

Oracle® Depot Repair

Implementation Guide

Release 11i

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Implementing Oracle Depot Repair

This document provides descriptions of the setup and configuration tasks required to implement the application successfully.

Topics covered are:

- [Implementation Overview](#)
- [Implementation Steps](#)

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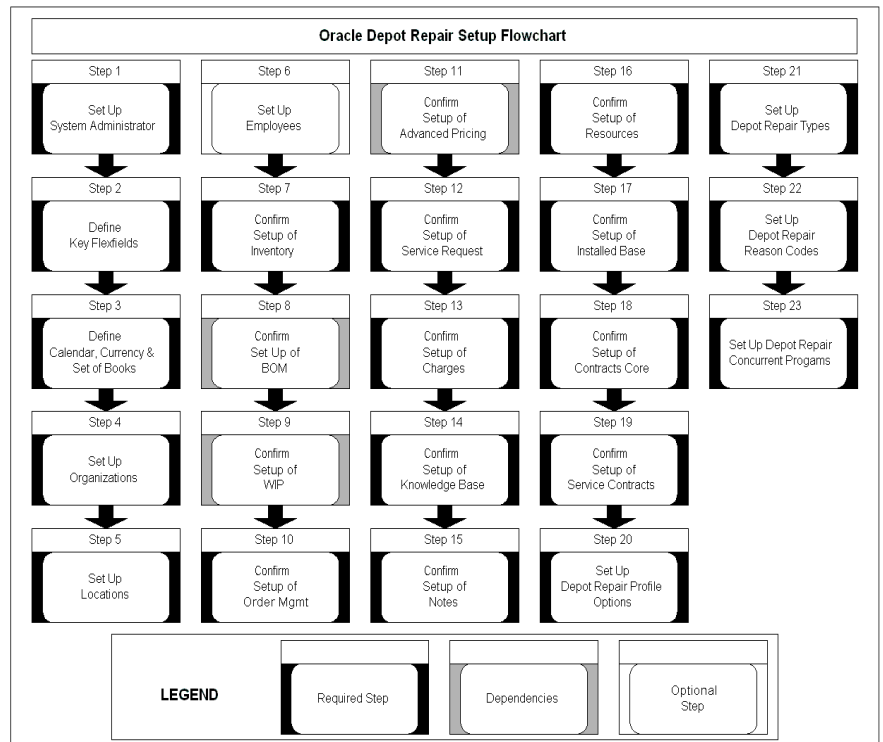
Implementation Overview

Before setting up Oracle Depot Repair, you must install and fully implement several Oracle applications or components as outlined in the implementation flowchart.

For information regarding the installation and implementation of these applications, see the appropriate documentation.

Implementation Flowchart

Although you can set up Oracle Depot Repair in many different ways, Oracle recommends the steps and the order of steps shown in the following flowchart.



Implementation Checklist

Complete the following steps in the recommended order.

- Step 1 (Required) Set Up System Administrator
- Step 2 (Required) Set Up Key Flexfields
- Step 3 (Required) Set Up Calendars, Currencies, and Set of Books
- Step 4 (Required) Set Up Organizations
- Step 5 (Required) Define Locations
- Step 6 (Optional) Define Your Employees
- Step 7 (Required) Confirm the Setup of Inventory
- Step 8 (Optional) Confirm the Setup of BOM
- Step 9 (Optional) Confirm the Setup of WIP
- Step 10 (Required) Confirm the Setup of Order Management
- Step 11 (Optional) Confirm the Setup of Advanced Pricing
- Step 12 (Required) Confirm the Setup of Service Request
- Step 13 (Required) Confirm the Setup of Charges
- Step 14 (Required) Confirm the Setup of Knowledge Base
- Step 15 (Required) Confirm the Setup of Notes
- Step 16 (Required) Confirm the Setup of Resources
- Step 17 (Required) Confirm the Setup of Installed Base
- Step 18 (Required) Confirm the Setup of Contracts Core
- Step 19 (Required) Confirm the Setup of Service Contracts
- Step 20 (Required) Set Up Depot Repair Profile Options
- Step 21 (Required) Set Up Depot Repair Types
- Step 22 (Required) Set Up Depot Repair Reason Codes
- Step 23 (Required) Set Up Depot Repair Concurrent Programs

Implementation Steps

Perform the following implementation steps in sequential order.

