

	Project: Certify Workdone Request Automation(Phase2) Type of Document: Functional Specification	
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Functional Specification for Certify Workdone Request Automation Enhancement (Phase 2)

Version 3.0

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Prepared By:

BCplus Solutions Limited

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Document Control

Revision History

Version	Revision Date	Author	Change Summary	Sections Changed
V1	5-Aug-2025	Kelvin	Creation	All
V2	8-Aug-2025	Kelvin	Field changes	4.5
V3	14-Aug-2025	Kelvin	Wording Change, not send to requester for R590219	See content highlighted in yellow

Reviewed and Approved By

Name	Responsibility	Date	Version

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A. Introduction

1. Purpose

Develop a series of programs to support the Certify Workdone Request Automation.

2. Audience

- Consultants
- Department Managers
- Project Team
- Developers

3. Major Scope of Work

The major working items for this enhancement are as follows:

- Certify Workdone Request Action Notification (JDE UBE with Formscape)
- Monthly Certify Workdone Request Summary for Sub-Con (JDE UBE with Formscape)

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B. Details

4. Certify Workdone Request Action Notification UBE (R590219)

4.1. Purpose

- 4.1.1 Output the Certify Workdone Request information for Formscape to use to compose email to notify the related recipient for further action.

4.2. Processing Option

- 4.2.1 Send Email Flag : 1 = Send, 0 = Not Send
- 4.2.2 Who's Who Type Code for Approver
- 4.2.3 Sender Email Address
- 4.2.4 CC Email Address

4.3. Data Selection

- 4.3.1 Certify Workdone Request Status = 30 (BU Approval) or 40 (UBR approval) or 35 (UBR Hold)
- 4.3.2 Notification Flag (F590213C.GFL3) = Blank
- 4.3.3 Company = [user input value from data selection]

4.4. Data Sequencing

- 4.4.1 Recipient Address Number (Approver # if status = 30/40, Job PM # if status=35)
- 4.4.2 Certify Workdone Request Status
- 4.4.3 Certify Workdone Request Number

4.5. Logic

- 4.5.1 Report output will be in csv format.
- 4.5.2 Based on search type "E" to retrieve the
 - Approver Email
 - Approver Contact Name (Who's Who Alpha Name)
 - Job PM Email
 - Job PM Contact Name (Who's Who Alpha Name)

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4.5.3 Based on the Certify Workdone Request Status to set the Job PM Email Address

- Certify Workdone Request Status = 30/40, set to Approver Email
- Certify Workdone Request Status = 35, set to Job PM Email

4.5.4 Determine the Action Type for every Certify Workdone Request

- Set to “Email” if all of the below conditions met; Otherwise set it to “Display”
 - Send Email Flag = 1
 - Sender Email Address is not blank
 - Job PM Email Address is not blank

4.5.5 If the Action Type is “Email”, update the Notification Flag (F590213C .GFL3) for that Certify Workdone Request to “Y”. Otherwise, no update is required.

4.5.6 Group the processed Certify Workdone Requests by the Recipient Email Address and output the data to Formscape for email handling. The Certify Workdone Requests that required the recipient to perform BU Approval/ UBR Approval/ Check the Emailed Supporting to D1/D2 Approval Flag will be group together and email to the recipient by 1 email.

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4.5.7 The information below will be output to the report and also sent to FormScape for email processing. A records will be written to the customized table “Certify Workdone Request Email Notification Log” (F590214) as an audit trail.

1. Execute User (EDUS) 2. Execute Batch Number (EDBT) 3. Transaction Number (EDTN) 4. Transaction Line (EDLN) 5. Execute Date (DX) 6. Execute Time (EXT) 7. Certify Workdone Request Unique ID (PRUKID) 8. Company (CO) 9. Batch Period (PNM01) 10. Batch Number (BATCHN) 11. Enable Email Flag (ENABL) 12. Send Email (EMAILF) 13. Action (ACTYP) 14. Certify Workdone Request Number (CTLID) 15. Sub-Con Address Number (AN8) 16. Job Number (MCU) 17. Order Company (KCOO) 18. Order Type (DCTO) 19. Order Number (DOCO) 20. Order Suffix (SFXO)	21. Certify Workdone Request Create Date(ODRJ) 22. Notification Date (NOTJ) 23. Recipient Email Address (57TEML) 24. Recipient CC Email Address (57CEML) 25. CHK CC Email (ENEM) 26. Email Address for Batch Summary (AEMAIL) 27. Remarks (REM1) 28. Currency Mode (CRRM) 29. Currency Code (CRCD) 30. Exchange Rate (CRR) 31. Total Certified WD Amount (BA01) 32. Total Retention Amount (BA02) 33. Total Contra Charge Amount (BA03) 34. Total EC Amount (BA04) 35. Total Net CWD Amount (BA10)
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5. Certify Workdone Request Action Notification (FormScape)

5.1. Purpose

- 5.1.1 Based on the data from “Certify Workdone Request Action Notification” to send email notification to the recipient.

