Oracle® Spares Management

Concepts and Procedures

Release 11*i*

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Oracle Spares Management Concepts and Procedures, Release 11*i*.

Part No. A95414-02

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Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Spares Management Concepts and Procedures.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Spares Management

  If you have never used Spares Management, Oracle suggests you attend one or more of the Spares Management training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Spares Management.

- Chapter 1, Understanding Oracle Spares Management explains what Spares Management is, describes its logistics and planning features, and shows how Spares Management integrates with Field Service and other Oracle applications.
- Chapter 2, Using Oracle Spares Management Logistics, describes the procedures necessary for using Spares Management, including replenishing

field engineer and warehouse inventories, ordering parts, and managing excess returns.

- Chapter 3, Using Loop and Location Planning, contains the procedures used in planning loop notifications and location planning.
- Chapter 4, Administering Oracle Spares Management, describes how to administer all the functions contained in Oracle Spares Management.

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Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

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You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Spares Management.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Spares Management shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Spares Management.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Spares Management (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Installation and System Administration

Oracle Order Management User's Guide

This document tells you how to set up order management, including orders, pricing, processes, and standard reports.

Oracle Shipping Execution User's Guide

This guide contains the information you need to understand and use Oracle Shipping Execution. It includes descriptions of how to set up shipping parameters, perform shipping transactions, create trips and assign freight costs, create and manage pack deliveries, and calculate shipping costs.

Oracle Purchasing User's Guide

This guide tells you how to set up and use purchase orders, use requisitions, use supply base management, control goods received, make inquiries, and set up reports and processes.

Other Implementation Documentation

Oracle Spares Management Implementation Guide

This manual contains up-to-date information about integrating with other Oracle Field Service applications and with your other systems.

Oracle Inventory User's Guide

This guide describes how to set up Oracle Inventory, and shows how Inventory represents your company's inventory sites and business units. It includes how to manage inventory items, controls and options, and inventory levels.

Oracle Field Service Concepts and Procedures

This document describes the functionality of the entire Field Service suite including Control Tower and Field Service Report. Field Service supports the entire service process from taking the customer's call to repairing and reporting the problem at a customer site.

Oracle Field Service Implementation Guide

This guide describes how to set up and use the Field Service suite. Field Service supports the entire service process from taking the customer's call to repairing and reporting the problem at a customer site.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

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Training

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Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Spares Management working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

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Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

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Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

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1

Understanding Oracle Spares Management

This chapter provides an overview of Oracle Spares Management and its components, explanations of key concepts, features, and business flows, as well as the application's relationships to other Oracle applications.

Topics covered are:

- Spares Management Overview
- Logistics Features
- Planning Features
- Logistics Business Flows
- Planning Business Flows
- Integration and Dependencies of Spares Management

1.1 Spares Management Overview

Spares Management is designed to manage the spare parts inventory of a field service organization. The product covers essential functionality in both logistics and planning activities. Spares Management uses core foundation functionality from Oracle Inventory and adds the special features and functionality required for spares management in a field service organization.

1.1.1 Logistics

Spares Management logistics supports the spares replenishment process for both subinventory replenishment and field engineering orders. Replenishment for warehouse and field engineer subinventories can be either automated or manual depending on user requirements. If a field engineer needs a part for a specific service request and task, the part order is linked to the task and can be shipped to wherever the field engineer needs the part.

Spares Management logistics also provides the ability to minimize inventory excesses by managing the return of excess parts. Business rules can be defined that focus on the excess parts with the highest cost impact.

1.1.2 Planning

Oracle Spares Management supports planning at both the aggregate and location level. Aggregate or multi-location planning in Spares Management is called Parts Loop Planning.

At the aggregate level, individual subinventories are organized into parts loops for control of the total inventory within the loop. The parts loop becomes the primary planning entity which is used to coordinate planning and execution activities across multiple locations. A Master Stock List (MSL) is set up to define the stocking plan for the planning loop. Notifications to the planners are generated when the inventory levels are greater than or less than those defined in the MSL.

Planning at the location level is primarily determined by parts cost and usage activity. Spares Management can automatically generate a recommended Authorized Stock List (ASL) to define the stocking plan for each warehouse or engineer. The ASL defines the parts and quantities required at each location.

1.1.3 Integration with Field Service

Spares Management is closely integrated with the Oracle Field Service suite of products. Field engineers and dispatchers can order parts and view the status of parts orders from Field Service windows. The integration with Scheduler considers parts availability when automatically scheduling tasks.

1.1.4 Integration with Other Oracle Applications

Oracle Inventory provides the essential functionality and structure for Spares Management parts, subinventories and inventory organizations. Spares Management parts orders that cross inventory organizations use the functionality provided by Oracle Order Management internal orders and Oracle Purchasing internal requisitions.

The following sections provide additional detail in the following areas:

- Logistics Features

- Planning Features
- Logistics Business Flows
- Planning Business Flows
- Integration and Dependencies of Spares Management

1.2 Logistics Features

Spares Management logistics supports warehouse and field engineer replenishment and the processing of the field engineer's task related orders. Management of excess parts is also provided in the product.

Key logistics features include:

- Visibility of inventory across multiple locations
- Ability to track both usable and defective parts using subinventory controls
- Order processing for both automated replenishment and service task orders
- Drop shipment to special ship to addresses
- Ability to track parts in transit between subinventories
- Ability to track parts throughout the entire logistics process including defective returns
- Ability to define and return excess parts

1.2.1 Visibility of inventory across multiple locations

You can define reporting hierarchies across multiple geographic locations, using logical nodes for your warehouses and subinventories. A reporting hierarchy can include more than one organization. When you search for a part, you can use point and click functionality to drill down to the location with the part.

1.2.2 Ability to track usable and defective parts using subinventory controls

Each subinventory is defined for either usable or defective inventory. When a recovered part is reported by the field engineer in the Field Service Report, the defective part is automatically moved into the field engineer's designated defective subinventory. When parts usage is reported, the transaction to reduce the designated usable subinventory is automatically created and processed.

1.2.3 Order processing for both automated replenishment and service task move orders

Automated replenishment is accomplished using Min-Max planning to automatically create move orders. Orders for parts required by the field engineer for a service task can also be created manually.

1.2.4 Drop shipment to special ship to addresses

When a move order or parts order is created, a special ship to address can be entered. The special ship to address can be assigned to the field engineer for future shipments.

1.2.5 Ability to track parts that are in transit between subinventories

Parts in transit from one subinventory to another are tracked as part of the total view of inventory. The in-transit transaction is created when the shipment is confirmed.

1.2.6 Ability to track parts throughout the entire logistics process

You can view the detailed status of Move Orders and Parts Orders at any time during the processing of the order. Related documents are included in the view of the order status, such as pick lists and packing lists.

1.2.7 Ability to define and return excess parts

You can track excess parts and decide how excess parts will be returned to a warehouse or designated drop off location. You can also define business rules to enable the field engineer or dispatcher to focus on the few excess items that have the highest impact.

1.3 Planning Features

Spares Management supports planning at the location level and the loop level. The Planner’s Desktop provides an easy to use point and click user interface for organizing planning and forecasting.

Key planning features include:

- Ability to define multiple loops
- Use of a Master Stock List

- Automated planner notifications
- Use of an Authorized Stock List
- Automated Authorized Stock List recommendations
- Designation of a replenishment location
- Planner's Desktop
- Ability to forecast parts requirements based on historical usage

1.3.1 Ability to define multiple loops

Spares Management has the flexibility to configure multiple, non-overlapping parts loops within a single service organization. The number of unique loops can be tailored to meet the specific needs of the organization. The loops can include subinventories from more than one organization.

1.3.2 Use of a Master Stock List

Spares Management uses a Master Stock List (MSL) to define the stocking plan for the planning loop. The MSL defines the parts and total quantities to be stocked in the loop. The MSL also provides for a minimum usable quantity to ensure that the loop maintains a reasonable balance of usable parts.

1.3.3 Automated planner notifications

Notifications are generated automatically when the total available quantity is above or below plan as defined in the MSL. Notifications are also generated when the level of usable parts has dropped below the minimum on-hand level as designated in the MSL.

1.3.4 Use of an Authorized Stock List

Spares Management uses an Authorized Stock List (ASL) to define the stocking plan for each location. Using the min-max approach, the ASL defines the parts and quantities required for stocking at each location, including the field engineer's truck stock.

1.3.5 Automated Authorized Stock List recommendations

Spares Management provides a program to calculate recommendations for the ASL. After the recommendation is calculated, planners can review, make changes and approve the recommendations.

1.3.6 Designation of replenishment location

In the ASL, a replenishment location is designated for each part. While most items are typically replenished from the same location, this feature provides for the exceptions that are often needed. Strategies that call for replenishment directly from suppliers would use this planning method.

1.3.7 Planner's Desktop

The Planner's Desktop provides for an organized presentation of the functionality used for planning and execution at the location and loop levels. Included on the desktop are parts loops, reporting hierarchies, notifications and the ASL planning tools.

1.3.8 Ability to forecast parts requirements based on historical usage

Forecasting information can be produced using four different methods, all of which are based on historical parts usage. The usage and forecast information can be viewed in a graphical format.

1.4 Logistics Business Flows

Spares Management logistics covers the movement of parts to replenish field engineer and warehouse inventories as well as the return of excess parts.

There are several scenarios that could occur in a logistics environment. Typical scenarios are depicted in the key business flows that follow.

- Field engineer and warehouse replenishment
- Ordering parts for field engineer tasks
  - Ordering parts using Internal Orders
  - Ordering parts using Move Orders
- Managing excess usable parts
- Managing excess defective parts

1.4.1 Field Engineer and Warehouse Replenishment

Automated replenishment for parts inventories at any location is accomplished by using Oracle Inventory Min - Max Planning. Move orders, internal orders and purchase requisitions can be generated automatically or a report can be generated and the recommendations can be reviewed by the planner.

A summarized business flow for this process follows.

1. Run the Oracle Inventory Min - Max Planning concurrent program.
2. If the program is run with the Restock parameter set to Yes, move orders are automatically created depending on the source.

   If the program is run with the Restock parameter set to No, then the planning report is reviewed by a planner and no orders or requisitions are automatically created.
3. For internal orders, the pick, pack, and ship activities are completed using standard processing for an internal order in Oracle Order Management and Oracle Inventory. For move orders, the pick, pack and ship activities are completed in Spares Management.
4. The shipments are received manually or automatically.
5. The status of the internal orders or move orders can be viewed throughout the entire process.

1.4.2 Ordering Parts for Field Engineer Tasks

There are two methods of ordering parts for field engineer tasks. You can order parts by using the Parts Requirements window, which results in the creation of an internal order in Oracle Order Management. This method allows you to move parts across inventory organizations and provides additional warehouse management functionality. You can also order parts within a single inventory organization by creating a move order in Spares Management.

A summarized key business flow for each ordering process follows:

- Ordering parts using Internal Orders
- Ordering parts using Move Orders

1.4.2.1 Ordering Parts Using Internal Orders

Internal orders are created in the Parts Requirement window. When integrating with the Scheduler module, the window can also be used to create a parts requirement for a task without creating the internal order. The internal order is used primarily in the spares management process for moving parts between organizations.

A summarized business flow for this process follows. This flow does not include the scheduler integration.

1. A service request task is assigned to a field engineer. The field engineer determines that additional parts are needed that are not currently on hand.
2. The field engineer notifies the dispatcher of the parts required. The dispatcher debriefs, closes the existing task and records any parts, labor or expenses that were consumed so far.
3. The dispatcher creates a new task associated with the same service request and creates an internal order for the specific parts required for the task.
4. Using the Available to Promise (ATP) integration feature in the Parts Requirement window, the dispatcher can determine when the parts will be available and can schedule the second task appropriately.
5. The pick, pack, and ship activities are completed using standard processing for an internal order in Oracle Order Management and Oracle Inventory.
6. The field engineer receives the parts, completes the task and the service request is closed.
7. The status of the internal order can be viewed by the dispatcher from the View Parts Order Status window in Spares Management throughout the process.

1.4.2.2 Ordering Parts Using Move Orders

A move order can be created manually by a field engineer or dispatcher when a part needs to be transferred among subinventories within a single inventory organization. This functionality would be used primarily to transfer parts between field engineers in the same inventory organization.

A summarized business flow for this process follows.

1. A service request task is assigned to a field engineer. The field engineer determines that additional parts are needed that are not currently on hand.
2. The dispatcher uses the Parts Search Hierarchy to locate the parts.
3. The dispatcher debriefs and closes the current task and creates a new task linked to the same service request. The dispatcher also creates a move order for the requested parts. The parts can either be shipped to the field engineer’s subinventory or drop shipped to a customer address.