Step 1 (Required) Set Up System Administrator

For this step, perform the following tasks:

- Define responsibilities.
See: *Oracle Applications System Administrator's Guide*.
- Set up printers (optional).
See: *Setting Up Your Printers, Oracle Applications System Administrator's Guide*.

Step 2 (Required) Set Up Key Flexfields

If you are or will be fully installing other applications such as Oracle Human Resource Management or Oracle Inventory, then be sure to coordinate flexfield setup of those products with defining the key flexfields here. This is so because Oracle recommends not changing flexfields frequently. See: *Oracle Applications Flexfields Guide*.

For each key flexfield, perform the following tasks, some of which are optional for some flexfields:

- Define the flexfield structure.
- Define value sets.
- Define flexfield segments.
- Define flexfield segment values.
- Define security rules.
- Assign security rules.
- Define roll-up groups.
- Define cross-validation rules.

Set up the Accounting flexfield. You may not need to perform this step if you have already installed and set up Oracle General Ledger or performed a common-applications setup. See also: *Oracle General Ledger User's Guide*.

Set up the following Human Resources key flexfields. You may not need to set up these key flexfields if you have already installed and set up Oracle Human Resource Management Systems or performed a common-applications setup. See also: *Oracle Human Resources User's Guide*.

- Grade flexfield

- Job flexfield
- Position flexfield
- People Group flexfield

Step 3 (Required) Set Up Calendars, Currencies, and Set of Books

If you have defined your calendars, currencies, and set of books while setting up a different Oracle Applications product, then proceed to the next step. However, if you are performing a Multi-Org implementation, then you may optionally create more than one calendar, currency, or set of books. See: *Multiple Organizations in Oracle Applications*.

For this step, perform following tasks:

- Set up calendars:
 - Define period types.
See: *Defining Period Types, Oracle General Ledger User's Guide*.
 - Define accounting calendar.
See: *Defining Calendars, Oracle General Ledger User's Guide*.
 - Define transaction calendar.
See: *Defining Transaction Calendars, Oracle General Ledger User's Guide*. (Optional)
 - Define workday calendar.
See: *Overview of Workday Calendar, Oracle Bills of Material User's Guide*. (Optional)
- Define exception templates.
See: *Creating a Workday Exception Template, Oracle Bills of Material User's Guide*. (Optional)
- Define currencies.
See: *Defining Currencies, Oracle General Ledger User's Guide*.
- Define conversion rate types.
See: *Defining Conversion Rate Types, Oracle General Ledger User's Guide*.
- Assign your set of books to a responsibility.
See: *Oracle General Ledger User's Guide*.
- Set up currency rates.
- Set up accounting code combinations.

See: *Oracle General Ledger User's Guide*.

- Open and close accounting periods.

See: *Opening and Closing Accounting Periods, Oracle General Ledger User's Guide*.

Step 4 (Required) Set Up Organizations

You may not need to perform this step if you have already installed and set up Oracle Inventory or performed a common-applications setup.

For the following tasks relating to setting up organizations, see: *Oracle Human Resources User's Guide*.

- Define organization QuickCodes.
- Define business groups if you want to define new business groups rather than using the default Setup Business Group.

See the section *View—all Responsibility in: Setting Up Security for Applications Using Some HRMS Windows, Oracle Human Resources User's Guide*.

- Define organizations.
- Define human resources organizations.
- Define legal entities organizations.
- Define Oracle users for operating-unit organizations.
- Assign operating units to legal entities.
- Set up inventory organizations.

For the tasks relating to setting up inventory organizations, see: *Oracle Inventory User's Guide*.

