Multi-Plant Detail Message Review	P34	P3411	
MRP	Process	Create Tansfer orders	P34	P3421	
MRP	Process	Blanket Order release	P43	P43032	

MRP	Process	Multi-Facility MRP Gross Regen	R34	R3482	
MRP	Process	Net Change MRP	R34	R3482	
MRP	Process	Multi-Facility MRP Gross Regen - Scheduler	R34	R3482	
MRP	Process	Net Change MRP- Scheduler	R34	R3482	
MRP	Process	Multi-Facility DRP Gross Regen	R34	R3483	
MRP	Process	Multi-Facility DRP net change	R34	R3483	
MRP	Reports	Refresh Work center Resource Units	R30	R3007G	
MRP	Reports	BOM Structure Analysis -Low level code	R30	R30601	
MRP	Reports	WO Repost Open Quantites	R31	R3190	
MRP	Reports	Load & Detail Messages Report	R33	R3350	
MRP	Reports	Period Summary Report	R33	R3352	
MRP	Reports	Detail Message Processing	R34	R3411	
MRP	Reports	Purge Supplier Schedule History	R34	R34460	
MRP	Reports	MPS Schedule & Message Detail Report	R34	R3450	
MRP	Reports	Pegging Report	R34	R3452	
MRP	Reports	Branch Relationships Report	R34	R3453	
MRP	Reports	Open SO by customer	R42	R42620	
MRP	Reports	Open SO by item	R42	R42632	
MRP	Reports	SALES ORDER REPOST	R42	R42995	
MRP	Reports	PURCHASE ORDER REPOST	R43	R43990	

MRP	Setup-Proc	Enter/Change Resource Profile	P33	P3303	
MRP	Setup-Proc	Supply & Demand Inclusion Rules	P34	P34004	
MRP	Setup-Proc	Branch Relationships Revisions	P34	P3403T	
MRP	Setup-Proc	Hold order constants	P42	P42090	
MRP	Process	Enter/Change Summary forecast	P34	P34200	
MRP	Process	Forecast entry	P34	P3460	
MRP	Process	Online Simulation	P34	P3461	
MRP	Reports	Summarize detailed forecast	R34	R34600	
MRP	Process	PO Generator	P43	P43011	
MRP-FORECAS	Reports	Forecast upload report	R34	R3460Z1I	
MRP-FORECAS	Reports	Purge Forecast Transactions	R34	R3460Z1P	
MRP-FORECAS	Reports	Force Changes	R34	R34610	
MRP-FORECAS	Reports	Extract Sales Order History	R34	R3465	
MRP-FORECAS	Reports	Create Detail Forecast - Proof	R34	R34650	
MRP-FORECAS	Setup	FC periods	P34	P3405	
MRP-FORECAS	Setup	FC by customer AB	P34	P3406	
PC	Inquiry	MFG G/L Journal Review - Batch Type "0"	P00	P0011	
PC	Inquiry	Costed components	P30	P30026	w30026c
PC	Inquiry	Costed Bill Inquiry	P30	P30206	W30206A
PC	Inquiry	Costed Routing Inquiry	P30	P30208	W30208A
PC	Process	Enter/Change Item Costs	P41	P4105	
PC	Process	Post to G/L - Batch Type "0" - MFG	R09	R09801	
PC	Process	Standard Cost Simulation	R30	R30812	
PC	Process	Standard Cost Simulation- Scheduler	R30	R30812	

PC	Process	Standard cost simulation-output	R30	R30825	csv enabled
PC	Process	Frozen Std Update-output	R30	R30834	csv enabled
PC	Process	Frozen Standard Update - Proof	R30	R30835	
PC	Process	Frozen Standard Update - Final	R30	R30835	
PC	Process	Frozen Standard Update - Final - Scheduler	R30	R30835	
PC	Process	WIP Revaluation - Final	R30	R30837	
PC	Process	WIP Revaluation - Proof	R30	R30837	
PC	Reports	Cost Components	R30	R30026P	
PC	Reports	Costed Bill	R30	R30440	
PC	Reports	Multi Level Costed Bill	R30	R30445A	
PC	Reports	Cost Integrity	R30	R30543	
PC	Reports	Costing Exceptions All Levels	R30	R30801	
PC	Reports	Reset Simulated Costs	R30	R30850	
PC	Reports	Copy Std. Cost Components Values	R30	R30890	
PC	Reports	Cost copy	R30	R30890	
PC	Reports	Unit Cost Warnings Report	R41	R41580	
PC	Setup	UDC 30/CA	P00	P0004A	30/CA
PC	Setup	UDC 30/CB	P00	P0004A	30/CB
PC	Setup	UDC 30/CO	P00	P0004A	30/CO
PC	Setup	Standard Rates	P00	P00191	
PC	Setup	DMAAI	P40	P40950	