4. The move order is processed using standard pick, pack and ship functionality in Spares Management.
5. The dispatcher monitors the status of the order in Spares Management using the View Move Order Status window.
6. When the parts are received, the new task can be assigned and scheduled.

1.4.3 Managing Excess Usable Parts

The process for returning excess usable parts starts with the running of the Create Excess List concurrent program and is completed when the excess is received at the designated warehouse or drop-off location.

The business flow for this process as it applies to a field engineer follows.

1. The field engineer or dispatcher runs the Create Excess List concurrent program to identify items where the inventory balance is greater than the maximum level.
2. The Create Excess List program applies your predefined business rules to filter for higher impact excess parts.
3. The field engineer receives the list of excess parts via a hardcopy report or views the excess directly in the Excess Returns window.
4. The field engineer confirms the items and quantities to be returned.
5. The field engineer communicates with the dispatcher or planner to confirm the shipment or delivery of excess parts with the carrier and waybill information. For a Field Engineer organization type, an inter-organization transfer order is automatically created as defined in the Planning tab of the Planner’s Desktop. For a Warehouse organization type, an internal order is created.
6. The warehouse receives the shipment if the parts were shipped.

1.4.4 Managing Excess Defective Parts

Returning excess defective parts uses a process which is similar to returning usable excess parts. The only difference is in the definition of excess and the application of business rules. Since defective subinventories do not have min-max levels, all inventory is considered excess. Excess business rules do not apply to defective excess parts.

1.5 Planning Business Flows

Spares parts planning can be accomplished in Spares Management at the location level or at the aggregate level, which is referred to as loop planning.

A summarized business flow for planning at each level follows.

1.5.1 Location Level Planning

Planning at the subinventory location level is accomplished by running a program to calculate recommended min-max levels and then approving, updating or rejecting the recommendations. An Authorized Stock List is maintained for each subinventory and stores the min-max level for each part.

A summarized business flow for this process follows.

1. Run the Create ASL Recommendation concurrent program.
2. Review and process the ASL recommendations.

1.5.2 Loop Planning

Planning at the parts loop level involves the comparison of available parts to the Master Stock List. When the available quantities of parts do not meet the inventory levels defined for the parts loop, a notification is created for review and processing by the planner.

The steps for defining a parts loop are described in detail in the *Oracle Spares Management Implementation Guide* and are summarized below:

1. Create the Parts Loop
   - Select a calculation rule for the parts loop to determine how the Actual Available quantity is calculated for the loop
   - Select a forecast rule for the parts loop to define how the forecast is created for the loop
2. Assign subinventory locations to the Parts Loop
3. Create the Master Stock List for the Parts Loop
   - Define the parts to be stocked in the loop and the total quantity to be stocked for each part.
   - Define the minimum usable quantity for each part
4. Graphical forecasts are available for viewing usage activity.

A summarized business flow for the planning process at the loop level follows.

1. Run the Create Part Availability Data concurrent program.
2. Run the Create Usage History concurrent program.
3. View the usage and forecast information.
4. Run the Create Notifications concurrent program.
5. View the notifications.
6. Take the appropriate action to respond to the notifications.
7. Update the status of the notifications.

1.6 Integration and Dependencies of Spares Management

As part of the Oracle Service suite of products, Spares Management is classified as an installable module provided with the Field Service solution. Oracle Inventory and Oracle Order Management are the only prerequisite products specifically required for a Spares Management implementation.

Integration with Oracle Field Service provides the key operational functionality associated with creating and viewing the move orders, viewing inventories and processing parts transactions from the field service engineer. Integration with Oracle Order Management provides the ability to move parts among multiple inventory organizations and includes several sophisticated warehouse management features.

Integration features are discussed for the following Oracle Applications:

- Oracle Field Service
- Oracle Scheduler
- Oracle Inventory
- Oracle Order Management
- Oracle Purchasing

1.6.1 Oracle Field Service

Spares Management is closely integrated with the Oracle Field Service group of products. Orders for parts, status of orders and location of parts inventories are issues of special interest to the field service organization.

Key integration features with Field Service include:

- Detailed view of Move Order status from Field Service
- Ability to create Move Orders from the Field Service Report
- Parts reporting parts usage and recovery transactions
- Hierarchal view of inventory balances

1.6.2 Oracle Inventory

Oracle Inventory provides the essential foundation functionality for the Item Master or part number, inventory organizations, subinventories, parts inventory balance tracking, cycle counting and so forth. Spares Management uses inventory organizations as a structure for subinventories which contain spare parts. Spares Management uses subinventories for tracking usable and defective spare parts.

Key integration features with Oracle Inventory include:

- Ability to track serial numbers, lots, revisions, and locators
- Usage of the inventory organization and subinventory structure
- Min-Max Planning for automated replenishment

1.6.3 Oracle Order Management

Oracle Order Management provides the functionality for the processing of an internal order to deliver parts to a field engineer for a specific task. An internal order is initiated in Spares Management in the Parts Requirement window. Within Order Management, the internal order is processed almost exactly like an order that is to be shipped to an external customer. This processing includes the picking, packing, shipping and receiving of the order.

Key integration features with Oracle Order Management include:

- Ability to create Internal Orders to transfer parts across inventory organizations
- Ability to use mobile applications in the warehouse
- Ability to use barcode and scanning functionality
- Ability to use pick, pack and ship functionality

1.6.4 Oracle Scheduler

The scheduling and management of field service tasks needs to consider the location and availability of parts along with other resource related criteria. The dispatch and arrival of both the field service engineer and the parts must be closely monitored and managed in the fast cycle service environment. The integration of Spares Management with Scheduler incorporates parts availability into the task assignment and scheduling process.

Key integration features with Oracle Scheduler include:

- Ability to consider the location and availability of parts when scheduling field service tasks
- Ability to define relationships between products and tasks
  - Tracking of actual number of times a task is completed for a product
  - Tracking of actual number of time a parts is used for a product - tasks relationship
- Ability to allow a customer or a field engineer to define parts for a specific task
- Utilization of sourcing and available-to-promise (ATP) rules

1.6.5 Oracle Purchasing

When a parts order is created in the Spares Management Parts Requirement window, a purchase requisition is created in Oracle Purchasing and an internal order is created in Oracle Order Management. In Oracle Purchasing, the autocreate process is used to create a purchase order from the items ordered on the purchase requisition. When the parts are received, they are received against the purchase order.

2

Using Oracle Spares Management Logistics

This chapter provides process-oriented, task-based procedures for using Oracle Spares Management to perform business tasks that are essential for logistics functionality. Setup tasks must be performed using the Field Service Dispatch or Field Service Manager responsibility. The tasks that can be preformed when logged in as a Field Service Representative are more limited.

Processes covered are:

- Replenishing Field Engineer and Warehouse Inventories
- Ordering Parts Using Internal Orders
- Ordering Parts Using Move Orders
- Using the Parts Search Hierarchy to Find a Part
- Managing Excess Returns

2.1 Replenishing Field Engineer and Warehouse Inventories

Automated replenishment for field engineer and warehouse subinventories is accomplished by running the Oracle Inventory Min - Max Planning concurrent program. The program can be run in two modes, depending on whether you want move orders to be created automatically or if you prefer to review a report to assist you in the manual creation of move orders.

The procedure for running the Min - Max Planning concurrent program follows.

Prerequisites

- Authorized Stock Lists must be defined.

- Review the Field Engineer and Warehouse Replenishment topic in the Understanding Oracle Spares Management chapter if you need additional information.

Steps

1. Select an Inventory responsibility to run the Min - Max Planning concurrent program.

   Inventory Responsibility (N) > Planning > Min - Max Planning

2. The Parameters window opens.
3. Select Subinventory in the Planning Level parameter.
4. Enter or select the subinventory name in the Subinventory parameter.
5. Select Yes in the Restock parameter if you want to run in the automated mode that creates move orders. Select No if you want to run in manual mode.
6. Click **OK** in the Parameters window, click **Submit** in the Min-Max Planning window, and then click **No** in the Decision window.
7. To check the status of your concurrent request, select View from the Tools menu and then select Requests.
8. Click **Find** to view all of your concurrent requests.
9. To view the output of the Min - Max Planning report, select this request and then click **View Output**.

2.2 Ordering Parts Using Internal Orders

There are two methods for ordering parts for field engineer tasks. You can order parts by using the Parts Requirement window, which results in the creation of an internal requisition in Oracle Purchasing and an internal order in Order Management. You can also order parts by creating a move order in Spares Management.

Your business needs will guide your decision as to which method to use. If you order parts that will ship between inventory organizations, you want to use the first method, which creates internal orders. If you order parts that move within a single inventory organization, you can use either method.

The following procedures for ordering parts using Internal Orders are described:

- Defining Task Parts

- Creating Internal Orders
- Creating the Parts Requirement
- Selecting a Parts Order Ship to Address
- Finding Parts Availability
- Shipping Parts
- Receiving Shipments
- Viewing the Status of Internal Orders

2.3 Defining Task Parts

The Field Service Dispatcher or Manager can define a list of parts that are typically required for a specific task. This task parts definition is an efficient method for initiating an internal order to fill a parts need for a specific task. Using task parts definitions saves time because there is no need to manually determine which parts are needed for a task. When a task parts definition is used, the predefined list of parts can be modified if required.

Tasks Parts are defined for combinations of products and task templates in the Define Task Parts window. Parts can be defined automatically by running the Create Task Parts History concurrent program, which collects usage information from the debrief process in Field Service, or you can manually define parts in this window.

The Manual region of the window allows for the manual entry of items associated with the product and task template.

The Rollup region summarizes the usage information for substitute parts, if applicable.

The Calculated region summarizes usage information and is populated by the Create Task Parts History concurrent program. If you choose to enter the parts manually, your manually entered values override the calculated values.

Prerequisites

- A Task Template must be defined.
- Products and items must be defined.

Steps to Create a Manual Task Parts Definition

1. Navigate to the Define Task Parts window.

   (N) Setup > Task Parts

2. Enter a part number for the product in the Product field. The product description is displayed on the right.
3. The Task Template list of values displays task templates that have been previously defined. Enter a valid task template name or select one from the list of values. If the product - task template combination already exists, a message will appear. Use the query mode to update the product task - task template combination.
4. These fields are filled automatically as follows:
   - The Auto or Manual field defaults to Manual when you save your work.
   - The Times Used field will be populated with the number of times this task template has been used for this product, after running the Create Task Parts History concurrent program.
   - The Task % field will be populated with a number representing the percentage of times this task template was used for this product.
5. Enter the first part number in the Item field that you want to associate to this task parts definition.
6. The Unit of Measure defaults in the UOM field depending on the item you selected.
7. Enter a revision number, if applicable for this part.
8. Enter the quantity of parts required for this task.
9. Enter a value in the % field to represent how often this part is expected to be used in this task template product combination. This percentage value is used to determine the priority.
10. Optionally, enter the Start Date or End Date to enable or disable this parts task definition on a specific day.
11. Continue entering parts for this product task template as needed.
12. Save your work.

Steps to view and update an automatically created task parts definition

You cannot create a new parts definition for a product and task template that already has a parts definition. Instead, you must query the product - task and then update the items.

1. Navigate to the Define Task Parts window.

   (N) Setup > Task Parts

2. Query on the Product or Task Template that you want to view or update.

   The Auto or Manual field displays a value of Automatic if the task parts definition was automatically created by the Field Service debrief process.

   The Times Used field displays the number of times this task template has been used for this product, based on the results of the Create Task Parts History concurrent program.

   The Task % field displays a number representing the percentage of times this task template was used for this product, based on the results of the Create Task Parts History concurrent program.

   A list of parts required for this product and task template combination is displayed.

   The Manual Region may or may not be populated, depending on whether manual entries have been made.

   The Rollup Region summarizes the usage information for the item and substitute replacement parts, if applicable. If item A is a substitute part for item B (a unilateral substitute), then the rollup region for item A summarizes the usage calculation for items A and B. If item A is a substitute for item B **and** item B is a substitute for item A (a bilateral substitute), then the usage calculation is summarized for the item with the highest usage.

   The following fields are displayed:

   - The Quantity Used field displays the quantity of parts that have been used for this product - task definition.
   - The Times Used field displays the number of times this part has been used on this product - task template combination.
   - The Qty field displays the average quantity of parts used on this task. It is calculated by dividing the Quantity Used by the Times Used.
   - The % field displays how often this part has been used for this task template product combination.

- The Priority field is based on the percentage value in the previous field.
- The substitute item number is displayed in the Substitute Item field.