- Define organization hierarchies.
See: *Oracle Human Resources User's Guide*.
- Assign business groups and operating units to responsibilities.

Make sure that the profile option HR: Business Group is set at the responsibility level to the business group that you want to use for that responsibility. See: *Oracle Human Resources User's Guide*.

Step 5 (Required) Define Locations

If you are also setting up other Oracle applications, you may already have defined locations when you set up those applications.

In Oracle Purchasing, define locations for where you ship, deliver internally, or bill the goods and services that you order. This is a necessary setup if you plan on importing purchase requisitions from the Planner Workbench into Oracle Purchasing. See: Setting Up Locations, *Oracle Human Resources User's Guide*.

Step 6 (Optional) Define Your Employees

If you do not install Oracle Human Resource Management Systems with Depot Repair, then use the Enter Employee form to define and maintain employees in Oracle Purchasing. Otherwise, the forms in Oracle Human Resource Management Systems are used to enter and maintain employees.

Step 7 (Required) Confirm the Setup of Inventory

Make sure that you set up Inventory as described in Overview of Setting Up in *Oracle Inventory User's Guide*. Ensure that all the following steps have been reviewed and completed as necessary:

- Item flexfield
- Category flexfield
- Catalog Group flexfield
- Stock Locators flexfield
- Account Aliases flexfield
- Sales Orders flexfield
- Change organizations
- Intercompany relations
- Receiving Options
- Picking rules
- ATP
- Planners
- Unit of Measure classes
- Unit of Measure
- Unit of Measure conversion
- Subinventories
- Stock locators
- Item attribute controls
- Categories

- Category set
- Default Category set
- Statuses
- Item Catalog Groups
- Item Types
- Item Templates
- Items
- Cross-reference Types
- Item Delete Constraints
- Cost Types
- Cost Activities
- Material sub-elements
- Material overheads
- Material overhead rates
- Freight Carriers
- Organization Shipping Network
- Shipping Methods
- Movement Statistics parameters
- Economic zones
- Account Aliases
- Transaction source types
- Transaction types
- Transaction reasons
- Purchasing Options
- Accounting periods
- Interface managers
- Profile Options
- Container Types
- Commodity Codes
- Customer Items

- Customer item cross references
- Notification List
- Shortage parameters

Step 8 (Optional) Confirm the Setup of BOM

Make sure that you set up Bills of Material as described in Overview of Setting Up, *Oracle Bills of Material User's Guide*. Ensure that all the following steps have been reviewed and completed as necessary:

- Profile Options
- Exception Tables
- Workday Calendar
- Workday Calendar for Organization
- Define parameters
- Resources
- Resource Groups
- Simulation Sets
- Locations
- Departments
- Resource and Resource Shifts to Departments
- Overheads
- Overheads with Departments
- Alternates
- Standard BOM comments
- Standard instructions
- Change Order Types
- Delete Constraints

When reviewing the BOM setup for Depot Repair, remember to review with the client whether the manufacturing BOM should be primary. Then the client can create alternate BOMs to support the repair and upgrade activities of the depot.

Step 9 (Optional) Confirm the Setup of WIP

Make sure that you set up Work in Process as described in Overview of Setting Up, *Oracle Work in Process User's Guide*. Ensure that all the following steps have been reviewed and completed as necessary:

- Profile Options
- WIP parameters
- WIP accounting class
- Schedule Groups
- Labor Rates
- Job and Schedule Documents
- Operation Documents

When reviewing the WIP setup for Depot Repair, remember that repair jobs use the non-standard WIP functionality. Also, confirm with the accounting team to ensure that the appropriate GL accounts have been created to record activity for Rework/Repair or however the client desires to capture the accounting information.