PDM	Inquiry	Multi Level Bill Inquiry	P30	P30200	W30200C
PDM	Inquiry	Multi Level Where Used	P30	P30201	W30201B
PDM	Inquiry	Work Center Where Used	P30	P30202	W30202B
PDM	Inquiry	Bill of Material Comparison	P30	P30204	W30204A
PDM	Process	Enter/Change BU	P00	P0006	
PDM	Process	Address Book	P01	P0101SL	
PDM	Process	Enter/Change Bill	P30	P3002	W3002H
PDM	Process	Enter/Change Routing	P30	P3003	W3003C
PDM	Process	Enter/Change Work Center	P30	P3006	W3006F
PDM	Process	Manufacturing Constants	P30	P3009	W3009A
PDM	Process	Component locator	P30	P3015	
PDM	Process	Item Master	P41	P4101	W4101E
PDM	Process	Item Branch/Plant	P41	P41026	W41026E
PDM	Process	Item Cross-Reference	P41	P4104	W4101A
PDM	Process	Inbound Flat File Conversion	R47	R47002C	
PDM	Reports	Multi Level Where Used Item Report	R30	R30420	
PDM	Reports	Routing Report	R30	R30430	
PDM	Reports	Process Report	R30	R30435	
PDM	Reports	Bill Report	R30	R30460	
PDM	Reports	Where Used BOM Update - Proof	R30	R30520	
PDM	Reports	Where Used BOM Update - Final	R30	R30520	
PDM	Reports	WC Freeze	R30	R30860	
PDM	Setup-Proc	Next Numbers	P00	P0002	
PDM	Setup-Proc	Business units upload	P00	P0006Z	

PDM	Setup-Proc	Supplemental Data Setup	P00	P00091	
PDM	Setup-Proc	WO Supplemental Data Entry	P00	P00092	W00092D
PDM	Setup-Proc	Work Center Transaction Revisions	P30	P30006Z1	W30006Z1A
PDM	Setup-Proc	Bill of Material Transaction Revisions	P30	P3002Z1	
PDM	Setup-Proc	routing upload	P30	P3003z1	
PDM	Setup-Proc	ECO revision inquiry	P30	P30135	
PDM	Setup-Proc	Kanban Master Revisions	P30	P3016	
PDM	Setup-Proc	Enter/Change BU	P30	P30201O	
PDM	Setup-Proc	Enter/Change BU	P30	P30201S	
PDM	Setup-Proc	COBY: where produced	P30	P30210	
PDM	Setup-Proc	COBY: products	P30	P30211	
PDM	Setup-Proc	ECO review open tasks	P30	P30220	
PDM	Setup-Proc	ECO workbench	P30	P30225	
PDM	Setup-Proc	COBY: Resources	P30	P30240	
PDM	Setup-Proc	CO/BY product planning table	P34	P3404	
PDM	Setup-Proc	Doc type Maintenance	P40	P40040	
PDM	Setup-Proc	line type constants	P40	P40205	
PDM	Setup-Proc	DMAAI	P40	P40950	
PDM	Setup-Proc	Branch/Plant Location Master	P41	P4100	W4100C
PDM	Setup-Proc	branch constant	P41	P41001	W41001B
PDM	Setup-Proc	Unit of Measure	P41	**P41002**	
PDM	Setup-Proc	Standard UOM	P41	P41003	
PDM	Setup-Proc	speed location maintenance	P41	P4100A	
PDM	Setup-Proc	Unit of Measure	P41	**P410200**	
PDM	Setup-Proc	Item/Location Information	P41	P41024	
PDM	Setup-Proc	Leadtime Rollup	R30	R30822A	
PDM	Setup-Proc	Planned Yield Update	R30	R3093	
PDM	Setup-Proc	itembranch copy	R41	R41826	