The Calculated region summarizes usage information based on the results of the Create Tasks Parts History concurrent program. The following fields are displayed:

- The Quantity Used field displays the quantity of parts that have been used for this product - task definition.
- The Times Used field displays the number of times this product has been used on this product - task template combination.
- The Qty field displays the average quantity of parts used on this task. It is calculated by dividing the Quantity Used by the Times Used.
- The % field displays how often this part has been used for this task template product combination.

The Start Date and End Date allow you to enter dates to enable or disable this parts task definition on a specific date.

2.4 Creating Internal Orders

When a field engineer discovers that additional parts are required to complete a service request task, the dispatcher is usually notified. The dispatcher then creates a follow up task and uses the Spares Management Parts Requirement form to generate an internal order for the required parts. The parts can be ordered from any internal inventory organization or from an outside supplier.

The internal order is booked and released for picking in Order Management. The internal order is received in Oracle Purchasing.

Prerequisites

- Define the parts required for a task if you want to use this feature.

  See .Defining Task Parts for additional information
- Create a follow up service request task to order the parts required.
- The task must be assigned to a field engineer before the internal order can be created.
- Review the Ordering Parts for Field Engineer Tasks topic in the Understanding Oracle Spares Management chapter if you need additional information.

Steps

1. Open the Parts Requirement window by using the following navigation path.

   (N) Spares Logistics > Parts Requirement

2. The View Parts Order Status form appears. You can use this form as a Find function. Otherwise, click **New** to enter a new part requirement.
3. The Parts Requirement form opens. Enter a service request and task number if this parts order is related to a service request task. If the parts order is not related to a task, you can skip these fields.
4. If the task has been assigned to a field engineer, values are automatically displayed in the Resource Type and Resource Name fields. If the task has not been assigned to a field engineer yet, you can enter a parts requirement. The internal order cannot be created until the task is assigned to a field engineer.
5. The Requirement Number field is populated after the parts requirement request is saved.
6. Select an organization from the Destination Organization list of values. This is the organization that contains the location to which the order will ship. The organization field is automatically populated if a resource has been entered.
7. Enter a date or use the list of values for the Need By Date field.
8. The Order Type can be selected from the list of values. A default order type can be defined in a profile option.
9. In the Ship To region, select Engineer, Customer or Special.

   See Selecting a Parts Order Ship To Address for additional information.

10. If you are manually assigning parts to this task, enter a part number in the Item field or select a part number from the Item list of values. This field is case sensitive. The Item Description is displayed at the bottom of the window.

    If you want to see the parts that have been predefined for this task, click **Parts Required**. Refer to Creating the Parts Requirement. Parts information is displayed only if parts have been defined for this task, and if the Times Used is greater than the profile valueshown in csp_task_history.

11. Enter a revision number, if applicable.
12. The unit of measure defaults in the UOM Code field, based on the part you selected.
13. Enter the quantity you are ordering in the Required Quantity field.

14. The Onhand Quantity field displays the field engineer's onhand inventory of the part being ordered. This quantity is useful for determining whether a part is actually needed.

15. The Available Quantity field displays the field engineer's available inventory of the part being ordered. This quantity is useful for determining whether a part is actually needed.

16. The Ordered Quantity field is populated when you click **Availability**. This field is calculated by subtracting the field engineer's Available Quantity from the Required Quantity. This field can be updated at the discretion of the user.

    See Finding Parts Availability for additional information.

17. Enter the appropriate values in the Ship Set field if you need to specify that certain items must be shipped together. A ship set is a group of order lines, linked by a common number, for which you want the full quantity to ship together.

18. Enter or select the name of the Source Organization from the list of values. The source organization is automatically populated if the Availability button is used.

19. Enter or select the name of the Source Subinventory from the list of values.

20. The Arrival Date field can only be populated if you click **Availability**, based on the parameters defined for the shipment method being used. This field cannot be entered manually.

21. The Order By Date is populated when you use the Availability button. This field can also be entered manually if the Availability button is not used.

22. The Shipping Method can be populated only when the Availability button is used. This field cannot be populated manually.

23. The Likelihood (%) field is populated automatically when the Parts Required button is used. This field indicates how likely it is that a particular part would be required, based on product task definition and based on historical usage.

24. The Order Number field is populated with the internal order number when the Create Order / Reservation button is used.

25. To find out where the part can be shipped from and its approximate arrival date, click **Availability**. The Availability button automatically populates the following fields: Order Quantity, Source Organization, Arrival Date, Order By Date, and Shipment Method. The Arrival Date and Shipment Method fields can only be populated by using the Availability button.

See Finding Parts Availability for additional information.

26. You can click **Substitutes** to find out if there are any substitute parts.

    The Substitutes window is displayed with availability information included. To select a substitute part, click **OK** and the substitute will automatically replace the original part in the main Parts Requirement window.

27. To create an internal order for the part(s), click **Create Order/Reservation**.

To further describe the procedure for ordering parts, the following topics are also covered:

- Creating the Parts Requirement
- Selecting a parts order ship to address
- Finding parts availability
- Viewing the status of parts orders

2.5 Creating the Parts Requirement

If you are using Scheduler, you can create a parts requirement for a related service request task without creating an internal order. Scheduler then uses the parts requirement along with parts availability information for the eligible field engineers to assign and schedule the task to a specific field engineer. The internal order is automatically created based on the Order By Date.

Prerequisites

- Task template must be defined.
- Product must be defined.
- Task Parts definition must be created.

Steps

1. Open the Parts Requirement window by using the following navigation path.

   (N) Spares Logistics > Parts Requirement

2. The View Parts Order Status form appears. You can use this form as a Find function. Otherwise, click **New** to enter a new part requirement.

3. The Parts Requirement window opens. Enter the service request and task number that is related to this parts requirement. If you enter only the task number, the service request number is retrieved for you.
4. If you are going to let Scheduler assign the task, you can leave the Resource Type and Resource Name fields blank.
5. The Requirement Number field is populated after the parts requirement request is saved.
6. Select an organization from the Destination Organization list of values. This is the organization that contains the location to which the order will ship. The organization is required only if the Availability button will be used.
7. Enter a date or use the list of values for the Need By Date field.
8. The Order Type can be selected from the list of values or defaults to the order type defined in a profile option.
9. In the Ship To region, select Customer or Special or leave blank if you want the part(s) to ship to the designated field engineer.

   See Selecting a Parts Order Ship To Address for additional information.
10. If parts have been predefined for this task, click **Parts Required**. Parts information is displayed only if parts have been defined for this task. The list of parts defined for this task is displayed. You can make changes to this list, if needed.
11. The Onhand Quantity field displays the field engineer's onhand inventory of the part being ordered. This quantity is useful for determining whether a part is actually needed. This field is populated only if a resource has been defined.
12. The Available Quantity field displays the field engineer's available inventory of the part being ordered. This quantity is useful for determining whether a part is actually needed. This field is populated only if a resource has been defined.
13. The Ordered Quantity field is populated when you check parts availability after you save the parts requirement.

    See Finding Parts Availability for additional information.
14. Enter the appropriate values in the Ship Set field if you need to specify that certain items must be shipped together. A ship set is a group of order lines, linked by a common number, for which you want the full quantity to ship together.
15. Enter or select the name of the Source Organization from the list of values.

16. Enter or select the name of the Source Subinventory from the list of values.
17. The Arrival Date field is populated if you click Parts Availability, based on the parameters defined for the shipment method being used.
18. The Order Date is populated if you use the integration with Scheduler. Scheduler calculates the order date and then places the order on the order date.
19. Select a shipping method from the Shipping Method list of values.
20. The Likelihood (%) field indicates how likely it is that a particular part would be required, based on product task definition and based on historical usage. This field defaults if a task parts definition exists for this part and task.
21. The Order Number field is populated with the internal order number when the parts order is complete.
22. Save your work without clicking **Create Order/Reservation** if you want to associate parts to a task without placing an order. Scheduler will create the order automatically during the task assignment process.

To further describe the procedure for ordering parts, the following topics are also covered:

- Defining Task Parts
- Creating internal orders
- Selecting a parts order ship to address
- Finding parts availability
- Viewing the status of parts orders

2.6 Selecting a Parts Order Ship to Address

The Ship To Address region of the Parts Requirement window allows you to ship parts to a field engineer, a customer or to a special ship to address.

2.6.1 Shipping parts to a field engineer or resource

The parts order must be related to a resource that has been assigned to the order.

Steps

1. Assign a resource and select the Engineer button in the Ship To region.
2. The default ship to address for the resource is automatically populated.

3. The Addresses button displays all addresses associated with the resource and an address other than the default for the resource can be selected.

2.6.2 Shipping parts to a customer

The parts order must be related to a customer task.

Steps

1. Select the Customer button in the Ship To region.
2. The list of values displays all addresses that have been associated with the assigned customer. Select the address for shipping the parts.

2.6.3 Shipping parts to a special address

Steps

1. Select the Special button in the Ship To region.
2. Select a country and the Location Address window appears.
3. You can enter a new address or select an existing address from the list of values by clicking **Addresses**. If you enter a new address, the address will be associated with the resource who is assigned to the order.
4. Enter a time zone associated with the address location from the Time Zone list of values.

2.7 Finding Parts Availability

The Parts Requirement window provides functionality for checking parts availability while creating an internal order. To determine parts availability, sourcing and available to promise (ATP) rules are used to help you determine when the parts order can be filled.

Steps

1. From the Parts Requirement window, click **Availability**.
2. The availability function compares the Required Quantity with the Available Quantity for the resource. The Order Quantity is equal to the Required Quantity minus the Available Quantity. The Order Quantity is automatically populated.

3. The Order Quantity, Source Organization, Arrival Date, Order By Date, and Shipment Methods fields are automatically populated when the Availability button is used

2.8 Shipping Parts

After the internal order is created, the items ordered are available for picking, packing and shipping in Oracle Order Management and Oracle Inventory.

For additional information about picking, packing and shipping, refer to the *Oracle Shipping Execution User's Guide*.

2.9 Receiving Shipments

After the parts on the internal order are shipped, the parts can be received in Oracle Purchasing.

For additional information about receiving, refer to *Receipts, Oracle Purchasing User's Guide*.

2.10 Viewing the Status of Parts Orders

You can view the status of a parts order at any point during its processing. You can search for parts orders using any of the fields in the top region of the View Spares Parts Order Status window.

Prerequisites

A parts order must be created.

Steps

1. To view the status of a parts order, use the following navigation path.

   (N) Spares Logistics > Parts Order Status

2. The View Parts Order Status find window opens.
3. Enter the query criteria for parts orders by using any combination of fields in the top region of the window. Click **Find** after entering your query criteria.
4. Rows returned by your query are displayed in the spreadtable at the bottom of the window. The spreadtable contains all information pertaining to the

processing of parts orders, from the time the order is placed until the order is received.

5. To access a parts order, highlight the order and click **OK**.

2.11 Ordering Parts Using Move Orders

Simple move orders for parts within a single inventory organization can be processed using the Move Order process that is located under Move Orders in the Navigator. Field Service Representatives, as well as Dispatchers and Managers, can process Move Orders.

The following procedures related to Spares Management Move Orders are discussed:

- Creating Move Orders
- Updating Move Orders
- Creating Manual Allocations
- Printing Picklists
- Confirming Picklists
- Creating, Printing and Confirming Packlists
- Receiving Shipments
- Viewing the Status of Move Orders

2.12 Creating Move Orders

Move Orders are used to request transfers of parts between subinventories within the same inventory organization.

2.12.1 Special Features

- You can drop ship the parts on a Move Order to a one time address, if needed.
- You can override the automatic receipt setting at the Move Order level. Automatic receipt is typically set at the subinventory level.
- You can change the source subinventory after the Move Order is approved.
- You can reference a service request and task number.
- You can access Move Orders from the Field Service Control Tower.

Prerequisites

- You may order only from a source subinventory which has an available quantity that is greater than or equal to the quantity you are trying to order.
- A move order can move parts only between subinventories within one inventory organization.

Steps

1. Navigate to the Move Order window from the Navigator or by clicking the Order Part button in the Parts Search Hierarchy window.
2. If the Select Organizations window appears, select an inventory organization.
3. Optionally enter the Source Subinventory and Destination Subinventory in the Default section of the Move Order window if you want this information to default to your move order. This defaulting feature is useful when you are entering multiple Move Orders with the same source and destination.
4. Enter the part number in the Item field. This field is case sensitive. If you entered the Move Order window from Parts Search Hierarchy, the part number defaults into the Item field.
5. As soon as you tab to the Unit of Measure (UOM) field, the Unit of Measure and the Date Required fields default.
6. You can change the Date Required value by using the list of values or by entering a new date.
7. Enter the move order quantity in the Quantity field.
8. In the Source tab, enter or select a source subinventory from the list of values. If you entered the Move Order window from Parts Search Hierarchy, the Source Subinventory defaults.
9. Optionally enter Locator, Lot Number, Serial from and Serial to if your part is using these features from Oracle Inventory.
10. Unit Number is not used for Spares Management.
11. In the Destination tab, select a destination subinventory from the list of values.
12. The Project and Task tab and the Control tab are not used for Spares Management.
13. In the Service Controls tab, optionally select the Service Request and Task numbers from the list of values.