5.2. Logic

- 5.2.1 Create a new transform definition to transform the JDE data for FormScape processing.
- 5.2.2 If Send Email Flag = 1, Sender Email is not blank and Recipient Email is not blank, send email to the recipient.
- For every Recipient
 - If Recipient Email Address is not blank
 - Compose an email with below information and send to the recipient email address.
 - To = Recipient Email Address
 - Subject: Certify Workdone Request Pending for Your Action.
 - Body:

Dear [Recipient Name],

The below Certify Workdone Request is pending for your action.

Show below information for every Certify Workdone Request in row by row format

<u>Company</u> Batch Period Certify Workdone Request Batch Number Certify Workdone Request Number Request Status (BU Approval/ UBR Approval/ Email Supporting to D1/D2 Approver) Certify Workdone Amount <u>per CWD</u> Net CWD Amount <u>per CWD</u>	Create By Create Date Sub-Con Address Number Sub-Con Name Order Company Order Type Order Number
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6. Monthly Certify Workdone Request Summary for Sub-Con UBE (R590220)

6.1. Purpose

- 6.1.1 Output the Certify Workdone Request information for Formscape to use to compose an email to notify the Sub-Con about the Certify Workdone Requests being sent to her company in previous month.

6.2. Processing Option

- 6.2.1 Send Email Flag : 1 = Send, 0 = Not Send
- 6.2.2 Who's Who Type Code for Sub-Con Email Information
- 6.2.3 Sender Email Address
- 6.2.4 CC Email Address
- 6.2.5 Notification Period Start Date

6.3. Data Selection

- 6.3.1 Certify Workdone Request Status = >60 (Sub-Con Notified)
- 6.3.2 Company = [user input value from data selection]

6.4. Data Sequencing

- 6.4.1 Sub-Con Number
- 6.4.2 Notification Date
- 6.4.3 Certify Workdone Request Number

6.5. Logic

- 6.5.1 Report output will be in csv format.
- 6.5.2 If Notification Period Start Date is entered in the processing option, retrieve the Certify Workdone Requests where the notification date is in that year and month. Otherwise, retrieve the Certify Workdone Requests where the notification date is in the previous month (based on the current date).
- 6.5.3 Based on the Who's Who Type Code defined in processing option to retrieve the
 - Sub-Con Email
 - Sub-Con Contact Name (Who's Who Attention To)
- 6.5.4 Program will only sent the Certify Workdone Request Summary to Sub-Con when below conditions are all met.
 - Send Email Flag = 1

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- Sender Email Address is not blank
- Sub-Con Email Address is not blank

6.5.5 The email is sent out per Sub-Con number. Program will group the Certify Workdone Request by Sub-Con number, and email the information of those Certify Workdone Requests to Sub-Con by 1 email.

6.5.6 The below data will be output to csv file and also sent to FormScape for email processing.

1. Certify Workdone Request Number 2. Sub-Con Address Number 3. Sub-Con Name 4. Order Company 5. Order Type 6. Order Number	7. Notification Send Date 8. Send to Email Address 9. Total Request Amount per CWD Request 10. Total Retention Amount per CWD Request 11. Total Contra Charge Amount per CWD Request 12. Total EC Amount per CWD Request 13. Total Net CWD Amount per CWD Request
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7. Monthly Certify Workdone Request Summary Notification for Sub-Con (FormScape)

7.1. Purpose

- 7.1.1 Based on the data from “Monthly Certify Workdone Request Summary for Sub-Con UBE” to send an email with Certify Workdone Request Summary to the Sub-Con.

7.2. Logic

- 7.2.1 Create a new transform definition to transform the JDE data for FormScape processing.
- 7.2.2 If Send Email Flag = 1, Sender Email is not blank and Sub-Con Email is not blank, send an email to the Sub-Con.
- For every Sub-Con
 - If Sub-Con Email Address is not blank
 - Compose an email with below information and send to the Sub-Con email address.
 - To = Sub-Con Email Address
 - Subject: Certify Workdone Request Summary Sent in [YYYY]-[MM]
 - Body:

Dear [Sub-Con Name],

The below Certify Workdone Requests have been sent to your company for invoicing.

Show below information for every Certify Workdone Request in row by row format

1. Certify Workdone Request Number 2. Sub-Con Address Number 3. Sub-Con Name 4. Order Company 5. Order Type 6. Order Number 7. Notification Send Date 8. Send to Email Address	9. Total Request Amount per CWD Request 10. Total Retention Amount per CWD Request 11. Total Contra Charge Amount per CWD Request 12. Total EC Amount per CWD Request 13. Total Net CWD Amount per CWD Request
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