PDM-UPL	Setup-Proc	Work Day Calendar Transactions	P00	P0007Z1	
PDM-UPL	Setup-Proc	Forecast upload	P34	P3460Z1	
PDM-UPL	Setup-Proc	Item upload	P41	P4101z1	
PDM-UPL	Setup-Proc	cost upload	P41	P4105z1	
PDM-UPL	Setup-Proc	Upload business units	R00	R0006ZI	
PDM-UPL	Setup-Proc	Upload work centers	R30	R30006Z1I	
PDM-UPL	Setup-Proc	bill upload batch	R30	R3002Z1i	
PDM-UPL	Setup-Proc	routing upload batch	R30	R3003Z1i	
PDM-UPL	Setup-Proc	Item upload batch	R41	R4101z1i	
PDM-UPL	Setup-Proc	cost upload batch	R41	R4105Z1i	
PDM-UPL	Setup-Proc	Routing inbound	R55	R553003z1	
QUALITY	Inquiry	Tested Lot Search	P37	P37200	W37200A
QUALITY	Inquiry	Trace Test Results	P37	P37201	W37201D
QUALITY	Inquiry	Test Results Inquiry	P37	P37204	W37204B
QUALITY	Inquiry	Lot Trace/Track Inquiry	P41	P41203	W41203D
QUALITY	Inquiry	Lot Master Availability	P41	P41280	W41280B
QUALITY	Process	Test Revisions	P37	P3701	W3701D
QUALITY	Process	Specification Revisions	P37	P3702	W3702A
QUALITY	Process	Nonconforming Product	P37	P3703	W3703A
QUALITY	Process	Enter Test Results	P37	P3711	W3711A
QUALITY	Process	Test/Specification Where Used	P37	P37202	
QUALITY	Process	Test Results Workbench	P37	P37203	
QUALITY	Process	Purge of Test Results Transactions	R37	R3711Z1P	
QUALITY	Process	TEST RESULT WORKSHEET	R37	R37470	
QUALITY	Process	Certificate of Analysis - Extract	R37	R37900	
QUALITY	Process	Hold Expired Lots Status Update - Proof	R41	R41082	
QUALITY	Process	Hold Expired Lots Status Update - Final	R41	R41082	
QUALITY	Process	Update Effective Lots - Proof	R41	R41083	
QUALITY	Process	Update Effective Lots - Update	R41	R41083	
QUALITY	Process	Inbound Test Results Flat File Conv.	R47	R47002C	
QUALITY	Report	Product Test Report	R37	R37450	
QUALITY	Report	Product Test Report -EXTRACT	R37	R37901	
QUALITY	Reports	Test Definition Report	R37	R37410	
QUALITY	Reports	Specifications Report	R37	R37415	
QUALITY	Reports	Item Test Specifications	R37	R37420	
QUALITY	Reports	Certificate of Analysis	R37	R37460	
QUALITY	Reports	Lot Trace/Track Report	R41	R41505	