14. Optionally enter the Customer PO and Comments.
15. If you want to override the automatic receipt setting for this move order, click the Special Ship To button. Check or uncheck the Auto Receipt check box. The default value comes from the destination subinventory. The automatic receipt feature is used when the shipment needs to be automatically transacted into the destination subinventory at the Confirm Ship step. Automatic receipt is often used along with a special ship to address when a drop shipment is required.
16. If you want to ship the parts to a one time address, click the Special Ship To button. The Special Ship to address is used when the Move Order needs to ship to an address other than the standard address assigned to the destination subinventory. You can enter a special address or click the Address button and select from a list of addresses previously entered for customers or locations.
17. Optionally select the Shipment Method and Carrier from the list of values.
18. Click **OK** to close the window.
19. Save your work. The Move Order number is displayed.
20. Click **Approve** to change the status of the Move Order to Approved. The Move Order must be in an Approved status for further processing to continue. If you click Approve before saving your move order, the save and the approval both occur.

2.13 Updating Move Orders

Steps

1. Navigate to the Create Move Orders window and query on your move order number. You can also find your move order in the View Move Order Status window.
2. If your move order is not approved, you can update any field in the move order.
3. If your move order is approved, you can update any field except Quantity and Destination Subinventory.
4. Save your changes.

2.14 Creating Manual Allocations

Allocations are used to reserve parts in a specific subinventory location for a move order. The allocation is the link between the Move Order and inventory. This functionality is typically used to ensure that the Move Order which has been generated to support a service request task will be shipped as a priority if inventories are limited. This step is optional because the Create Picklists process allocates the inventory automatically.

2.14.1 Special Features

- You can view On-hand and Available quantities.
- You can allocate the inventory with two mouse clicks if you do not need to view the quantities.

Prerequisite

The Move Order must be in an Approved status to create an allocation.

Steps

Use this procedure to view inventory quantities and then create a manual allocation for a move order.

1. Navigate to the Create Allocations window.

   (N) Spares Management > Spares Logistics > Spares Move Order > Reservations
2. If the Select Organizations window appears, select an inventory organization.
3. The Find Move Order Lines window opens.
4. Enter the Move Order number in the Number field of the Headers tab.
5. Click **Find** to open the Create Allocations window.
6. Click **View/Update Allocations** to open the Transact Move Order Line Allocations window.
7. Enter a quantity in the Quantity field and click **Update**.
8. Optionally click **View/Update Details** again to verify the allocated quantity. The allocation was created successfully if the Allocated Quantity field displays the allocated quantity.
9. Save your work.

Use this procedure to create a manual allocation for a move order if you do not need to view inventory quantities.

1. Navigate to the Create Allocations window.

(N) Spares Management > Spares Logistics > Spares Move Order > Reservations

2. If the Select Organizations window appears, select an inventory organization.
3. The Find Move Order Lines window opens.
4. Enter the Move Order number in the Number field of the Headers tab.
5. Click **Find** to open the Create Allocations window.
6. Click the Select box.
7. Click **Create Allocations**.
8. Save your work.

2.15 Printing Picklists

Picklists are used to produce a report that specifies the parts to be removed from their location to be shipped. Printing the picklist changes the Move Order status to Printed.

2.15.1 Special features

- If an allocation was not previously created, printing the Picklist creates the allocation automatically.
- You can print a picklist for an individual move order or you can print a picklist for a batch of move orders.

Prerequisites

- The Move Order must be in an Approved status.
- The quantity on hand must be greater than or equal to the quantity ordered on the Move Order.

Steps

Use this procedure to print picklists.

1. Navigate to the Print Picklists window.

   (N) Spares Management > Spares Logistics > Spares Move Order > Print Picklists

2. If the Select Organizations window appears, select an inventory organization.
3. The Submit Requests window opens.

4. To print a picklist for an individual Move Order, enter a Move Order number and click **OK**.
5. To print picklists for a batch of Move Orders, enter appropriate values in one or more of these parameters: Source Subinventory, Destination Subinventory, Date Required and Requestor. Click **OK**.
6. Click **Submit** to run the concurrent program which creates the picklist.
7. Click **No** in the Decision window if you are finished printing picklists.
8. You can optionally verify that the picklist was created by navigating to the View Move Order Status window. Enter your move order number in the Find window and click **Find**. The line status should indicate Printed, the Picklist number should be assigned to the Move Order and the picked quantity should display the correct quantity.

2.16 Confirming Picklists

Picklists must be confirmed so that the correct pick quantity is verified before shipping the parts. You must confirm the Picklist so that the Picklist will be available for inclusion on the Packlist. Confirming the Picklist changes the Move Order line status to Confirmed.

2.16.1 Special Features

- You can change the picked quantity during the confirmation step if it is in error on the Picklist.
- You can split picklist lines into multiple lines for shipping.

Prerequisites

The Picklist must be in Printed status before it can be confirmed.

Steps

Follow this procedure to confirm a picklist.

1. Navigate to the Confirm Picklists window.

   (N) Spares Management > Spares Logistics > Spares Move Order > Confirm Picklists

2. If the Select Organizations window appears, select an inventory organization.

3. The Find Picklists window opens. Enter a picklist number or select from the list of values and click **Find**.
4. The Confirm Picklist window opens and is populated with data from the selected picklist.
5. Optionally enter the Quantity Picked if it is different from the original picklist quantity.
6. Optionally click **Split Line** to split your shipment into more than one line. A new line is added and you can enter a quantity for the next line.
7. Click **Confirm Pick** to confirm the Picklist.
8. You can optionally verify that the picklist was confirmed by navigating to the View Move Order Status window. Enter your move order number or your picklist number in the Find window and click **Find**. The line status should indicate Confirmed and the picked quantity should display the correct quantity.

2.17 Creating, Printing and Confirming Packlists

A packlist is used to describe the contents of a box and to execute the physical shipment. Picklists are assigned to boxes and packlists are created for each box. Packlists must be printed and then confirmed. The confirmation process transacts inventory out of the source subinventory, relieves the allocated quantity and transacts inventory into the destination subinventory if the auto receipt feature is enabled. If auto receipt is disabled, the shipment is transacted into the intransit subinventory.

2.17.1 Special Features

- You can find consolidation opportunities by viewing all pick lines destined for the same ship to address.
- You can assign multiple pick lines to one box.
- You can split pick lines into multiple boxes.
- The ship to address from the Picklist is automatically assigned to the packlist header.
- You can print the packlist and confirm the shipment from the same window.

Prerequisite

The Picklist must be in a Confirmed status to be available for selection in a packlist.

Steps

Follow this procedure to confirm a packlist.

1. Navigate to the Create Packlists window.

   (N) Spares Management > Spares Logistics > Spares Move Order > Create Picklists

2. If the Select Organizations window appears, select an inventory organization.
3. Click the + sign in front of Packing Lists. The Packing Lists folder expands to display the Open, Received and Shipped status folders.
4. Click the + sign in front of the Open folder to display open packing lists.
5. Click the Open folder and then right click it. A pop-up menu appears.
6. Select Create Packing List. The Define Packlist window appears with the Packlist Details tab displayed.
7. Optionally enter shipping information including Carrier, Shipment Method, Waybill, Comments, Ship to Subinventory and Location Address. You can also enter this information later when you are finalizing your packlist.
8. Save your work to create the Packlist. Your packlist appears under the Open folder.
9. Click the + sign in front of your packlist to display Box 001.
10. Click Box 001 to open the Box Details tab. You can enter the weight here.
11. Open the Picked Items tab. The Find Picklists window opens.
12. Enter the picklist number and click **Find**, or leave the picklist number blank and click **Find** to execute a blind query for all picklists that have not been previously assigned to a packlist.
13. To add the entire contents of a picklist to a box, click the picklist number.
14. Click **Add** to assign the picklist to the selected box. The selected pick line disappears from the Picked Items tab and is transferred to the selected box. All other pick lines that are assigned to a ship to address that differs from the pick line just selected, disappear from the Picked Items tab.

To add more pick lines to the same box, repeat steps 10 through 14.

15. To add a second box to your packlist, click your packlist folder and then right click it. A pop-up menu appears.

16. Select Create Box, optionally enter the weight in the Box Details tab and click Save. Your new box number appears under your packlist.
17. To split the quantity on a pick line into more than one box, click the quantity value of a pick line in the Picked Items tab. The Split Quantity window opens.
18. Enter the quantity to be assigned to the first box and click OK.
19. To add the remaining quantity to another box, click on the other box number.
20. Click the picklist number containing the remaining quantity and click Add.
21. To finalize the packlist, click the packlist number.
22. Enter values for carrier, shipment method, waybill and comments in the Pack List Header tab if you did not previously enter these values.
23. Enter the box weight in the Box Details tab if you did previously enter this.
24. Save your work to create the packlist.
25. Click Print in the Pack List Header tab to the print the Packlist. The Submit Request window opens.
26. Click **Submit** to print the Packlist and click **No** in the decision window.
27. Click **Confirm** in the Pack List Header tab to confirm the shipment.

2.18 Receiving Shipments

Receiving parts is executed automatically if the auto receipt flag is enabled. If the auto receipt flag is disabled, use the Receive Parts window to receive parts manually. Receiving is performed at the packing list level. The receipt transaction relieves the intransit subinventory and increments the destination subinventory.

2.18.1 Special Features

- You can correct the quantity received if it differs from the quantity shipped.
- If the quantity received is correct, you can receive the entire shipment with one click.
- You can close the receipt with a short quantity, in the case of lost parts, for example.

Prerequisite

The Packlist must be in a Shipped status for receiving.

Steps

Follow this procedure to manually record a receipt of parts.

1. Navigate to the Receive Shipments window. The Find Packlists window opens.

   (N) Spares Management > Spares Logistics > Spares Move Order > Receive Shipments

2. Enter a Packlist and click **Find** or leave the Packlist field blank and click **Find** to execute a blind query. The Receive Parts window opens with a list of shipments that match your search criteria.
3. If the quantity shipped is the same as the quantity received, select the packlist number and click **Receive**.
4. If the quantity shipped is different from the quantity received, click the quantity value under the This Receipt column.
5. Enter the actual quantity received and click **Receive**.
6. Optionally close the partially received line by selecting the line and clicking **Close Line**. To activate the **Close Line** button, you must set up an inventory account alias, named CSP_RECEIPT, in the relevant organization. For information about setting up the account alias, refer to the *Oracle Spares Management Implementation Guide* section on setting up inventory organizations.

2.19 Viewing the Status of Move Orders

The View Move Order Status window allows the viewing of move order details at every step in the logistics process.

2.19.1 Special Features

- You can track Move Order quantities throughout the logistics process.
- You can view the date and time of each step of the logistics process.
- You can view details such as picklist number, packlist number, carrier and waybill number.
- You can navigate directly to the Move Order window by clicking on the move order number.
- You can view multiple move orders by using combinations of the parameters in the Find window, including Move Order number, Source Subinventory,

Destination Subinventory, Picklist number, Packlist number, Waybill number and Line Status.

Steps

Follow this procedure to view the status of one or more move orders.

1. Navigate to the View Move Order Status window. The Find window opens.

   (N) Spares Management > Spares Logistics > Spares Move Order > Move Order Status

2. Enter the criteria that you want to use to limit the results of your search in the Find window and click **Find**. A list of move orders that match your search criteria is displayed.

3. The quantities that appear in the bottom of the window for On-hand and Available reflect real-time quantities that are updated whenever a transaction occurs.

4. Scroll to the right to view all details for move orders.

5. Optionally click on a move order number to navigate to the Move Order window.

2.20 Using the Parts Search Hierarchy to Find a Part

The Parts Search Hierarchy is used to locate parts that are needed for a service task. The Parts Search Hierarchy uses the structure defined in Reporting Hierarchies, which is described in Administering Reporting Hierarchies. You can see all of the locations in your hierarchy. You can search by part number to see all locations which have the part or you can search by location and see all parts in the requested location. You can view parts information at the subinventory location level or the node level.

From the Parts Search Hierarchy window, you can optionally navigate directly to the Move Order window. If you choose to take this shortcut, the item and source subinventory information defaults to the Move Order window from the Parts Search Hierarchy window. You cannot create an internal order from the Parts Search Hierarchy window.