Step 10 (Required) Confirm the Setup of Order Management

Make sure that you set up Order Management as described in Overview of Setting Up, *Oracle Order Management User's Guide*. Ensure that all the following steps have been reviewed and completed as necessary:

- Profile Options
- parameters
- Invoicing
- Sales persons
- Tax
- Quick Codes
- Workflow
- Document Sequences
- Order Import Sources
- Customer Classes
- Customers
- Transaction Types
- Cost of Goods Sold

- Processing Constraints
- Defaulting Rules
- Credit Checking
- Holds
- Attachments
- Freight Charges and Carriers
- Pricing
- Shipping

When reviewing the Order Management setup for Depot Repair, contact the Oracle Depot Repair product management team for more information on how to create various Depot Repair transaction types to support the creation and processing of sales orders and RMAs in Depot Repair.

Step 11 (Optional) Confirm the Setup of Advanced Pricing

Make sure that you set up Advanced Pricing as described in Overview of Setting Up, *Oracle Advanced Pricing User's Guide*. Ensure that all the following steps have been reviewed and completed as necessary:

- Profile Options
- Qualifiers
- Pricing Attributes
- Attribute Sourcing
- Pricing Lookup
- OM Lookup
- Shipping Lookup
- Order Types
- Line Types
- Freight Terms
- Freight Cost Types
- Payment Terms
- System Sourcing
- Event Phasing

When reviewing the Advanced Pricing setup, review with the client to determine the need to create a Depot Price List.

Step 12 (Required) Confirm the Setup of Service Request

Make sure that you set up Service Request as described in the Implementing section of Oracle Service Request online help documentation.

Step 13 (Required) Confirm the Setup of Charges

Make sure that you set up Charges as described in the Implementing section of Oracle Charges or Oracle Service online help documentation.

Step 14 (Required) Confirm the Setup of Knowledge Base

Make sure that you set up Knowledge Base as described in the Implementing section of Oracle Knowledge Base or the Oracle Service help documentation.

Step 15 (Required) Confirm the Setup of Notes

Make sure that you set up Notes as described in the Implementing section of Oracle Notes online help documentation.

Step 16 (Required) Confirm the Setup of Resources

Make sure that you set up Resources as described in the Implementing section of Oracle Resources online help documentation.

Step 17 (Required) Confirm the Setup of Installed Base

Make sure that you set up Installed Base as described in the Implementing section of Oracle Installed Base or Oracle Service online help documentation.

Step 18 (Required) Confirm the Setup of Contracts Core

Make sure that you set up Contracts Core as described in the Implementing section of Oracle Contracts Core online help documentation.

Step 19 (Required) Confirm the Setup of Service Contracts

Make sure that you set up Service Contracts as described in the Implementing section of Oracle Service Contracts online help documentation.

Step 20 (Required) Set Up Depot Repair Profile Options

This section describes the specific Depot Repair profiles and related CRM Service profiles necessary to run Oracle Depot Repair transactions.

Query Relevant Profiles

1. Navigate to **System Administration**—>**Profile**—>**System**.
2. Keep window default settings for the Display area.
3. Enter a profile such as %Depot Repair% or %Service%.
4. Click **Find**.
5. Set profile options according to the tables in this section.

Depot Repair Profile Options

Depot Repair Profile Option Name	Possible Values	User	Resp	App	Site	Functionality
Depot Repair: Customer Approval Required	Yes/No/Null				X	If set to Yes, then the Approval Required checkbox is defaulted to yes/checked in the Repair Order window.
Depot Repair: Released Quantity equal to Remaining Quantity	Yes/No/Null	X	X		X	If set to Yes, then the Repair Jobs window defaults the Release Quantity to the Remaining Quantity for each Repair Order in the list.
Depot Repair: Use Oracle WIP for Depot Repair	Yes/No/Null				X	If set to Yes, then the Repair Order window enables its Repair Jobs tab.

Depot Repair Profile Options

Depot Repair Profile Option Name	Possible Values	User	Resp	App	Site	Functionality
ASO: Product Organization	Any Active Inventory Organization	X	X	X	X	Used by the Repair Order window, Charges window, and Service Request to edit the Item Numbers entered against the Item Master table.

