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On Financials/Job Costs

Change Management and Job Cost Budgets

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E1Editor's Note: *We all know that any project is subject to changes throughout its lifecycle. And those changes need to be made, approved, and tracked so that they provide a detailed audit trail. Fortunately, we have people, like Bob DeMartino, who can provide us with an approach to track such changes using the Change Management module. Bob steps us through what this module is capable of and how it can be applied to Job Cost budgets, including a sample scenario to illustrate the effectiveness of this approach.*

This paper will describe a simple approach to using the JD Edwards® Change Management module to track changes to Job Cost budgets. Entries made within Change Management can also affect General Accounting by creating transactional entries to the JA (Job Cost Budget) ledger, thus establishing an audit trail. Contract and Service Billing as well as Subcontract Management can also be updated with any changes enabling these modules to have an audit trail as well.

Entries made within Change Management can also affect General Accounting by creating transactional entries to the JA (Job Cost Budget) ledger, thus establishing an audit trail.

The Change Management system also allows you to:

- Sequentially number Change Requests
- Group Change Requests by type or category
- Record Change Requests as memos before final approval
- Record three different levels of change: original, quoted, and final
- Calculate the "Best" value of original, quoted, or final
- Change the statuses of Change Requests, Planned Change Orders, and Change Orders

Although this article has been written for JD Edwards Version 9.0, it applies to all versions of EnterpriseOne®.

Before we begin, we need to look at the setup.

Setup

The setup involves establishing appropriate User Defined Codes for statuses, priorities, types, etc., to be used when creating a change and following it through to its completion. Also, an Automatic Accounting Instruction (CMxx) is needed when passing changes to the Subcontract Management system.



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User Defined Codes

There are several User Defined Codes (UDCs) that we need to address. These tables, shown in the Demo, contain all of the codes needed to demonstrate the Change Management system. They may be added to or changed as needed. We will be using these codes later on in the exercise as we create Change Requests, Planned Change Orders, and Change Orders.

Go to Change Management → Change Management System Setup → Change Management User Defined Codes.

Click on the first menu option: **Change Request Header Status**. UDC 53/ST in Figure 1 contains a list of codes that can be assigned to a Change Request to indicate the status of the change.

Codes	Description 01	Description 02	Special Handling	Hard Coded
.	.	.	.	N
1	Incorporated in Change Order	Updates Revised Budget	.	N
2	Committed Out of Scope	.	.	N
3	Proceed in Scope	.	.	N
4	Proceed Out of Scope	.	.	N
5	Anticipated in Scope	.	.	N
6	Anticipated Other Estimate	.	.	N
7	Potential Out of Scope	.	.	N
A	Approved Request	.	.	N
C	Cancelled Request	.	.	N

Figure 1: Status Codes

Click **Close** to return to the main menu.

Click on the next menu option: **Change Request Priority**. UDC 53/PR in Figure 2 is used to indicate the importance of the Change Request.

Codes	Description 01	Description 02	Special Handling	Hard Coded
H	High	.	.	.
L	Low	.	.	.
M	Medium	.	.	.
U	Urgent	.	.	.

Figure 2: Priority Codes

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