Prerequisites

None

Steps

Use this procedure to search for a location that contains a sufficient quantity of a part so that you can process a move order for the part.

1. Navigate to the Parts Search Hierarchy.

   Spares Management > Spares Logistics > Spares Move Order > Part Search Hierarchy

2. If the Select Organizations window appears, select an inventory organization.
3. Optionally click the hierarchy name from which you want to search for the part.
4. To search for a specific part from the top level of the hierarchy, click the flashlight in the tool bar. The Find Items window opens.
5. Enter a part number in the Item field.
6. Click **Find**. The Parts Status tab displays the nodes that contain the part you searched for.
7. Click node names to see a list of subinventories that contain the part you searched for.
8. Click a subinventory name to see the updated On-hand and Available quantity for this part. On the spreadtable, the Onhand column shows the quantity as of the last time the Create Part Availability Data program was run. The updated values are displayed at the bottom of the window. The On Hand quantity includes reserved quantities. The Available quantity does not include reserved quantities.
9. If you want to create a Move Order from this window, click **Order Part**. The Order Part button is enabled only when you are in a subinventory which has an available quantity that is greater than or equal to the quantity you are trying to order.

Note: You can navigate to a specific node or subinventory first before you search for a part.

Note: You can display selected nodes and subinventories in the navigator tree. A red X in front of a subinventory indicates a defective subinventory. A green checkmark in front of a subinventory indicates a usable subinventory.

2.21 Managing Excess Returns

Spares Management provides a process for managing the return of excess parts. You can define business rules so you can focus only on the excess parts that have the highest cost impact. Excess parts are defined as those parts whose inventory balance is greater than the maximum level defined in the ASL. If the maximum level is null, a zero quantity is assumed. Internal orders or inter-organization transfers for excess parts are created when the return of excess parts is approved.

An explanation of these steps follows:

- Creating Excess Lists
- Returning Excess Parts

2.21.1 Creating Excess Lists

You can create excess lists for both usable and defective parts. Run the Create Excess List concurrent program to identify the excess parts and to apply your excess rules to filter for high impact excess parts.

Prerequisites

Define Excess Rules.

Steps

1. Follow this navigation path to create excess lists.

   (N) Spares Planning > Reports and Planning > Create Excess Lists
2. Tab to the Parameters field to open the Parameters window.
3. Select an inventory organization for which you want to create an excess list.
4. Select either Organization or Subinventory for the Planning Level. The planning level is based on the organization type that is defined in Spares planning. If the organization type is field engineer, the planning level populates with subinventory. If the organization type is a warehouse, the planning level is organization. If you choose to create the excess list at the organization level, the calculation for excess parts is based on the maximum and on-hand values for the entire organization. If you choose to create the excess list at the subinventory level, the calculation for excess parts is based on the maximum and on-hand values for all subinventories within the organization. If you select Subinventory for the Planning Level, you can optionally select a specific subinventory for the creation of the excess list.
5. Enter the number of days in the Demand Cutoff field that you want to exclude when calculating demand.

6. Select Yes or No in the Net Unreserved Orders field to include or exclude unreserved inbound and outbound orders in the calculation of excess parts.
7. Select Yes or No in the Net Reserved Orders field to include or exclude reserved inbound and outbound orders in the calculation of excess parts.
8. Select Yes or No in the Net WIP Demand field to include or exclude WIP orders in the calculation of excess parts. If you do not enter a value in the Net WIP Demand field, a No is assumed.
9. Select Yes or No in the Non-nettable Subinventories field to include or exclude the subinventories in this category. The non-nettable subinventory condition is used to exclude the inventory from the supply - demand calculations.
10. Select Usable or Defective in the Condition Type field.

2.21.2 Returning Excess Parts

You can use the Return Excess window to view and approve excess parts for return.

Prerequisites

- Define Excess Rules.
- Run the Create Excess Lists concurrent program.

Steps

1. Navigate to the Return Excess window by using the following navigation path:

   (N) Spares Logistics > Return Excess

2. The top region of the window provides a find window to search for the excess lines that you want to review. You can search by Resource Type, Resource Name, Inventory Organization, Subinventory, or Item. You can specify an excess line status of Open or Returned or All statuses. You can also specify usable and/or defective parts. After you enter your search criteria, click **Find**.
3. The results of your query are displayed in the Excess Lists region. Identifying information is displayed, such as item number, unit of measure, organization, subinventory, condition type, resource type, and resource id. Also displayed is the following information regarding inventory levels:
   - Excess quantity - The quantity that is in excess of the maximum quantity as defined in the ASL after applying the excess rules.
   - Returned quantity - The quantity that is being returned.

- Current excess quantity - The difference between the Excess Quantity and the Returned Quantity.
- Maximum quantity - The maximum quantity as defined in the ASL.
- Current return quantity - Manual entry to change the Current Excess Quantity.
- Excess status - Open status excess lines appear in the Excess Lists spreadtable. Modified status excess lines appear in the Return Lists spreadtable. Returned status excess lines have been returned on an order and appear in the Excess Lists spreadtable only if requested in the Find function.

4. The bottom region of the window is called Return Lists and displays excess lines that have been approved. When the window is opened, this region is empty.
5. If you want to update the quantity before approving the return, click on the Current Excess Quantity. The Return Quantity window opens and you can update the Return Quantity. The quantity can only be modified while the excess line appears in the Excess Lists spreadtable. Changing the Current Excess Quantity automatically moves the excess line down to the Return Lists spreadtable and changes the status to Modified.
6. To approve an excess line for return, highlight the line and click the down arrow, which moves the line to the Return Lists region (if the return organization is the same as existing lines in the region). When you approve an excess line, the Status field changes to Modified.
7. You can use the up arrow to unapprove an excess line that was just approved. The status of the Excess Line changes from Modified to Open and the line moves from the Returns List to the Excess List spreadtable.
8. When you finish approving excess lines for return, click **Return.**
9. The Return Item window opens. The Source Organization and Source Subinventory fields display default values.
10. For a resource, the Return Organization and Return Subinventory fields contain default values if the resource has a Return To organization and subinventory defined. Otherwise, for a warehouse, select an organization from the Return Organization and Return Subinventory lists of values.
11. For a resource, the Transit Type field can be either Direct or Intransit.

- Direct is used when the resource delivers the excess directly to the Return To location.
- Intransit is used when the parts are shipped to the Return To location.

12. Enter values for the Carrier, Waybill and Shipment Number if the parts are being shipped to the Return To location.
13. Click **OK** to complete the return. For a resource, an Inter-Organization transfer order is created. For a warehouse, an internal order is created.

3

Using Loop and Location Planning

This chapter provides process-oriented, task-based procedures for using Oracle Spares Management to perform spare parts planning tasks.

Topics covered are:

3.1 Loop Notifications

Planning at the loop level involves the comparison of actual loop quantities to the Master Stock List quantities. When the available quantities of parts are greater than or less than the inventory levels defined for the parts loop, a notification is created for review and processing by the planner.

In the Parts Loop area of the Planner's Desktop, you can administer the Master Stock List for the loop. You can define and maintain the loop parameters such as selecting the calculation and forecast rule. You can also view part availability for the loop. Finally, you can assign, update and view the usable and defective subinventories that are included in the parts loop.

Prerequisites

The steps for defining a parts loop are described in detail in the *Oracle Spares Management Implementation Guide* and are summarized below:

1. Create the Parts Loop
   a. Select a calculation rule for the parts loop to determine how the Actual Available quantity is calculated for the loop
   b. Select a forecast rule for the parts loop to define how the forecast is created for the loop
2. Assign subinventory locations to the Parts Loop
3. Create the Master Stock List for the Parts Loop
   a. Define the parts to be stocked in the loop
   b. Define the total loop quantity for each part
   c. Define the minimum usable quantity for each part

Steps

The following steps for using parts loops are described in more detail:

- Creating Part Availability Data
- Creating Usage History
- Viewing Usage and Forecast Data
- Creating Notifications
- Processing Notifications

3.2 Creating Part Availability Data

The Create Part Availability Data concurrent program compiles part availability data for the loop. This availability data is used to update summary quantities that are displayed in planning loops and hierarchies. The summary data that appears at the node levels in the Planner's Desktop are updated only by this concurrent program. The availability data is also used to determine whether notifications should be generated.

Prerequisite

Parts loops must be defined.

Steps

1. Navigate to the menu to run the program.

   (N) Reports and Programs > Create Part Availability Data
2. Click **Submit**.
3. Click **No** in the Decision window.
4. To see the status of your concurrent request, click **View** from the menu and click **Requests**.
5. Click **Find** to view the status of all your requests.

3.3 Creating Usage History

Usage activity is a component of planned inventory levels and is also used for forecasting future usage activity. The Create Usage History concurrent program gathers usage statistics, which can be viewed in the Planner's Desktop.

The procedures for running the Create Usage History concurrent program follows.

Prerequisites

None

Steps

1. Navigate to the menu to run the program.

   (N) Reports and Programs > Create Usage History
2. There are no parameters for this program, so click **Submit**.
3. Click **No** in the Decision window.
4. To see the status of your concurrent request, click **View** from the menu and click **Requests**.
5. Click **Find** to view the status of all your requests.

3.4 Viewing Usage and Forecast Data

A forecasting tool is available on the Planner's Desktop to aid the planner in the planning process. Multiple forecasting techniques are provided and the forecast for the part is viewable by location, loop, and reporting hierarchy.

Forecasting information can be based on four different methods of forecast calculations. Refer to Administering Forecast Rules for additional information about forecast methods.

Prerequisites

Run the Create Usage History concurrent program to gather usage statistics.

Steps

Use this procedure to update the usage history information and view the forecast and usage information.

1. Navigate to the Parts Loop in the Planner's Desktop.

   (N) Planner's Desktop > (T) Parts Loop (top icon on the left)

2. Click the + sign next to Parts Loop.
3. Click on the parts loop for which you want to view forecasting information.
4. Open the Parts Status tab.
5. Click **Find** in the Find Items window to execute a blind query for all parts.
6. Click on an Item number and view the Usage/Forecast information in the bottom of the window.
7. Open the Graph tab to view the usage data, represented by a red line, and the forecast data, represented by a green line.

3.5 Creating Notifications

The Create Notifications concurrent program compares the Available quantities that are calculated by the Create Part Availability Data concurrent program to the desired quantities that were defined by the MSL in the parts loop. Notifications to the planner are created when one of the following conditions occurs:

- The Available quantity for this part is above the total loop quantity by more than the allowable percentage

- The Available quantity for this part is below the total loop quantity by more than the allowable percentage.
- The usable quantity for this part is below the minimum usable quantity

Prerequisite

Run the Create Part Availability concurrent program first, so the notifications are based on the most recent quantities.

Steps

1. Navigate to the menu to run the program.

   (N) Reports and Programs > Create Notifications

2. Click **Submit**.
3. Click **No** in the Decision window.
4. To see the status of your concurrent request, click **View** from the Tools menu and click **Requests**.
5. Click **Find** to view the status of all your requests.

3.6 Processing Notifications

Notifications are used for advising the planner that the parts inventory is above or below quantities defined in the Master Stock List. You can view and take action on open notifications in the Planner's Desktop. Notifications have a status of either Open, Pending or Closed.

Prerequisite

Run the Create Notifications concurrent program.

Steps

1. Navigate to the Planner's Desktop.

   (N) Planner's Desktop > (T) Notifications (third icon down on the left)

2. Click the + sign in front of Notifications.
3. Click the + sign in front of the parts loop name to open the loop folder.

4. The notification categories are Above, Below and Not Enough Usable Parts. Click the + sign in front of the notification category you want to view. Within each notification category, you can choose Open, Closed, or Pending.
5. Click on the Item number in the Open folder to view the notification.
6. Open the Master Stock List tab to view the Master Stock List parameters for the Item in the notification.
7. Open the Parts Status tab to view the details of the part's status. The detailed view of the status includes the availability elements for the part.
8. There are five actions you can take on an open notification:
    a. You can change the quantity on the Master Stock List.
    b. You can create a move order to transfer parts to the location that needs them.
    c. You can create an external requisition to purchase an additional quantity of parts.
    d. You can create a WIP order to have the parts repaired internally.
    e. You can create an external requisition to have the parts repaired externally.
9. After taking the appropriate action regarding the notification, you can update the status of the notification to Pending or Closed.

3.7 Location Planning

Planning for the field engineer or warehouse is accomplished by running a concurrent program to calculate recommended min-max levels and then processing the recommendations by approving, updating or rejecting the recommendations. A recommended Authorized Stock List (ASL) is generated for each field engineer represented by a subinventory and each warehouse represented by an organization. The calculation of the ASL is based on historical usage for the field engineer or warehouse and planning parameters which are used to control service level and inventory.