Oracle Service Profile Options that Affect Oracle Depot Repair

Profile Option Name	Possible Values	User	Resp	App	Site	Functionality
Service: Default Expense Item	Any Item in the Item Master (MTL_SYSTEM_ITEMS) with Material_Billable_Flag = "E"	X	X	X	X	The Charges window rolls up all of the Charge Line with an Expense Item Number (Item Master Attribute) and the Roll-up checkbox checked and passes the total along with this Item # to OC/OM (creates 1 Order/Invoice Line instead of several).

Profile Option Name	Possible Values	User	Resp	App	Site	Functionality
Service: Default Material Item	Any Item in the Item Master (MTL_SYSTEM_ITEMS) with Material_Billable_Flag = "M" or null	X	X	X	X	The Charges window rolls up all of the Charge Line with an Material Item Number (Item Master Attribute) and the Roll-up checkbox checked and passes the total along with this Item Number to OC/OM (creates 1 Order/Invoice Line instead of several).
Service: Default Labor Item	Any Item in the Item Master (MTL_SYSTEM_ITEMS) with Material_Billable_Flag = "L"	X	X	X	X	The Charges window rolls up all of the Charge Line with an Labor Item Number (Item Master Attribute) and the Roll-up checkbox checked and passes the total along with this Item # OC/OM (creates 1 Order/Invoice Line instead of several).

Profile Option Name	Possible Values	User	Resp	App	Site	Functionality
Service: Product Status when Returned for Repair	Any status code in CS_CUSTOMER_PRODUCT_STATUSES	X	X	X	X	Used to update the status of Installed Base Items returned for repair when the OM Return Line does not have Installation Details with a Transaction Type Code that has an Installed Product Status Code on it.
Service: Product Status for Returns	Any status code in CS_CUSTOMER_PRODUCT_STATUSES	X	X	X	X	Used to update the status of Installed Base Items returned for credit when the OM Return Line does not have Installation Details with a Transaction Type Code that has an Installed Product Status Code on it.

Step 21 (Required) Set Up Depot Repair Types

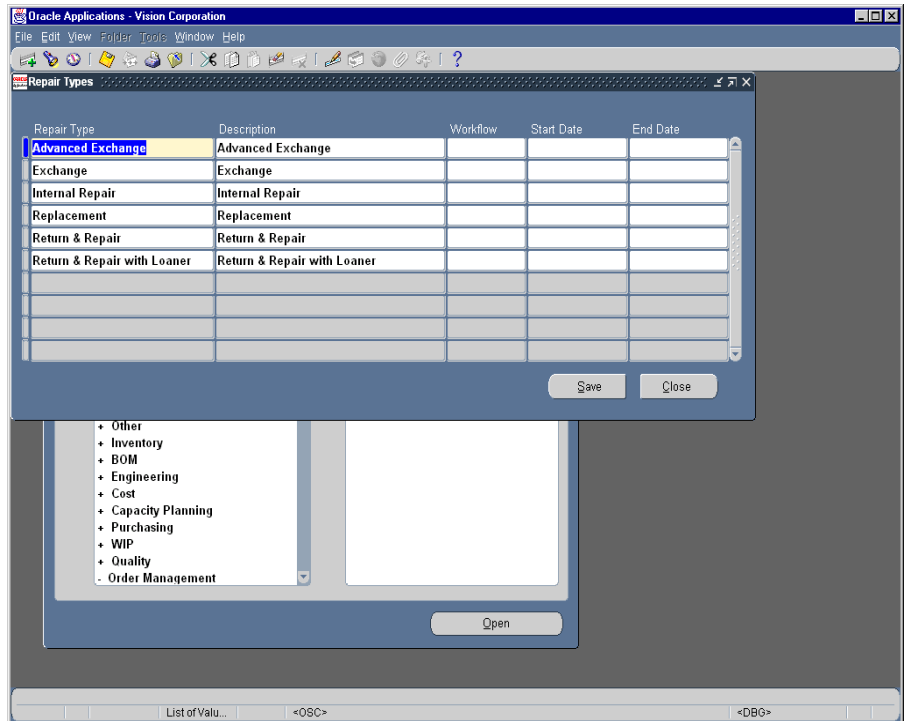
This section describes how to create specific Depot Repair types.

