



Employee Time Entry with Equipment: Set Up and Time Entry Steps

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Editor's Note: In this article, Richard follows up his previous article on Standalone Employee Time Entry (available in the JDEtips Document Library as of May 2004) with another article that fills in with more detail on time entry with equipment. An employee may spend time on a job using one or more pieces of the company's equipment, perhaps for testing, repair, or construction purposes. The time entry module allows both the employee's own time and the equipment time to be entered using the same screen.

Introduction

This article is a follow-on from the article on employee time entry released in the May/June 2004 issue of *JDEtips*. In that article, we discussed the setup of the employee master, billing rate tables, AAls, and Processing Options for employee time entry. We will take this a little farther now and consider employee and equipment time entry using employee time entry.

There are other ways to enter equipment time; we can use equipment time billing and equipment location billing. This article shows that there is a third option — using employee time entry.

Typically, this feature might be used where an employee spends time on a job and takes along one or more items of equipment for testing or repair purposes. For example, a computer technician may take sophisticated testing equipment, a vehicle recovery mechanic may use a tow truck, or a mobile crane operator may attend a construction site along with a crane. This module allows the employee to enter equipment usage time along with personal work time.

Equipment Master

When you are entering employee time, there may be two pieces of equipment involved. Indeed, there may be more than two pieces involved. There will be the customer's equipment, and there will be your own equipment that you used to test or mend the customer's equipment. So the JDE® time entry system distinguishes between 'equipment worked on' (the customer's equipment) and 'equipment worked' (your own equipment). There could be several items of 'equipment worked'.

Work Orders

When work is performed on a customer's equipment, it is likely that a Maintenance Work Order would be raised. The Work Order can contain a great deal of information about the maintenance task, including accounting information:

- Work Order number
- Equipment number
- Expense BU
- Repair code (subsidiary)



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When we are entering time, it should be sufficient to enter the WO number for the system to be able to retrieve the information found in the WO. Since the WO contains all the accounting information we need, we should not have to enter all the same information again into the time entry screen. The time entry screen therefore allows us to enter the WO number as a shortcut. All accounting information will default from the WO.

Costing

When we perform work on the customer's equipment, we will charge the cost of the employee time to the equipment, along with the cost of using maintenance or test equipment. This will give us good information about how much it costs to maintain the customer's equipment. At the same time, if we use our own equipment during the maintenance job, we would want to credit the 'equipment worked'. This could be regarded as 'rental revenue' or cost recovery. The more we use our own equipment, the more 'revenue' is generated by that equipment. We can get an idea of how hard our own equipment has been working by looking at equipment revenue.

Note that when we talk about 'revenue' we are referring purely to internal charging. We debit the customer's equipment and we credit our own equipment for internal management reporting. If we really wanted to charge a customer for the maintenance work done on his equipment, we can use service billing to raise an invoice. Employee time and equipment rental can then be charged to the customer. Billing falls outside of the scope of this paper.

Example

As a case study, we will assume the following:

1. Our company is "Project Management Company", company 00050 in the standard JDE demo data.
2. Our business is in the maintenance of customers' equipment.
3. We set up customers' equipment in our Fixed Assets system.
4. Our customer has one piece of equipment, set up in our system as asset number 4.
5. We have technicians of varying levels of experience. Mr. Jones is a Junior Technician.
6. Expenses related to maintenance calls are collected in the customer service BU, CUSTSERV. These expenses include recharged technician time, parts, recharged equipment time and third party contract maintenance charges. In this paper we are only interested in recharged technician and equipment time.
7. All technicians work for the SHOP. This is their home BU. Their salaries get charged to this BU. If they are engaged on any maintenance or repair job the SHOP receives a credit for their recharged salaries. Basically, therefore, recharged salaries are debited to CUSTSERV and credited to SHOP.
8. All test equipment is under the responsible BU, YARD. Depreciation is charged to this BU. YARD receives a credit when test equipment is used on any maintenance or repair job. Recharged equipment time is debited to CUSTSERV and credited to YARD.

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