The following steps are covered in more detail:

- Updating the Planning Parameters
- Creating ASL recommendations
- Processing ASL recommendations

3.8 Updating the Planning Parameters

This step is optional and may be skipped if you do not want to change your previously defined planning parameters. Planning parameters are used by the Create ASL Recommendations concurrent program to calculate recommended min-max levels. For additional information about how to update the planning parameters, refer to Administering Planning Parameters.

3.9 Creating ASL Recommendations

This concurrent program is used to generate the new recommended min - max levels for the field engineers and spares warehouses. The min - max calculation is based on a forecast of historical usage and the planning parameters which determine desired level of service and inventory levels.

Steps

1. Navigate to the menu to run the program.

   (N) Reports and Programs > Create ASL Recommendations

2. Click **Submit**.
3. Click **No** in the Decision window.
4. To see the status of your concurrent request, click **View** from the Tools menu and click **Requests**.
5. Click **Find** to view the status of all your requests.

3.10 Processing ASL Recommendations

The Planning tab of the Planner's Desktop allows you to view and process the recommendations generated for Authorized Stock Lists. You can view the recommendations for the entire organization, for individual inventory organizations or for subinventories. The recommendations are provided in a cost summary format so you can focus on the changes that result in the highest cost. A total cost summary is also displayed so you can see the total impact of the recommendations.

The recommended ASL is generated for the organization only if the organization is designated as a warehouse in the planning parameters. The recommended ASL is generated for the subinventories only if the organization is designated as Field Engineer in the planning parameters.

The highest level view of ASL recommendations is called the planning node. At this level, you can easily identify parts that would result in the highest cost impact if the recommendation was accepted. You can then drilldown to find the inventory organizations and subinventories most impacted by the recommendation. At the organization level, you can approve or reject the recommendations. At the subinventory level, you can update, approve or reject the recommendations.

A suggested procedure for using the Planning functionality in the Planner's Desktop to process ASL recommendations follows.

- View ASL recommendations at the planning node level
- View and process ASL recommendations at the inventory organization level
- View and process ASL recommendations at the subinventory level

Prerequisites

Run the Create ASL Recommendation concurrent program.

Steps to view ASL recommendations at the planning node level

1. Navigate to the Planning tab using the following navigation path.

   (N) Planner's Desktop > (T) Planning (bottom icon on the left)
2. The Planning Parameters tab opens by default. You can update the parameters here, if needed. If you update the planning parameters, you should run the Create ASL Recommendations concurrent program again.
3. Open the Recommendations tab to view planning information summarized for all organizations under the planning node.
4. The Apply Parameters window opens and displays the Total Actual Cost and Total Recommended Cost for all parts under the planning node.
5. The top region of the Recommendations tab displays the Delta Cost, Actual Cost and Cost Recommended for all items in the planning node. The Accept and Reject buttons are disabled because cost recommendations cannot be accepted or rejected at the planning node.
   - The Delta Cost column displays the change in cost between the previous maximum level and the new recommended maximum level.
   - The Actual Cost column displays the cost of the existing maximum level.
   - The Cost Recommended column displays the cost of the new recommended maximum level.

None of the columns in the Recommendations tab are updateable at the planning node level.

6. The bottom region of the Recommendations tab displays detailed information about the part highlighted above. At the planning node, the Forecast and Min-Max tabs are disabled.
7. The Usage tab displays the quantity of debrief parts used summarized for all organizations during the periods defined in the forecast rule being used.
8. The Drilldown tab opens a spreadtable that displays detailed cost information by organization.

Steps to view and process ASL recommendations at the inventory organization level

1. Navigate to the Planning tab using the following navigation path.

   (N) Spares Planning > Planner's Desktop (T) Planning (bottom icon on the left)
2. The Planning Parameters tab opens by default. You can update the parameters here, if needed. If you update the planning parameters, you should run the Create ASL Recommendations concurrent program again.
3. Select an inventory organization under the planning node.
4. Open the Recommendations tab to view planning information for this inventory organization.
5. The Apply Parameters window opens and displays the EDQ Factor and Service Level parameters for the organization. This window can be used to change the planning paramters using the Apply button. The Total Actual Cost, Total Recommended Cost and Safety Factor fields are also displayed.
6. The top region of the Recommendation tab displays the Delta Cost, Actual Cost, Cost Recommended and Min-Max recommendations for the organization.
   - The Delta Cost column displays the change in inventory level between the previous maximum level and the new recommended maximum level.
   - The Actual Cost column displays the cost of the existing maximum level.
   - The Cost Recommended column displays the cost of the new recommended maximum level.
   - The Min and Max columns are the current values set at the organization level.
   - The Min and Max recommendations are derived from the ASL calculation.

- The Average Weekly Usage is derived from the forecast calculation.
- The Delta Min and Max values represent the difference between current and recommended values.
- The Status is initially set as open. The status changes when the Accept or Reject buttons are used to process the recommendation.

7. All columns in the spreadtable can be sorted in ascending or descending order. For example, if you want to view the parts that have the highest Delta Cost, you can click on the Delta Cost column heading to sort the list of parts in descending Delta Cost order.
8. The bottom region of the Recommendations tab presents additional information to assist you in your decision about setting the min - max levels for the part that is selected in the top region:
   - The Usage tab displays the quantity of parts used during the number of periods defined in the forecast rule being used.
   - The Forecast tab displays the forecasted usage for this part, based on historical usage and forecast rule being used.
   - The Min-Max tab allows you to update the recommended minimum and maximum levels for this part.
   - The Drilldown tab allows you to drill down to cost information by subinventories for the part selected.
9. Click **Accept** to accept the recommendations and update the ASL Min-Max quantities in the parts loop.
10. Click **Reject** to cancel the recommendations.

Steps to view and process ASL recommendations at the subinventory level

1. Navigate to the Planning tab using the following navigation path.

   (N) Planner's Desktop > (T) Planning (bottom icon on the left)
2. The Planning Parameters tab opens by default. You can update the parameters here, if needed. If you update the planning parameters, you should run the Create ASL Recommendations concurrent program again.
3. Select an inventory organization under the planning node.

4. Select a subinventory under the inventory organization. The top region of the Recommendation tab displays the Delta Cost, Actual Cost, Cost Recommended and Min-Max recommendations for all items in the subinventory.
   - The Delta Cost column displays the change in inventory level between the previous maximum level and the new recommended maximum level.
   - The Actual Cost column displays the cost of the existing maximum level.
   - The Cost Recommended column displays the cost of the new recommended maximum level.
   - The Min and Max columns are current values set for the item at the subinventory level.
   - The Min and Max recommendations are derived from the ASL calculation.
   - The Average Weekly Usage is derived from the forecast calculation.
   - The Delta Min and Max values represent the difference between current and recommended values.
   - The Status is initially set as open. The status changes when the Accept or Reject buttons are used to process the recommendation.
5. The bottom region of the Recommendations tab presents detailed information to assist you in setting or approving the min - max levels for the part that is selected in the top region.
   - The Usage tab displays the quantity of parts used during the number of periods defined in the forecast rule being used.
   - The Forecast tab displays the forecasted usage for this part, based on historical usage and the forecast rule being used.
   - At the subinventory level, you can update the recommended quantities in the Min-Max tab as needed. When you open the Min - Max tab, a window opens that allows you to enter a new quantity.
   - The Drilldown tab is disabled at this level.
6. The Apply Parameters window displays the EDQ Factor and Service Level parameters for the organization. The Total Actual Cost, Total Recommended Cost and Safety Factor fields are disabled.
7. Click **Accept** to accept the recommendations and update the ASL Min-Max quantities in the parts loop.
8. Click **Reject** to cancel the recommendations.

4

Administering Oracle Spares Management

This chapter provides task-based procedures for administering Oracle Spares Management.

Topics covered are:

- Administering Planners
- Administering Inventory Organizations
- Administering Subinventories
- Administering Items
- Administering Calculation Rules
- Administering Forecast Rules
- Administering Parts Loops
- Administering Master Stock Lists
- Administering Authorized Stock Lists
- Administering Reporting Hierarchies
- Administering Excess Rules
- Administering Delivery Times
- Administering Addresses and Subinventories
- Administering Planning Parameters

4.1 Administering Planners

Use this procedure to define planners. In Spares Management, inventory planners are required to be associated with parts loops.

Prerequisite

The employee to be defined as a planner must have already been defined in Oracle Human Resources or Oracle Inventory. Please refer to the *Oracle Inventory User's Guide* for additional information about planners.

Steps

1. Navigate to the Planners setup form.

   (N) Inventory > Planners

2. Enter the name of the planner in the Name field.
3. Enter the user role in the Description field.
4. Select the employee name from the Employee list of values.
5. Save your work.

4.2 Administering Inventory Organizations

Inventory organizations are defined in Oracle Inventory. Spares Management uses inventory organizations as a structure for subinventories which contain spare parts. Refer to the following sections of the *Oracle Inventory User's Guide* for detailed instructions on how to setup and administer inventory organizations:

- Overview of Inventory Structure
- Creating an Organization
- Defining Organization Parameters

In the Organization Classification section, each Spares Management organization needs to include ***Inventory Organization*** as a classification. Otherwise the setup is standard.

4.3 Administering Subinventories

Standard setup is required in Oracle Inventory for subinventories. Subinventories are unique physical or logical separations of material inventory.

Spares Management uses subinventories for tracking usable and defective spare parts. The minimum setup for subinventories to be used in Spares Management follows. For detailed information regarding subinventories, please refer to the *Oracle Inventory User's Guide*.

Steps

Use this procedure and refer to the complete procedure in the *Oracle Inventory User's Guide* define a subinventory.

1. Navigate to the Subinventory setup form.

   (N) Inventory > Setup > Organizations > Subinventories

2. Enter a name for the subinventory.
3. Enter a description for the subinventory.
4. Check the following check boxes so the subinventory can be used by Spares Management:

- Qty Tracked
- Asset Subinventory
- Allow Reservation

4.4 Administering Items

Standard setup in Oracle Inventory is required for Items. Spares Management uses Items as Part Numbers. For detailed information about administering items, please refer to the *Oracle Inventory User's Guide*. The specific requirements needed for items to be used by Spares Management are as follows:

1. **Inventory Item** should be checked in the Inventory tab.
1. The Billing Type is used for field service invoices. The choices in the list of values are Material, Expense and Labor. Material should be selected.
2. The Recovered Part Disposition field is used to define items as spare parts. The choices in the list of values are Fast Return, Slow Return and No Return. If this field is not populated, the item will not be available in Spares Management.

4.5 Administering Calculation Rules

Calculation rules are used to determine which availability elements are included in the Total Available quantity which is used along with the Master Stock List to create Notifications. Calculation rules are assigned to parts loops. For additional information regarding calculation rules, please refer to the *Oracle Spares Management Implementation Guide.*

The following tasks can be performed to administer calculation rules.

- Defining a calculation rule
- Updating a calculation rule
- Deleting a calculation rule

4.5.1 Defining a Calculation Rule

Prerequisites

None

Steps

1. Navigate to the Calculation Rules setup form.

   (N) Spares > Setup > Calculation Rules

2. Enter a rule name in the Name field.
3. Optionally enter a description in the Description field.
4. Select the appropriate availability elements. The choices are:
   - Usable on-hand
   - Defective on-hand
   - Purchase orders
   - WIP orders
   - Requisitions
   - Sales Orders
   - Move Orders
   - Inter Org transfers

- In-transit Move Orders
- Include DOA (Defective on Arrival)
- Supercession

5. Enter a tolerance percent. This is used in loop planning to filter notifications that are within the tolerance percent. If a 10 is entered, a notification will be sent whenever the quantity is higher or lower than the MSL quantity by at least 10%, for example.
6. Enter the time fence in days. This is used in loop planning to filter incoming and outgoing orders scheduled beyond a specified time period.

4.5.2 Updating a Calculation Rule

Prerequisites

None

Steps

1. Query for the calculation rule you want to change or use Control-F11 to query all existing calculation rules.
2. If you queried for all rules, arrow down to the calculation rule to be changed.
3. Enter changes as appropriate in the window and save your work.

4.5.3 Deleting a Calculation Rule

Prerequisites

Do not delete any calculation rule that is currently assigned to a Parts Loop. If the calculation rule to be deleted is currently assigned to a Loop, assign another calculation rule to the Loop before deleting the calculation rule.