- 1. Navigate to Depot Repair—>Setup—>Repair Types.**
- 2. Define the necessary repair types.**

Typically, seeded repair types include the following:

- Return/Repair
- Return/Repair with Loaner
- Advanced Exchange
- Exchange

- Replacement
- Internal Repair



Columns

- Repair Type - Repair Type code
- Description - Description of Repair Type code
- Workflow - Workflow associated with the Repair Type
- Start Date - First date that the Repair Type was available and valid
- End Date - Last date the Repair Type was available and valid

Buttons

- Save - Save a new Repair Type
- Close - Closes the Repair Type window

Step 22 (Required) Set Up Depot Repair Reason Codes

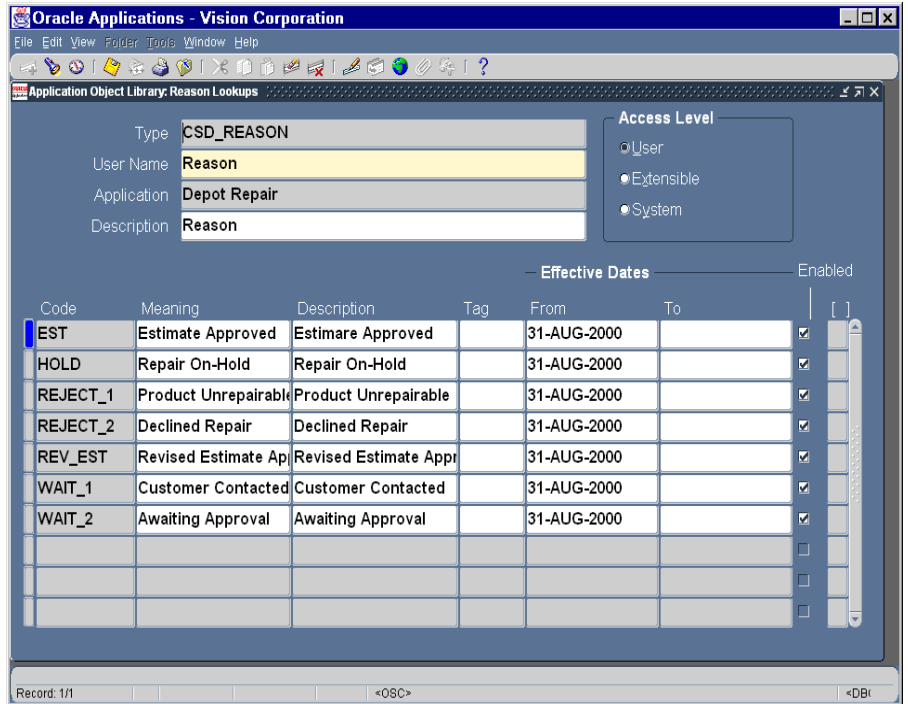
This section describes how to create specific Depot Repair Types.

1. Navigate to **Depot Repair**—>**Setup**—>**Reason**.

2. Define the necessary repair types.

Reason codes concern the repair and customer approval. Typically, seeded reason codes include the following:

- Customer Approved Estimate
- Customer Approved Revised Estimate
- Awaiting Customer Approval on Revised Estimate
- Customer Contacted
- Customer Refused Estimate/Repair



Columns

- Type - Seeded value not user definable
- User Name - User definable value for this type
- Application - Owner of Reason Type
- Description - Description of Reason Type
- Code - Unique Code
- Meaning - Meaning for the Code

- Description - Description of the Code
- Tag - Optional additional category hard code. Not used by Depot Repair
- Effective Date From - First date that the Reason code was available and valid
- Effective Date To - Last date the Reason code was available and valid
- Enable - Enables the use of the Reason Code

Step 23 (Required) Set Up Depot Repair Concurrent Programs

Oracle Depot Repair provides you with the following concurrent programs:

- Depot Repair WIP Update
- Depot Repair Receiving Update
- Depot Repair Shipping Update

You can set processing control globally for all transactions or you can choose different options for each type of transaction.

