Oracle® Utilities Work and Asset Management

User Guide

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Oracle® Utilities Work and Asset Management User Guide for Release 1.9.1.1

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Preface

This document provides you with a general overview of the documentation and how it is intended to be used. Please refer to New Content for this Release for more specific information on the current release.

Audience

The user guide documentation is intended for general users of the Oracle Utilities Work and Asset Management system.

Printed/Electronic User Guides

There are several User Guide sections: a system overview book and one book describing Compatible Units functionality, and one book for each of the subsystems in the application: Resource, Maintenance, Purchasing, Inventory, Customer, Enterprise and Administration. There are also supplemental guides for Business Rules, Reports, and Transaction Codes.

The overview section covers basic system features that are similar regardless of where you are in the system: operational concepts, how to find the record you need, shortcuts to different areas in the system, and similar tips. It also covers the home page, your personal workspace, where you can receive and send messages, and save searches and search results.

Each guide follows the subsystem and module organization of the application. If you have a question about a particular window, you can reference the appropriate subsystem guide, find the module, and browse through the discussion of each window.

Note: In order to locate text in the User's Guide that you are viewing, select Find from Acrobat Reader's Edit menu. You can also press Ctrl+F on the keyboard. In order to search for text in ALL of the User Guides simultaneously, select Search from the Edit menu and select Query from the sub-menu. You can also press Ctrl+Shift+F.

Please also use the Table of Contents and the Index to locate topics quickly.

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Online Help

There are two types of online Help available.

- **Online User Guides** include detailed descriptions of concepts, how the various pieces of the system fit together, what important fields mean and more. To open the User Guides, select Help from the menu then select User Guides.
- **Cue Cards** are step-by-step procedures that guide you through the completion of specific tasks. To open Cue Cards, select Help from the menu then select Cue Cards.

Context Sensitive Help

Users can also get online help based on a specific function or screen. This is referred to as context-sensitive help.

When you are viewing any window, select either User Guides or Cue Cards from the Help menu to open the online Help topics for that window. You can also use the tabs at the top of the Help window to search for the information you need.

- The **Contents** tab displays the online Help Table of Contents arranged by subsystem and major topic.
- The **Index** tab displays a searchable list of every topic in online Help.
- The **Search** tab displays a special window where you can look for keyword combinations in online Help.

In addition, most Help topics contain hypertext links to other topics. Click any underlined link to read more about these topics.

Note: When you are using the application, online Help is the fastest way to get information that you need. All of the information contained in printed User Guides, can also be found in online Help.

Using Online Help

1. **Locate the topic you need help about via the Contents tab, Index tab, or Search tab.**
   - The **Contents** tab allows users to expand/collapse sections of the table of contents as needed to find a particular topic. Click on the book icons (and) to open/close headings. Click on the topic icon ( )to open it.
   - The **Index** tab allows the user to browse an index for the online help. Click on the index entry for the topic to open it.
   - The **Search** tab allows the user to search the online help for specific words. Enter the word for the search in the text box and click **Go!** The search results appear beneath the text box. Click on the topic to open it.
2. The selected topic will appear in the right pane of the online help window.

Help Icons

A number of icons appear along the top of the online help window. These icons are used for navigating the online help and other functions. These icons perform the following functions:

Icon	Description
	Show Navigation: Open the navigation frame. Used after opening a single help topic.
	Previous: Display the previous help topic.
	Next: Display the next help topic.
	Show in Contents: Expand the Contents tab to display the current topic.
	Print: Print the current topic.

Related Documents

For more information, see the following documents in the Oracle Utilities Work and Asset Management Release 1.9.1.1 documentation set:

- Oracle Utilities Work and Asset Management Release Notes
- Oracle Utilities Work and Asset Management Configuration Guide
- Oracle Utilities Work and Asset Management Customization Guide
- Oracle Utilities Work and Asset Management Installation Guide

What's New

This section describes the major features and functionality changes in the application that were added to this documentation release.

