

JD Edwards Machine Management Case Study

Project: Implement a solution to meet the Machine Management requirements on JDE 8.12

Industry: Government

Business Challenges:

This consortium is a group of local government municipalities. They maintain the JD Edwards software for all the local government members within one facility. Each Local Government has their own environment, however there are standards that are used over all environments. One of the local governments required a solution to convert their existing Fleet Management data (work orders, purchase orders and Inventory control) into JD Edwards. This particular local government was already on JD Edwards software for Financials and Fixed Assets. Equipment Management had not been used at any other local government. The challenge was to incorporate the Equipment Management, Purchasing, and Inventory Management into existing business processes for the specific local government as well as create standards for use to implement at any other government locations. Fixed Assets had already been implemented so utilizing existing asset structure for use with tracking with equipment work orders was a concern as the data on the assets in JD Edwards did not match what was in the Fleet system. All machine history, cost of parts, fuel and service charges had to be moved from Fleet into JD Edwards.

High Level Business Solution:

After analyzing system standards, legacy systems, business processes and specific local government requirements, a solution was created. The solution incorporated standards for implementing Equipment Work Orders, Purchase Orders, Inventory Management, conversion for historical data for existing machines and a fuel file interface into the JDE Inventory system. Standards were created for labor and service fees for ease of use in the work order entry process. Purchase orders were set up to be distinguished between purchases for specific work orders/outside services/non-stock items and inventory purchases to stock inventory. Replenishments were set up to notify when inventory levels were low. Work orders scheduling was set up so that management of the work flow was visible. Inventory issues to departments were set up so that the work order system could record costs to the specific departments.

Business/Technical Solution Details:

- Configured Purchase Order Document types and Order Activity Rules to distinguish purchasing for inventory from outside purchases recorded directly to the repair work order.
- Configured Repair Work Orders to be recorded to the specific equipment/department.
- Configured work orders to record inventory issues to departments for supplies through set up of GLClass UDC, Vendor Set up and Distribution Automatic Accounting Instructions.
- Configured Work Order Activity Rules for compliance with processing work flow.
- Wrote specifications / data mapping for customization on Work Order entry form to include repair codes.

- Configured separate warehouses for tracking fuel inventory separately from parts inventory.
- Configured inventory for tracking by fuel and parts by commodity code (e.g. fuel, batteries, axles).
- Set up non-stock parts and standards for labor and service fees.
- Configured Branch Plant Constants, Manufacturing Constants and Shop Floor calendar to meet business requirements.
- Set up new accounts for recording costs to new departments and accounts, within existing Chart of Accounts.
- Analyzed assets in both systems and cleaned up data for duplicates and non-depreciable assets.
- Wrote specifications and data maps for converting history from old repair accounts to new accounts after analyses and cleaning up data in Fleet system.
- Set up new inventory accounts to separate converted inventory of “Go-Live” Count from existing inventory balance.
- Wrote specs and mapping for converting inventory balances.
- Configured AAIs for all new processes in inventory, purchasing and fixed assets.
- Configured Fixed Assets System for Non-Depreciable assets used in the Maintenance process (e.g. weed eaters, lawn mowers)
- Configured menus for all business processes and departments.
- Conducted knowledge transfer and trained associates on new system.
- Wrote specifications and data mappings for fuel inventory interface from fuel pump system.
- Configured Vendors and tax set up for sales tax to default onto purchase orders.