Depot Repair WIP Update

The Depot Repair WIP Update concurrent program is used to update repair orders and create repair history records when WIP jobs related to Depot Repair are submitted and completed.

Overview WIP Jobs for repair lines are created using the Submit Repair Jobs window. A given repair line can be represented by multiple repair jobs in WIP or multiple repair lines can be batched as a single job. The program updates the repair line with the quantity processed and creates a repair job history record for each updated line.

Program Logic The Depot Repair WIP update program is called by either the Submit Request Window or the AOL Submit Request API. The program is not intended to be called directly from the command line or run outside the Oracle Applications environment. The program logic is follows:

1. Find all repair lines with pending WIP jobs that are partially or fully completed.
2. Update the repair line by the completed quantity in WIP.
3. Create a history record that contains the completed quantity and associated job number for each repair line updated.
4. If insufficient inventory exists to complete all repair lines for a given product, then the promise dates for the lines are used as the basis for

choosing which lines to update. A repair line that has earlier promise date takes precedence over repair lines that have a later promise date.

5. If insufficient inventory exists to complete all repair lines for a given product and the promise dates for the lines are the same, then fully complete as many lines as possible. After fully completing one or more lines, use any remaining quantity to partially completing a single line. Lines are processed in sequential order.
6. If insufficient inventory exists to fully complete even one repair line for a given product, then partially complete one line.

Dependencies The Depot Repair WIP Update concurrent program is dependent on the following application modules:

- Oracle Depot Repair Release 11i
- Oracle WIP Release 11i

Depot Repair Receiving Update

The Depot Repair Receiving Update concurrent program is used to update repair orders and create repair history records when returns are received.

Overview Return Material Authorizations (RMA) to receive repair items are created through the charges window. RMAs are pushed into Order Management for standard processing and subsequently into Inventory/Receiving for inspection and receiving. When an RMA related to a repair line is received, the program updates the total quantity received for the repair line and creates a repair history record.

Program Logic The Depot Repair Receiving update program is called by either the Submit Request window or the AOL Submit Request API. The program is not intended to be called directly from the command line or run outside the Oracle Applications environment. The program logic is follows:

1. Find all repair lines that have both RMAs and pending receipts.
2. Create a history record that contains the received quantity and associated receipt data for each record to be updated.
3. Update the repair line by the received quantity associated with the RMA.

Dependencies The Depot Repair Receiving Update concurrent program is dependent on the following application modules:

- Oracle Depot Repair Release 11i
- Oracle Order Management Release 11i

- Oracle Inventory Release 11i

Depot Repair Shipping Update

The Depot Repair Shipping Update concurrent program is used to update repair orders and create repair history records when repaired goods are shipped and a related sales order is generated.

Overview Sales orders for repair line shipments are created through the Charges window. The sales orders are submitted to Order Management and processed and shipped by the Shipping module. The associated repair lines in Depot Repair need to be updated with the shipped quantity. A history record must be created to record the shipped quantity and shipped date against the repair line.

Program Logic The Depot Repair Shipping Update program is called by either the Submit Request window or the AOL Submit Request API. The program is not intended to be called directly from the command line or run outside the Oracle Applications environment. The program logic is follows:

1. Find all repair lines associated with repair-related sales orders where the order has been shipped.
2. Update the repair line by the shipped quantity.
3. Create a history record that contains the shipped quantity and associated shipping data.

Dependencies The Depot Repair Shipping Update concurrent program is dependent on the following application modules:

- Oracle Depot Repair Release 11i
- Oracle Order Management Release 11i
- Oracle Shipping Release 11i