QUALITY	Setup	Approvals Workbench	P37	P37300	
QUALITY	Setup	Preference Master	P40	P40070	W40070C
QUALITY	Setup	Quality Preference Revisions	P40	P40318	W40318A
QUALITY	Setup	Item/Lot Information Revisions	P41	P41024	
QUALITY	Setup	Lot Master Revisions	P41	P4108	W4108B
QUALITY	Setup	Allowed Lot Status Setup	P41	P41081	W41081A
QUALITY	Setup	Activate Quality Management	P99	P99410	
SFC	Inquiry	WC load review	E31	E313000	
SFC	Inquiry	WC where used	P30	P30203	
SFC	Inquiry	Part Useability	P30	P30212	
SFC	Inquiry	Production Cost Inquiry	P31	P31022	W31022A
SFC	Inquiry	GL by WO number	P31	P31061	
SFC	Inquiry	GL review by WO	P31	P3106I	
SFC	Inquiry	Summarized WO	P31	P3108	
SFC	Inquiry	Order Hours Status	P31	P31121	W31121A
SFC	Inquiry	Order Quantities Status	P31	P31122	W31122B
SFC	Inquiry	Operation Quantity Inquiry	P31	P31124	
SFC	Inquiry	Shortage Workbench	P31	P3118	W3118C
SFC	Inquiry	Parts List Inquiry	P31	P3121	W3121A
SFC	Inquiry	Dispatch List	P31	P31220	W31220B
SFC	Inquiry	Work Center Schedule Review	P31	P31224	W31224B
SFC	Inquiry	Production Status inquiry	p31	p31226	W31226F
SFC	Inquiry	Production History	P31	P31227	W31227B
SFC	Inquiry	SO to WS interface	p42	p4210	
SFC	Inquiry	WO search and select	P48	P48022	
SFC	Process	**Assembly Serial Numbers**	P31	P3105	
SFC	Process	**SN association**	P31	P3107	
SFC	Process	Work Order Parts List	P31	P3111	
SFC	Process	Inventory Issues	P31	P31113	W31113H
SFC	Process	Full Completion	P31	P31114	W3114A
SFC	Process	Component Scrap	P31	P31116	
SFC	Process	Work Order Routing	P31	P3112	
SFC	Process	WO labor entry	P31	P311221	W311221B
SFC	Process	Super Backflush	P31	P31123	W31123B
SFC	Process	Shop Floor Workbench	P31	P31225	W31225D
SFC	Process	Kanban Consumption	P31	P3157	
SFC	Process	Kanban Supply	P31	P3157	
SFC	Process	Outside Operation Revision	P31	P3161	
SFC	Process	Work Order Mass Update	P43	P43090	W48022A
SFC	Process	WO ENTRY -other types	P48	P48013	W48013J
SFC	Process	WO ENTRY	P48	P48013	W48013J

SFC	Process	Enter/Change BU	P48	P48201	
SFC	Process	Work Order Mass Update Template	P48	P48710	W48710A
SFC	Reports	Refresh Resource Units	R30	R3007G	
SFC	Reports	All Shortages	R31	R3118P	
SFC	Reports	Hours and Quantities Proof	R31	R31322	
SFC	Reports	Work Order Summary	R31	R31400	
SFC	Reports	Generate & Print Work Orders	R31	R31410	
SFC	Reports	Generate & Print reprint	R31	R31410	
SFC	Reports	WO print	R31	R31415	
SFC	Reports	WO material requirement	R31	R31418	
SFC	Reports	Hours and Quantities Update	R31	R31422	
SFC	Reports	Dispatch List	R31	R31435	
SFC	Reports	Supply/Demand Report	R40	R4051	
SFC	Reports	Work Order Purge	R48	R4801P	
SFC	Setup-Proc	Shop Floor Calendar	P00	P00071	
SFC	Setup-Proc	Enter/Change Resource Units	P30	P3007	
SFC	Setup-Proc	SO with WO interface	P42	P4210	
SFC	Setup-Proc	WO activity rules	P48	P4826	

About the Author:

Mathur (matt) Ravikumar, an author, consultant, and political/economic cartoonist

Matt started his own consulting company in 2012 and provide functional consulting in enterprise resource planning business software applications.

He has self-published 30+ books over many years (including three books on Oracle's JD Edwards ERP software manufacturing applications).

He also publishes weekly cartoon content on political and economic news and events in YouTube Channel. Two of his Udemy lessons have been released, one on entrepreneurship and another on self-publishing. Four of self-published books have been released into audio format, available in audible and itunes.

Regular meditator and trekked partially to Himalayas (Mount Kailash) towards a spiritual journey in 2016.

He is passionate about writing, especially on the subjects that can teach life's lessons. He like to mentor others and find their talent sitting dormant inside.

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LIST OF PUBLICATIONS

	About the Author - List of Publications	
	Technical Books	
1	Implementing Oracle JDE Orchestrator	March 31, 2026
2	Implementing Oracle JDE Project Case Studies	March 31, 2026
3	Implementing Oracle JDE UDOs	March 15, 2025
4	Implementing Oracle JDE Manufacturing Tip & Tricks	May 28, 2018
5	Implementing Oracle JDE Manufacturing	July 20, 2017

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