Steps

1. Query for the calculation rule you want to delete or use Control-F11 to query all existing calculation rules.
2. If you queried for all rules, arrow down to the calculation rule to be deleted.
3. Click the Red X in the Toolbar to delete and save your work.

4.6 Administering Forecast Rules

Forecast rules are used to define how the forecast information is calculated. For additional information regarding forecast rules, please refer to the *Oracle Spares Management Implementation Guide.*

The following tasks can be performed to administer forecast rules:

- Defining forecast rules
- Updating forecast rules
- Deleting forecast rules

4.6.1 Defining a Forecast Rule

Prerequisite

None

Steps

1. Navigate to the Forecast Rules setup form.

   (N) Spares > Setup > Forecast Rules

2. Enter a rule name in the Name field.
3. Optionally enter a description in the Description field.
4. Select a forecast method from the Forecast Method list of values. The choices are:
   - Simple Average
   - Weighted Average
   - Exponential Smoothing
   - Trend Enhanced
5. In the Period Type field, select Weekly or Periodic. Periodic refers to accounting periods.
6. In the Period Size field enter the number of days. This is used in ASL forecasting to define the size of the history and forecast periods
7. Enter the number of Forecast and History periods

8. Depending on which forecast method you chose, the remaining fields in the window vary.

4.6.2 Updating Forecast Rules

Prerequisite

None

Steps

1. Query for the forecast rule you want to change or use Control-F11 to query all existing forecast rules.
2. If you queried for all rules, arrow down to the forecast rule to be changed.
3. Enter changes as appropriate in the window and save your work.

4.6.3 Deleting Forecast Rules

Prerequisite

Do not delete any Forecast Rule that is currently assigned to a Parts Loop. If the Forecast Rule to be deleted is currently assigned to a Loop, assign another Forecast Rule to the Loop before deleting the Forecast Rule.

Steps

1. Query for the forecast rule you want to delete or use Control-F11 to query all existing forecast rules.
2. If you queried for all rules, arrow down to the forecast rule to be deleted.
3. Click the Red X in the Toolbar to delete and save your work.

4.7 Administering Parts Loops

The following tasks can be performed to administer parts loops:

- Creating a parts loop
- Updating a parts loop
- Deleting a parts loop
- Maintaining subinventories in parts loops

- Adding subinventories to a parts loop
- Updating subinventories in a parts loop
- Deleting subinventories from a parts loop

4.7.1 Creating a Parts Loop

Prerequisites

You must have defined a planner, calculation rule and forecast rule to be used in the parts loop. Refer to Administering Planners, Administering Calculation Rules and Administering Forecast Rules for additional information.

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)
2. Highlight the Parts Loops folder in the Navigator tree.
3. Right-click the Parts Loops folder to open a pop-up menu.
4. Select Create Parts Loop in the menu. The Loop Details tab is active.
5. Enter a parts loop name in the Loop Details tab.
6. Optionally, enter a description for the parts loop.
7. Select a Planner from the list of values.
8. Select a Calculation Rule from the list of values.
9. Select a Forecast Rule from the list of values.
10. Save your work. The new parts loop appears in the Navigator.

4.7.2 Updating a Parts Loop

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)
2. Highlight the Parts Loops folder in the Navigator tree.
3. Click the specific loop to be changed.

4. Enter the changes in the Location Details tab and save your work.

4.7.3 Deleting a Parts Loop

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)

2. Highlight the Parts Loops folder in the Navigator tree.
3. Click the specific loop to be deleted.
4. Right click the loop and select Delete from the pop-up menu.
5. Click **OK** to delete the loop and save your work.

4.7.4 Maintaining Subinventories in Parts Loops

The following tasks can be performed to maintain subinventories in parts loops:

- Adding subinventories to a parts loop
- Updating subinventories in a parts loops
- Deleting subinventories from a parts loop

4.7.4.1 Adding Subinventories to a Parts Loop

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)

2. Highlight the Parts Loops folder in the Navigator tree.
3. Right-click the specific loop to which you want to add a subinventory to open a pop-up menu.
4. Select Add Subinventory from the menu. The Location Details tab is active.
5. In the Location Details tab, select an organization name from the Organization list of values.
6. Select a condition type of Usable or Defective from the Condition Type list of values.

7. Optionally check the Autoreceipt check box. If you select this feature, parts shipments are received automatically during Ship Confirm at the destination subinventory.
8. Save your work.

4.7.4.2 Updating Subinventories in a Parts Loop

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Spares Planning > Planner's Desktop > (T) Parts Loops (top icon on the left)
2. Highlight the Parts Loops folder in the Navigator tree.
3. Double click the specific loop to view the subinventories assigned.
4. Click the subinventory to be changed.
5. Enter changes in the Location Details tab and save your work.

4.7.4.3 Deleting Subinventories from a Parts Loop

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)
2. Highlight the Parts Loops folder in the Navigator tree.
3. Click the subinventory to be deleted.
4. Right click the subinventory and select Delete from the pop-up menu.
5. Click **OK** to delete the subinventory and save your work.

4.8 Administering Master Stock Lists

A Master Stock List is the component of a parts loop that defines the allowable quantity of usable and defective parts. The following tasks can be performed to administer Master Stock Lists:

- Defining Master Stock Lists
- Updating Master Stock Lists

- Deleting an item from a Master Stock List

4.8.1 Defining Master Stock Lists

Prerequisites

You must define a parts loop before you can create a master stock list.

Steps

1. Navigate to the parts loop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)

2. Highlight the appropriate parts loop in the Navigator tree.
3. Open the Master Stock List tab.
4. Enter an item number or select an item from the list of values that you want to add to the Master Stock List. The Item field is case sensitive.
5. Select the revision from the list of values, if applicable.
6. Select a planner from the Planner list of values.
7. Enter the desired loop quantity for this item.
8. Optionally enter the minimum usable quantity for this item in the Minimum Good field.
9. The Plan Type field defaults based on the item definition.
10. Save your work.

4.8.2 Updating Master Stock Lists

Prerequisite

None.

Steps

1. Navigate to the parts loop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)

2. Highlight the appropriate parts loop in the Navigator tree.

3. Open the Master Stock List tab.
4. Click on the specific line to be changed.
5. Enter the desired changes in the Item record and save your work.

4.8.3 Deleting an Item from a Master Stock List

Prerequisite

None.

Steps

1. Navigate to the parts loop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)
2. Click on the specific line to be deleted.
3. Click the red X in the Toolbar and click **OK**.
4. Save your work to delete the item from the Master Stock List.

4.9 Administering Authorized Stock Lists

An Authorized Stock List is setup at the subinventory level and defines the minimum and maximum quantities of parts to be stocked in the subinventory. The following tasks can be performed to administer Authorized Stock Lists:

- Defining Authorized Stock Lists
- Updating Authorized Stock Lists
- Deleting an item from a Authorized Stock List

4.9.1 Defining an Authorized Stock List

Prerequisites

None.

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)

2. Click on the parts loop that contains the subinventory for which you want to create an Authorized Stock List.
3. Highlight the subinventory in the parts loop.
4. Open the Authorized Stock List tab.
5. Select an item from the list of values.
6. Select the Min-Max Planning check box.
7. Select the source type from these options:
   - Subinventory indicates another subinventory in the same organization
   - Inventory indicates another subinventory not in the same organization
   - Vendor indicates an external supplier
8. Enter a value in the Organization field if you selected Inventory as the source type.
9. Optionally, enter a value in the Subinventory field if you selected either Subinventory or Inventory as the source type.
10. Enter minimum and maximum quantities.
11. Optionally, enter minimum and maximum order quantities.

4.9.2 Updating an Authorized Stock List

Prerequisites

None.

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Spares Planning > Planner's Desktop > (T) Parts Loops (top icon on the left)
2. Click on the parts loop that contains the subinventory for which you want to update an Authorized Stock List.
3. Highlight the subinventory in the parts loop.
4. Open the Authorized Stock List tab.
5. Click on the specific line to be changed.

6. Enter changes in the Item record and save your work.

4.9.3 Deleting an Item from an Authorized Stock List

Prerequisites

None.

Steps

1. Navigate to the Parts Loop on the Planner's Desktop.

   (N) Planner's Desktop > (T) Parts Loops (top icon on the left)

2. Click on the parts loop that contains the subinventory from which you want to delete an item.
3. Highlight the subinventory in the parts loop.
4. Open the Authorized Stock List tab.
5. Click on the specific line to be deleted.
6. Click the red X in Toolbar menu and click OK.
7. Click Save in Toolbar menu to delete record.

4.10 Administering Reporting Hierarchies

In the Reporting Hierarchy area of the Planner's Desktop, you can create hierarchies that can be used to summarize inventory, on-order, usage and forecast information. This hierarchy consists of reporting nodes, designed around your organizational or geographical reporting structure, and can be created with subinventories attached to the appropriate nodes.

The following tasks can be performed to administer reporting hierarchies:

- Defining a Reporting Hierarchy
- Updating a Reporting Hierarchy name
- Deleting a Reporting Hierarchy
- Updating a Reporting Hierarchy node
- Deleting a Reporting Hierarchy node
- Maintaining subinventories in Reporting Hierarchies

- Adding a subinventory to a Reporting Hierarchy
- Updating subinventory parameters
- Deleting a subinventory from a Reporting Hierarchy

4.10.1 Defining a Reporting Hierarchy

Prerequisites

- Subinventories must be defined so you can add subinventories to your reporting hierarchy.
- Hierarchy nodes must be created from top to bottom.

Steps

1. Navigate to the Reporting Hierarchy.

   (N) Planner's Desktop > (T) Reporting Hierarchy (second tab down on the left)
2. Highlight the Reporting Hierarchy folder in the Navigator tree.
3. Right-click the Reporting Hierarchy folder to open a pop-up menu.
4. Select Create Reporting Hierarchy from the menu. The Hierarchy Details tab is active.
5. Enter the node name and save your work. The Hierarchy node appears in the Navigator.

Enter additional hierarc

hy nodes by highlighting the existing node to which the new node will be attached and repeat steps 3-5 above.

4.10.2 Updating a Reporting Hierarchy Name

Prerequisites

None

Steps

1. Navigate to the Reporting Hierarchy.

   (N) Planner's Desktop > (T) Reporting Hierarchy (second tab down on the left)

2. Highlight the Reporting Hierarchy folder in the Navigator tree.
3. Highlight the specific hierarchy to be changed.
4. Enter the changes in the Hierarchy Details tab.
5. Save your work.

4.10.3 Deleting a Reporting Hierarchy

Prerequisites

None

Steps

1. Navigate to the Reporting Hierarchy.

   (N) Planner's Desktop > (T) Reporting Hierarchy (second tab down on the left)
2. Highlight the Reporting Hierarchy folder in the Navigator tree.
3. Highlight the specific hierarchy to be deleted.
4. Right click the hierarchy to open a pop-up menu.
5. Select Delete from the menu and save your work.

4.10.4 Updating a Reporting Hierarchy Node

Prerequisites

None

Steps

1. Navigate to the Reporting Hierarchy.

   (N) Planner's Desktop > (T) Reporting Hierarchy (second tab down on the left)
2. Highlight the Reporting Hierarchy folder in the Navigator tree.
3. Highlight the specific hierarchy to be changed.
4. Double click on the hierarchy to see the nodes.
5. Click on the specific node to be changed.
6. Enter changes in the Hierarchy Details tab and save your work.

4.10.5 Deleting a Reporting Hierarchy Node

Prerequisites

None

Steps

1. Navigate to the Reporting Hierarchy.

   (N) Planner's Desktop > (T) Reporting Hierarchy (second tab down on the left)

2. Highlight the Reporting Hierarchy folder in the Navigator tree.
3. Highlight the specific hierarchy to be changed.
4. Double click on the hierarchy to see the nodes.
5. Click on the specific node to be deleted.
6. Right click on the node and select Delete from the pop-up menu.
7. Click OK to delete the node.

4.10.6 Maintaining Subinventories in Reporting Hierarchies

The following tasks can be performed to maintain subinventories in reporting hierarchies:

- Adding a subinventory to a Reporting Hierarchy
- Updating subinventory parameters
- Deleting a subinventory from a Reporting Hierarchy

4.10.6.1 Adding a Subinventory to a Reporting Hierarchy

Prerequisites

You must define a reporting hierarchy.

Steps

1. Navigate to the Reporting Hierarchy.

   (N) Planner's Desktop > (T) Reporting Hierarchy (second tab down on the left)

2. Highlight the Reporting Hierarchy folder in the Navigator tree.

3. Highlight the specific hierarchy to be updated and right click it.
4. Click Add Subinventory in the window. The Location Details tab is active.
5. Select an organization from the Organization list of values.
6. Select a subinventory from the Subinventory list of values.
7. The address information, country and condition type defaults.
8. Select the Autoreceipt check box if applicable.
9. Save your work.