New Content for this Release

The following issues and enhancements were modified in the documentation for this release.

- Updated processing so that when receiving a PO item on a barcode device, the list of purchase orders and items better reflects what has already been received. Also added processing so that users can print the issue ticket when issuing a ticket from the Checkouts/Returns module.
- Added processing to include a cancelation reason for work orders when applicable. If the work order status is set to "Cancel" a dialog box opens prompting for a reason.
- Added functionality so that users can set a default export type for exporting files. Set default export file type by changing preferences in your user profile.
- Changed processing so that work order tasks cannot be canceled if they have associated child records. An active work order task cannot be canceled if related pending records exist in checkout request, cost adjustment, direct charges, invoice, purchase order, requisition, or timesheet.
- Updated processing so that when a requisition or purchase order is copied using Copy Record, the system uses the most current unit price and other details from line item storeroom records rather than using possibly outdated information from the existing purchasing record.
- Added additional options to the Copy Requisition wizard to allow the user to decide whether to copy notes and attachments.
- Added an optional validation on blanket contracts. Depending on the setting of the Check BPO Limit rule key on the Purchasing Options business rule, users will receive a warning message whenever a Requisition, Purchase Order or Change Order reaches the limit of the Used Amount on an associated blanket contract.
- Added user-defined fields to Cost Adjustments.
- Added a new Asset Inspection Data business rule to set a default aging factor that the system uses when no values have been set in the Aging Factors module.
- Added a View button on the Bill of Materials Drawing Documents screen to allow easy access to opening the drawing attachment.
- Added project and subproject search fields to work order task so that users can search tasks by project ID.

- Updated processing so that an asterisk displays next to the service request asset list if there is an associated asset.
- Increased the number of digits in the data reading field for asset Operational Tolerances. Also added user-defined fields to this module.
- Added reported by and date fields to work order task. These were also added to the search options screen so that tasks can be searched by these values.
- Added additional search fields on the work order history search options:
  - Report Codes (1-5)
  - Backlog Group
  - Crew
  - Work Priority
  - Required Date
  - Work Description

Content from Prior Release

These changes were delivered in Release 1.9.1, but are included here for convenience:

Documentation Updates

- Added more detail to describe the Meter Reading interface.
- Added additional detail to describe overhead processing in Regulatory Account.
- Added SDBT_BI Triggers to the Business Intelligence guide.

Application Enhancements

Please refer to the linked user guide sections or release notes for more information on these items.

- Added functionality so that a "weight" based on categories can be included in asset inspection scores. The Asset Class module was modified and two modules were added to support this functionality: Aging Factors and Asset Class Weighting.
- Added a clerk field to the Invoicing and Invoice Batchheader.
- Added copying of UDFs between requisitions and blanket contracts. Configure the UDFs - Auto Copy Across Modules Rule to enable this functionality.
- Added the option to use the shipping address instead of the billing address on the Request for Quotes Report.
- Added Project/Subproject fields to the Work Request header.
- Added options to the Work Order Processing Rule so that business processing can either restrict or not restrict the material list by Equipment Group and Unit Size on a work order task when evoking the Add Dependent Materials action.
- Added functionality which requires a reason code when a Work Order is rejected for approval. The system enters the reason in the approval log with the rest of the approval details.
- Added functionality so that approval comments for a Work Request can be controlled by a list of values if required by your business processing. This is set in the Work Request Processing Rule.
- Added Work Class and Work Category as search fields in the Scheduling modules.

- Added Created By and Last Updated By information to all Notes views.
- Added the asset description to the results of search for work orders, work order tasks and work requests.
- Added Export Data functionality to all screens.
- Added business rule processing so to control how service history is updated on work orders. This is controlled in the Work Order Processing Rule with the Update Service History rule key.
- Added more responsibility functions to control actions in the purchase order, invoice batch, and multi-step receiving modules.

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