4.10.6.2 Updating Subinventory Parameters in a Reporting Hierarchy

Prerequisites

None

Steps

1. Navigate to the Reporting Hierarchy.

   (N) Spares Planning > Planner's Desktop > (T) Reporting Hierarchy (second tab down on the left)
2. Highlight the Reporting Hierarchy folder in the Navigator tree.
3. Highlight the specific hierarchy to be changed.
4. Double click on the specific hierarchy node to view subinventories.
5. Click on the subinventory to be changed.
6. Enter changes in the Location Details tab and save your work.

4.10.6.3 Deleting a Subinventory from a Reporting Hierarchy

Prerequisites

None

Steps

1. Navigate to the Reporting Hierarchy.

   (N) Planner's Desktop > (T) Reporting Hierarchy (second tab down on the left)
2. Highlight the Reporting Hierarchy folder in the Navigator tree.

3. Highlight the specific hierarchy to be changed.
4. Double click on the specific hierarchy node to view subinventories.
5. Right-click on the subinventory to be deleted and select Delete from the pop-up menu.
6. Enter changes in the Location Details tab.
7. Click OK to delete the subinventory and save your work.

4.11 Administering Excess Rules

You can define Excess Rules to filter out excess parts that do not have a significant impact on excess value. This allows the field engineer and planner to focus on the few items that have a high impact. If you do not use excess rules, all quantities that are greater than the maximum level in the ASL are considered to be excess and would then appear in the Excess List window for return. Excess rules are applied at the organization level, which can represent either a warehouse or a group of field engineers.

Prerequisite

None

Steps to Create an Excess Rule

1. Navigate to the Define Excess Rules window using this navigation path.

   (N) Setup > Excess Rules

2. Enter a unique name for the excess rule.
3. Enter a description for the excess rule.
4. Enter a value in the Total Max Excess field to represent a maximum allowable percentage of the total excess value. For example, if you enter a 10 in this field, then excess parts are considered for return only if their dollar value is greater than 10% of the total onhand dollar value for the field engineer or warehouse. If this field is left blank, a zero is assumed and all excesses are considered.
5. Enter a value in the Line Max Excess field to represent a maximum allowable percentage of the total excess quantity for a line. For example, if you enter a 10 in this field, the maximum quantity is 20, the onhand quantity is 21, this part would not appear on the excess list because the onhand quantity is less than

10% over the maximum quantity. If this field is left blank, a zero is assumed and all excesses are considered.

6. Enter a value in the Days Since Receipt field to represent the number of days you want to exclude when calculating the excess quantity. This allows you to exclude recently received parts from the excess list. For example, if you enter a 10 in this field, then all of the parts received within the last ten days are ignored. If this field is left blank, a zero is assumed and all receipts are included in the excess calculation.
7. You can enter a value in either the Total Excess Value field OR the Top Excess Lines field. Enter a value in the Total Excess Value to represent the percentage of total excess value that you want to see on the excess list. For example, if you enter 80 in this field, the excess list will show the excess lines that comprise the top 80% of the total excess value.

   Alternatively, you can enter a value in the Total Excess Lines field to represent the number of lines that you want to see on the excess list. For example, if you enter 10 in this field, the excess list will contain the top 10 lines based on their value.
8. You can enter or select a value for Category Set if you want to exclude an item category from return, such as supplies. A category set is a feature in Inventory where yau can define your own group of categories.
9. If you enter a value for Category Set, the Category field is enabled. A category is a code used in Inventory to group items with similar characteristics.
10. Save your work.

Steps to Update or Delete an Excess Rule

1. Navigate to the Define Excess Rules window using this navigation path.

   (N) Setup > Excess Rules
2. Query on the Excess Rule name you want to update.
3. Update the values as needed.
4. You can delete the Excess Rule by clicking the Red X in the toolbar. Do not delete the rule if it is used in planning parameters.
5. Save your work.

4.12 Administering Delivery Times

Spares Management provides a method for specifying the delivery times for shipment methods that are defined in Oracle Inventory. For example, if your carrier can guarantee overnight delivery by a specific time of day, this information allows Oracle Scheduler to schedule your field engineer to be on site for a high priority task soon after the part arrives.

Prerequisites

Shipment methods must be defined in Oracle Inventory.

Freight Carriers must be defined in Oracle Inventory.

Steps

1. Navigate to the Define Delivery Time form by using this navigation path.

   (N) Setup > Delivery Time

2. Execute a query for the organization you want to update. The window displays the shipping methods and freight codes that have been defined in Oracle Inventory for each inventory organization.
3. Enter a value in the Lead Time field the number of time units this freight carrier commits to make a delivery. For example, for an overnight delivery, enter a 1 in this field and Day in the UOM field.
4. In the UOM field, enter the unit of time that corresponds to the previous field, Lead Time.
5. Enter the carrier's expected delivery time in the Delivery Time field.
6. Enter a time in the Cutoff Time field. In a warehouse, the cuttoff time is used to determine the last point in time that orders received that day can be included in a specific shipment method. For example if the carrier and method of shipment is UPS/Next Day AM then the cuttoff might be 4:00 PM to meet the scheduled UPS pickup at 6:00 PM for delivery the next day in the morning.
7. The Comfort Zone is the time you want to allow between the expected delivery time of the part and the scheduled arrive time for the field engineer. Enter a number in the Comfort Zone in hours.

4.13 Administering Addresses and Subinventories

You can assign ship to addresses and subinventories to your field engineers in the Resource Addresses and Subinventories window. A typical field service organization may have hundreds and even thousands of field engineers, so this window is designed to provide an efficient method for maintaining ship to addresses and subinventories for your field engineers. The addresses defined in this window appear in the list of values for the ship to address when you order parts in the Parts Requirement window.

The subinventories defined in this window appear in the list of values for the field engineer's subinventories when you order parts in the Parts Requirement window. You can assign an owner for the subinventory, if needed. This feature can be used when more than one field engineer shares a subinventory and one person needs to be assigned as an owner to be responsible for managing excess parts. When an owner is assigned, an organization and subinventory for returning the excess parts is also assigned.

Prerequisites

1. Field engineers must be defined as employees.
2. Subinventories must be defined.

Steps to Add a New Resource Address or Subinventory

1. Navigate to the Resource Addresses and Subinventories window by the following the navigation path.

   (N) Setup > Resource Addresses and Subinventories

2. Select the appropriate resource type from the Resource Type list of values.
3. Select a field engineer name from the Resource Name list of values. The list of values only displays the field engineers who have been assigned to the Resource Type you selected.
4. The Phone, Email, Start Date and End Data information for the field engineer is displayed if these fields have been populated in Oracle HRMS.
5. The Addresses tab opens by default.
6. Select an address style for the appropriate country from the Address Style list of values.
7. Tab to the Address field to open the Location Address flexfield. Enter the details for the ship to address.

8. If you want this address to become the default address for this field engineer, check the Primary Address check box. You can set only one address as the primary address and you must have one primary address.
9. You can define additional addresses for this field engineer by adding more address lines.
10. Open the Subinventories tab to associate one or more subinventories to this field engineer.
11. Enter an inventory organization or select one from the Organization list of values.
12. Enter a subinventory name or select one from the Subinventory list of values. The list of values displays only those subinventories which have been defined for the organization you selected.
13. You can select a value of Usable or Defective in the Condition field if the condition has not been defined in the parts loop. If the condition for this subinventory has been defined in the parts loop, this condition defaults in this field and is not updateable.
14. The Start Date defaults to today’s date. You can override this date with a future date, if needed.
15. Check the Default column if you want this subinventory to be used as the default subinventory for this field engineer. Only one subinventory for each Condition Type can be designated as the default subinventory for this field engineer. You must define one usable subinventory as the default.
16. The Start Date field defaults to today's date. You can override this value to a date later than today’s date, if needed.
17. The End Date field is used to inactivate a subinventory assignment.
18. If you check the Owner box, the field engineer name is assigned as the Owner Name for this subinventory. Each subinventory can have only one owner.
19. Assigning an owner enables the Org and Sub fields in the Return region so you can specify the subinventory for returning excess parts. This location may or may not be the same location as the subinventory you are assigning the field engineer. This subinventory must be of the same Condition Type as the source subinventory.
20. You can assign multiple subinventories to a field engineer. You can assign subinventories from more than one organization to a field engineer.
21. Save your work.

Steps to Update a Resource Address or Subinventory

1. Navigate to the Resource Addresses and Subinventories window by using the following navigation path.

   (N) Spares Logistics > Resource Addresses and Subinventories

2. Query for your existing resource name.
3. You can assign new addresses or update or delete existing address information.
4. You can inactivate an address by checking the Inactive check box. You cannot inactivate a primary address. By setting an address to inactive, this address will no longer be available for selection for this resource in any other windows.
5. You cannot update the address style of an address.
6. You can assign additional subinventories, update subinventories, and inactivate subinventories.
7. You can add or update the owner of the subinventory.
8. You can add or update the Return organization and subinventory.
9. The Condition Type field is updateable only if the condition type was entered manually.
10. Save your work.

4.14 Administering Planning Parameters

You can administer the parameters for calculating the recommended min-max levels for the authorized stock lists in the Planning tab of the Planner's Desktop.

The planning parameters are used to control and manage the planning process for both the field engineers and the warehouses. Each warehouse is represented by an inventory organization and each field engineer is represented by a subinventory. Field engineers are grouped together into inventory organizations.

The planning parameters include an optional calculation for safety stock. Safety stock is the quantity of parts inventory that serves as a buffer to protect your organization from shortages that may results from unanticipated unusually high levels of usage.

An Economic Delivery Quantity (EDQ) is also calculated to provide the lotsize or operating inventory component of the planning.

Prerequisites

1. Forecast rules must be defined.
2. Calculation rules must be defined.
3. Excess parts rules must be defined.
4. Planners must be defined.

Steps to set planning parameters at the planning node level

Planning parameters set at the planning node will default down to the organization and subinventories if defaults have not been set at those levels.

1. Use the following navigation path to administer planning parameters.

   (N) Planners Desktop > (T) Planning (the bottom icon on the left)

2. Highlight the Planning node in the navigator. The planning parameters set at this top level are required and serve as default values for the underlying inventory organizations and subinventories.
3. The Organization Type field is protected from update at this level.
4. Select a forecast rule from the Forecast Rule list of values.
5. Select a calculation rule from the Calculation Rule list of values.
6. Optionally select an excess parts rule from the Excess Parts rule list of values.
7. Enter a value in the Service Level field to represent a percentage to be used to determine safety stock quantity. This value must be between 1 and 100 but under normal operating conditions, it would be set somewhere between 80% and 90% The service level expressed as a percent determines the likelihood that a field engineer or warehouse has the part onhand when needed or requested. A service level of 90% for a field engineer means that the parts are onhand with the field engineer when needed 90% of the time.
8. Enter a value in the EDQ Factor field to be used in the Economic Delivery Quantity calculation to determine EDQ quantity. This value must be between 1 and 100. The EDQ factor determines the lot size or operating inventory. Under normal operating conditions, the EDQ factor would be set between 5 and 20.
9. Select Yes or No to enable this plan for Authorized Stock Lists.
10. Select Yes or No to use Safety Stock for this plan.
11. The Condition Type and Planner fields are not enabled at this level.

12. Save your work.

Steps to set planning parameters at the inventory organization level

Planning parameters set at the organization node will default down to the subinventories if defaults have not been set at the subinventory.

1. Use the following navigation path to administer planning parameters.

   (N) Planners Desktop > (T) Planning (the bottom icon on left)

2. Click the + sign next to the Planning node to display the list of inventory organizations.
3. Highlight the inventory organization for which you want to set the planning parameters. The Planning Parameters tab for the inventory organization opens.
4. You can select an Organization Type of Warehouse or Field Engineer for this inventory organization.
5. All other parameters set at the planning level are displayed by default. You can override these default values as needed.
6. You can select a planner for this inventory organization.
7. Save your work.

Steps to set planning parameters at the subinventory level

1. Use the following navigation path to administer planning parameters.

   (N) Planners Desktop (T) Planning (the bottom icon on left)

2. Click the + sign next to the Planning node to display the list of inventory organizations.
3. Click the + sign next to the inventory organization that contains the subinventory you want to update.
4. Highlight the subinventory you want to update.
5. You can select the Condition Type at the subinventory planning level. The choices are Usable and Defective.
6. All other parameters except Organization Type that were set at either the planning level or the inventory organization level are displayed by default. You can override these defaults as needed.
7. If you do not want a subinventory to be included in the ASL calculation, you can set the ASL flag to No.